

InDesign CC Notes

Notes by Gavin Kirby

Building your documents.

Graphic Design becomes a bit more complicated when you are designing over multiple pages. You will need to keep track of many different elements, styles, layouts, typographic formats etc. This task is made easier by several functions available to you in InDesign, like Master Pages, Paragraph Styles, Character Styles etc.

Imagine that your task is to build a large house. You would first plan the layout of the house by drawing the basic structure, the number of rooms, the room dimensions and roughing out what goes in each room.

Once the planning is done, you can now build your house by choosing sturdy materials for the construction and methodically adding all the details to each of the room.

What does this have to do with designing a multi page document? I hear you ask. Well, think of the large house as your task of designing a multi page document (MPD). You would not dream of building a house without any plans and the same applies to building an MPD, planning is *very* important.

Putting the house together with poor building materials will give a poor finish, plus you don't want it to fall down. The contents of your MPD are your building materials. They need to be right. Images need to be the correct size, colour mode, and resolution. Text needs to be spelt correctly. Remember this, *if you put crap in, you will get crap out!!*

The rooms of the house are your pages, some will be standard while others will have a specific job within the MPD. You will need to have a system to help style your pages to give continuity throughout your document.

Planning with Post-it's.

Planning should always start with pen/pencil and paper. In the early stages of a project it is far quicker at roughing out ideas than digital methods and you are only limited by your imagination and not your ability to use software.

First off it's good to get an overview of the content in relation to what you are being asked to design. Different design problems will handle the content in different ways. However, these early planning stages do have many similarities.

When designing a MPD one of the very first stages is to work out a rough running order for the pages. This is simply focusing on what pages appear and in what order.

A flexible and fast method is to write the different page types onto Post-it notes and start to arrange them on a wall, or a table, or a large sheet of paper. Page types to consider are Front cover, Back cover, Contents page, Feature articles, Interviews, Adverts etc.

Using Post-it notes will allow you to adjust the running order really easily and give greater flexibility to add in or remove pages if needed.

Content Lists, Thumbnail Sketches, and Wireframes.

This is where you start making general rough decisions on how you are going to organise the page content for your designs.

At its most basic level every design project is just an exercise in arranging and managing content (text, images, illustrations, data, statistics, colours, logos, symbols etc). You will need to spend some time looking at the content and determining the various levels of importance and then apply this knowledge to your designs.

Making lists for what content needs to be included into your page designs is a great place to start. This will help to sort out the visual hierarchy for your designs.

From the content lists you can now start sketching with purpose and develop thumbnail sketches that accommodate the required content.

Thumbnail sketches are small quick rough sketches that help you to workout where the main bits of content are to go on the page layout. Their quick rough nature enables you to generate several design options in a short space of time. The best Thumbnails will then be further refined by creating wireframes.

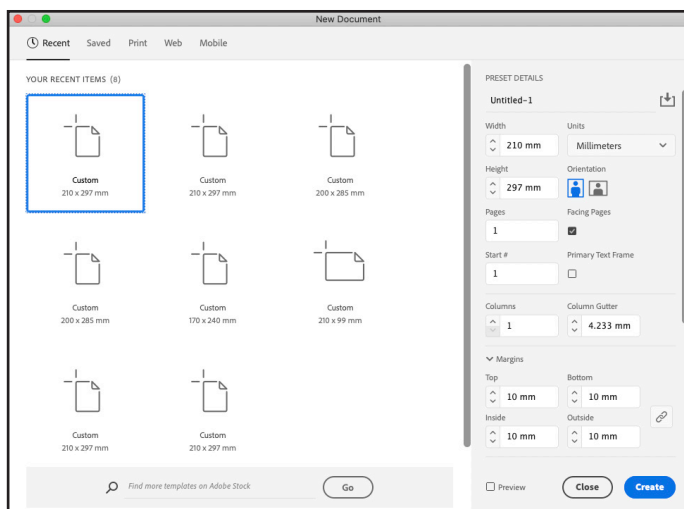
The term Wireframe is probably associated more with App and Web design but it also has a valuable role in most design processes. From an editorial perspective the wireframes will help determine the structural layout of your pages and will essentially become the blueprint for your Master Pages layouts.

Getting Started.

The first thing to do is to create a *New Document*. This sounds easy and straight forward but there are several key measurements that you need to know about the document that you are about to design so that they can be input at this stage. These can be altered later but it is best to sort this out before you have added too much content and have spent time on your layouts.

Creating a New Document.

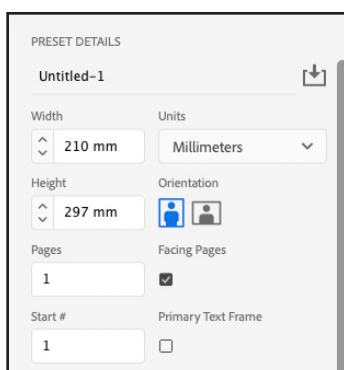
1. To create a New Document go to *File - New - Document* or you can press *cmd+N* on the keyboard.



2. Take a moment to look at the options available to you in the *New Document* window.

Preset Details: If you are regularly working on a set layout format, you can save the preset information and select it from this menu.

Width / Height: Either choose a common page size from the large panel on the left or you can create a custom page size.



Orientation: Portrait or Landscape.

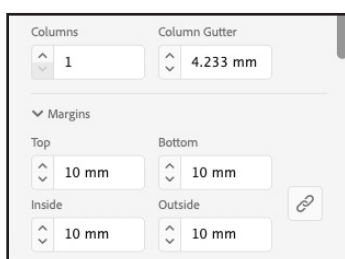
Facing Pages: Depending on the type of document you are working on and the type of bind or fold you plan to use you may need to have left and right pages as apposed to individual pages.

Pages: Allows you to automatically add the number of pages for your document.

Start # : If you are working on a large project like a book, it is a good idea to break it up into smaller documents. *Start #* allows you to keep the page numbering consistent through the documents.

Primary Text Frame: This creates an automatic text frame on your master pages. It is recommended not to use this as you will want to have total control over your text boxes.

Columns: If you have planned your document properly you will know how many columns you want to be working with for the majority of your pages, this area allows you to set this.

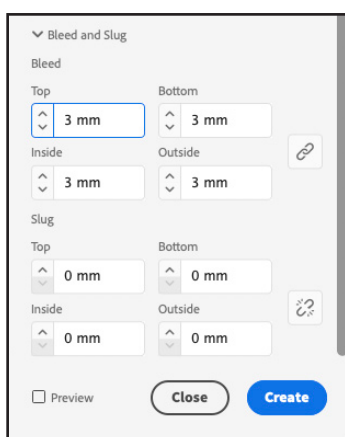


The screenshot shows a settings panel with two main sections. The top section is titled 'Columns' and 'Column Gutter'. Under 'Columns', there is a dropdown menu set to '1'. Under 'Column Gutter', there is a text input field set to '4.233 mm'. The bottom section is titled 'Margins' and is expanded. It contains four input fields: 'Top' (10 mm), 'Bottom' (10 mm), 'Inside' (10 mm), and 'Outside' (10 mm). There are up and down arrow icons for each field. A link icon is visible on the right side of the 'Outside' field.

Columns Gutter: Alters the space between columns.

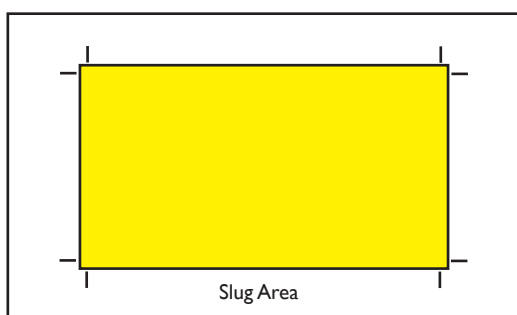
Margins: Sets the space between the edge of the page to the content area on your design layout. If you are working on single pages these will be *Top, Bottom, Left, Right*. If you are working on facing pages the these will be *Top, Bottom, Inside, Outside* (Inside refers to the edge by the bind or fold).

Bleed: If your design has any content running up to the edge of your design you must allow it to '*Bleed*' over the edge of the page by at least 3mm. The bleed prevents white lines appearing at the edge of the art work due to poor trimming. *ALWAYS add a 3mm bleed on every document even if you don't need to use it!!*



The screenshot shows a settings panel titled 'Bleed and Slug'. It is expanded to show two sections. The first section is 'Bleed', which has four input fields: 'Top' (3 mm), 'Bottom' (3 mm), 'Inside' (3 mm), and 'Outside' (3 mm). There are up and down arrow icons for each field. A link icon is visible on the right side of the 'Outside' field. The second section is 'Slug', which also has four input fields: 'Top' (0 mm), 'Bottom' (0 mm), 'Inside' (0 mm), and 'Outside' (0 mm). There are up and down arrow icons for each field. At the bottom of the panel, there is a 'Preview' checkbox (unchecked), a 'Close' button, and a 'Create' button.

Slug: Refers to the area of scrap paper beyond the edge of the bleed area. This area is used to carry print related information like colour bars, dates, and sign off information.



4. Once you have input all of your New Document parameters, click *Create* to view your new document.

Altering an Open Document.

It is quite common to want to alter some of the *New Document* settings in an existing document. This could be due to a change of design style or you forgot to add Bleed. The settings are spread over two palettes.

1. Go to *File - Document Setup* or press *alt+cmd+P*.



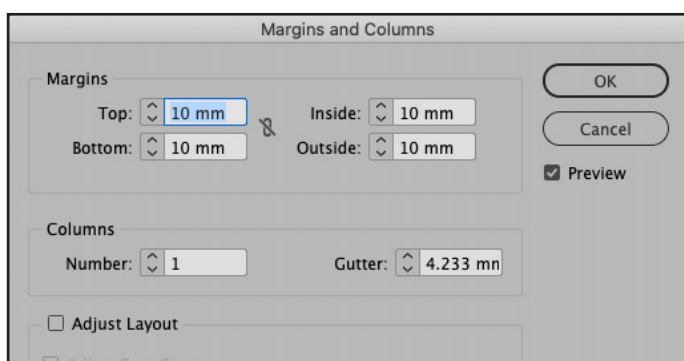
The **Document Setup** dialog box is shown. It contains the following settings:

- Intent:** Print (dropdown)
- Number of Pages:** 1 (text field)
- Start Page No:** 1 (text field)
- Facing Pages:** ☒ (checkbox)
- Primary Text Frame:** ☐ (checkbox)
- Page Size:** A4 (dropdown)
- Width:** 210 mm (text field)
- Height:** 297 mm (text field)
- Orientation:** Portrait (radio button selected, Landscape also available)
- Margins:**
 - Top:** 10 mm (text field)
 - Bottom:** 10 mm (text field)
 - Inside:** 10 mm (text field)
 - Outside:** 10 mm (text field)
- Bleed and Slug:**
 - Top:** 3 mm (text field)
 - Bottom:** 3 mm (text field)
 - Inside:** 3 mm (text field)
 - Outside:** 3 mm (text field)
 - Slug:** 0 mm (text field)
- Adjust page elements to document changes:** ☒ (checkbox)
- Adjust Layout...** (button)
- Preview:** ☐ (checkbox)
- Cancel** (button)
- OK** (button)

Many of the settings that you may need to alter are available to you so that you can alter things retrospectively.

Notice that some options are not available from this window. The Column and Gutter width options are found in a different window.

2. Apply any alterations that you want and click *OK* or just *Cancel* to close the window.
3. Go to *Layout - Margins and Columns*.



The **Margins and Columns** dialog box is shown. It contains the following settings:

- Margins:**
 - Top:** 10 mm (text field)
 - Bottom:** 10 mm (text field)
 - Inside:** 10 mm (text field)
 - Outside:** 10 mm (text field)
- Columns:**
 - Number:** 1 (text field)
 - Gutter:** 4.233 mm (text field)
- Adjust Layout:** ☐ (checkbox)
- Adjust Font Size:** ☐ (checkbox)
- OK** (button)
- Cancel** (button)
- Preview:** ☒ (checkbox)

As the name suggests you can alter the *Margins* and *Columns* of your document in this window. There are also a couple of new buttons available to you, *Preview* and *Adjust Layout*.

Preview is self explanatory, when it is enabled you can see your alterations in real time and how they affect your layout design. This is very useful when you are using *Adjust Layout* as well.

Adjust Layout will attempt to make adjustments your existing content into the new column structure. This is very hit and miss and can cause more problems for you over several pages. As such I do not use this option.

4. Click *OK* or *Cancel* to close the window.

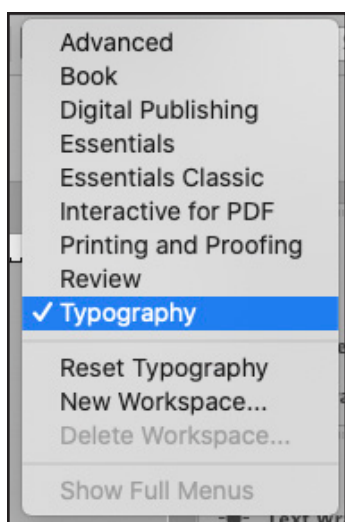
Setting Your Workspace.

There are many different work spaces and palette configurations that you can use in InDesign. As the majority of your work will be typographic in nature it is best to setup your workspace as follows.

1. Up in the top right hand area of the screen you will see the Workspace Menu. (Depending on who has been using the software before hand, you may see different titles here).



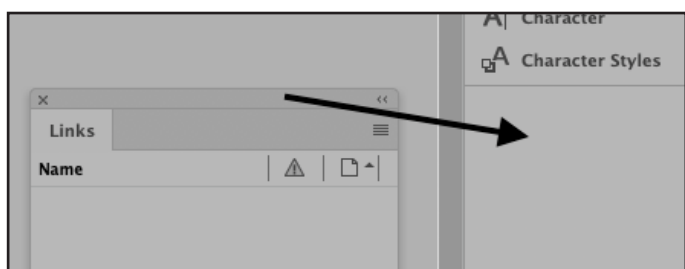
2. From the Menu choose *Typography*. (It's also advisable to go back into the workspace menu and choose *Reset Typography* to ensure that all of the expected palettes are visible).



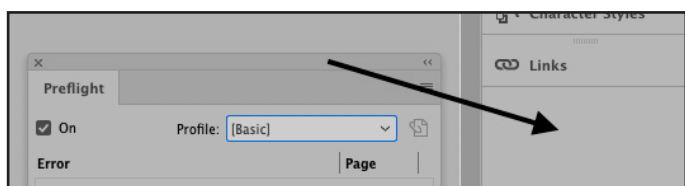
Adding Useful Palettes.

You can customise your workspace by adding palettes that you use on a regular basis. Here are two that I recommend you add.

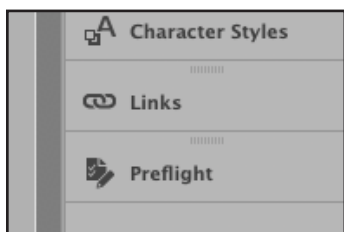
1. From the *Window* menu choose *Links*.
2. Drag the Links palette into the palette list on the right of the screen.



3. From the *Window* menu choose *Output - Preflight*.
4. Drag the Preflight palette into the palette list on the right of the screen.



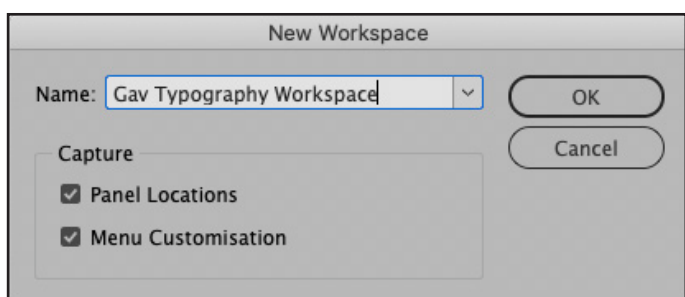
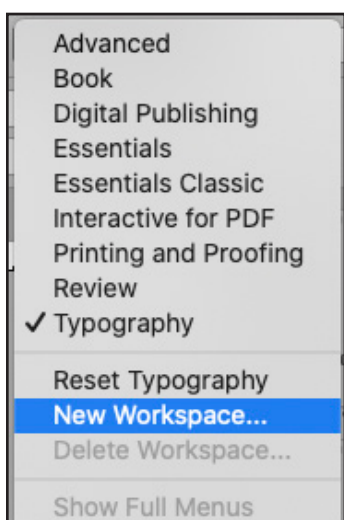
Although you may not be using these palettes much to begin with they come in really handy the closer you get to outputting your work.



Saving A Workspace.

Now you have added some extra palettes and set your workspace how you want it you can now save it as a selectable option.

1. From the *Workspace* menu in the top right of the screen choose *New Workspace*.
2. In the new window enter a suitable name for your customized workspace and click OK.



Basic Palettes to Start With.

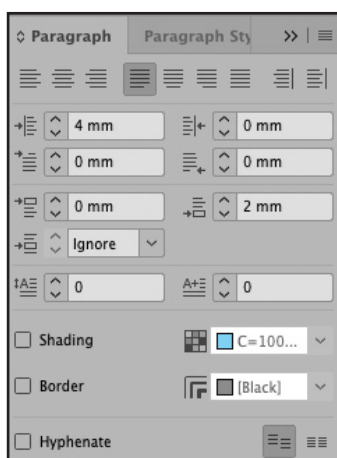
There are many different palettes that enable you to add to your design work but I advise you master the basic palettes first as these will be what you use the most.

Tools: Found on the Left of the InDesign window. This contains all of the cursor tools. Selection Tool, Direct Selection Tool, Type Tool, Pen Tool, Rectangle Frame Tool etc.

Control: Runs along the top of the InDesign window and will change depending on which tool you have selected. With the Selection Tool active the Control panel will show options relating to position and scale. With the Type tool active the Control panel will show

options relating to Character styles, Paragraph Styles, Alignments, and other typesetting choices.

Paragraph / Character / Pages: Found on the Right of the InDesign window. The Paragraph palette gives all the values for adjusting and styling your paragraphs. The Character palette gives all the values for styling your typefaces.



As your projects become more complicated you will need to use more advanced palettes like **Layers / Paragraph Styles / Character Styles / Text Wrap** etc.

Basics of Adding Content.

This next section will look at the basics of adding content to your InDesign document

- Adding extra pages.
- Adding Images.
- Resizing Images.
- Adding Text.
- Linking Text boxes.

Adding Pages via the Pages Panel.

More often than not you will want to add pages to your InDesign document. There are several ways to do this but the easiest way is via the *Pages* panel.

1. Click on the *Pages* panel button. If it is not visible go to *Window - Pages*.

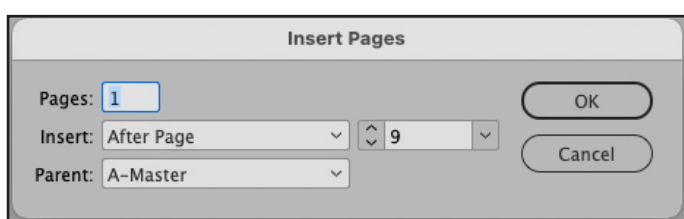
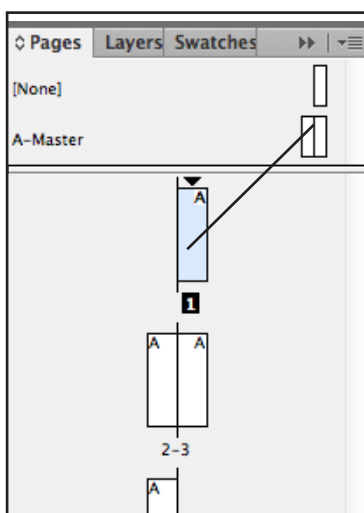
The *Pages* panel has two sections. The upper is for your *Parent Pages* (also referred to as Master Pages) and the lower is for the pages of your document. By default your pages are viewed one above the other as individual pages or as spreads if you are working with *Facing Pages*.

2. One method to add pages in the *Pages Panel* is to drag and drop a parent page style into the document section of the panel.

This method allows you to choose the master page style and apply it directly to the new page that you want to create.

3. Another method is to click the + at the bottom of the *Pages Panel*. This is the *Create new page* button.

4. If you hold down *alt* and click on the *Create new page* button you will activate the *Insert Pages* window.

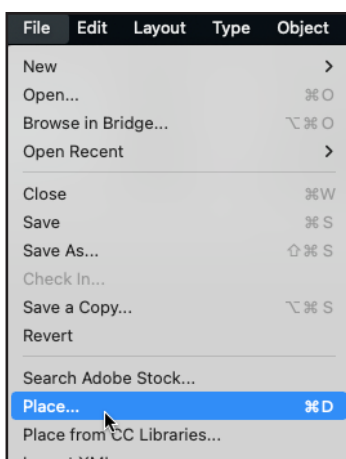


Here you can set the number of pages you want to insert, where you want to insert them in the document and which master page style you want to use.

Adding Images.

Currently there is a much greater synergy between the different Adobe applications that enables you to copy and paste or drag items from one application to another. This sounds great in principle but just because you can doesn't mean you should.

The best way to add images to InDesign is to place them via the *File - Place* command. This method of placing images will enable you to better track the quality of the images that you are using and Preflight your files more effectively before saving for final output.



Resizing an Image.

An easy way to make your images larger or smaller is to use a combination of keys and clicking and dragging the bounding box around the selected image.

1. When you select an image or object you should see a Blue bounding box with eight anchor points along its edge.

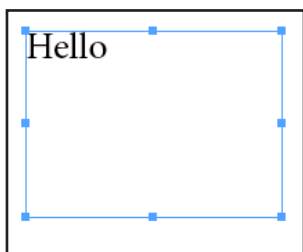
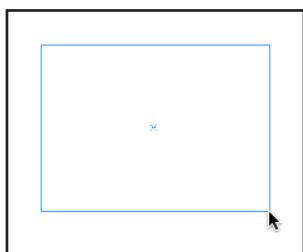


2. Make sure that you have the black arrow (*Selection Tool*) selected then hold down *Shift + Command* on the keyboard.
3. Still holding the keys, use the mouse to click on one of the coners of the bounding box and drag the mouse to either make the image bigger or smaller.
4. Release the mouse, then release the keys.



Adding Text.

Using the *Type Tool* to create text boxes is a really fast way to add text to your document.

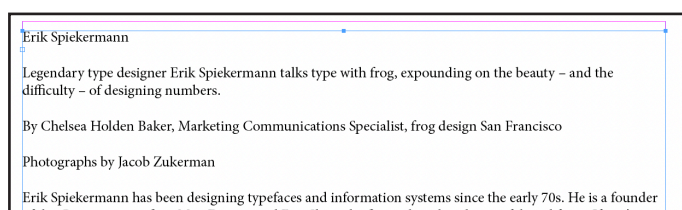


However, it is likely that you are wanting to import a large volume of text for your design. This is done in the same way that you place an image by going via the *File - Place* command.

How this works will depend on how much work you have done in the InDesign document before you import the text.

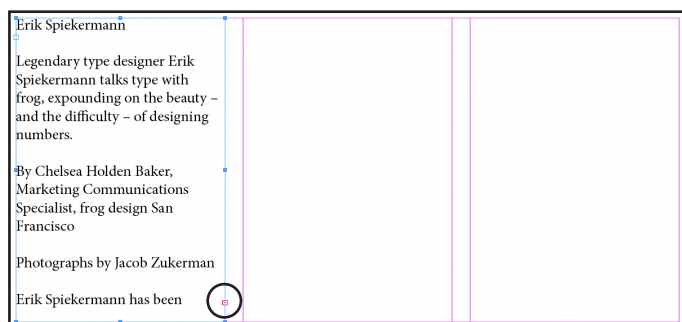
Blank Document (One large single column).

1. Go to *File - Place* and select the text file that you want to import. InDesign can import most forms of simple text files.
2. Click on the page. This should create a large text box that fills the width of the space within the margins.



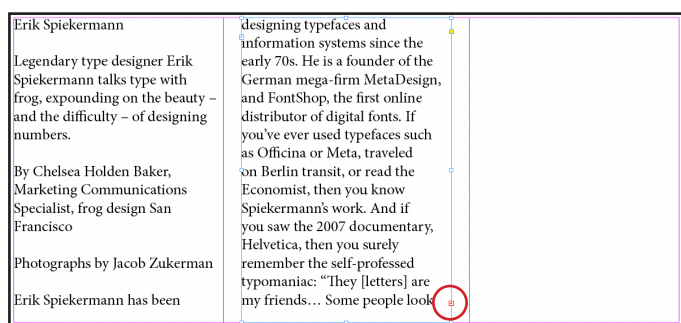
Document with Columns set up.

1. Go to *File - Place* and select the text file that you want to import.
2. Click in top left corner the first column. This should create a text box that fills the width and height of the first column.

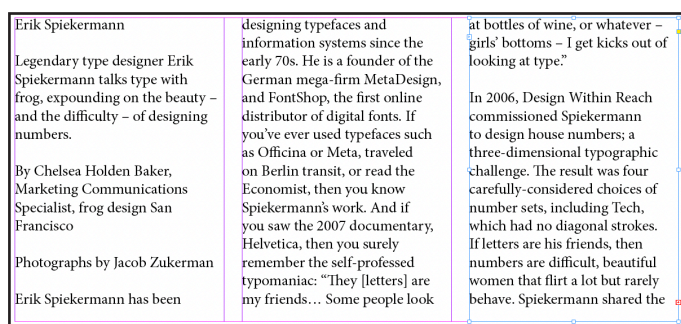


3. If there is too much text for the column you will see a small red box appear near the bottom right corner as indicated on the image above.

- To add text to the other columns select the *Selection Tool* (the black arrow) and click on the red *Overset Text* indicator.
- The cursor will change to show that you have picked up the overset text. Now click in the second column.



- If there is too much text for the column you will see a small red box appear near the bottom right corner as indicated on the image above. Repeat steps 4 and 5 if you have more columns to fill.



This same method of linking can be applied to shapes that you draw as part of your design.

Image Frame and Text Wrap Basics.

Now that you are familiar with adding and resizing images as well as adding text and linking text boxes. This next section will take a closer look at image frames and how to get text to wrap around objects in your designs.

- Image Frame and Image File.
- Cropping an Image.
- Image Frame Shapes.
- Text Wrap Basics.

Image Frame and Image File.

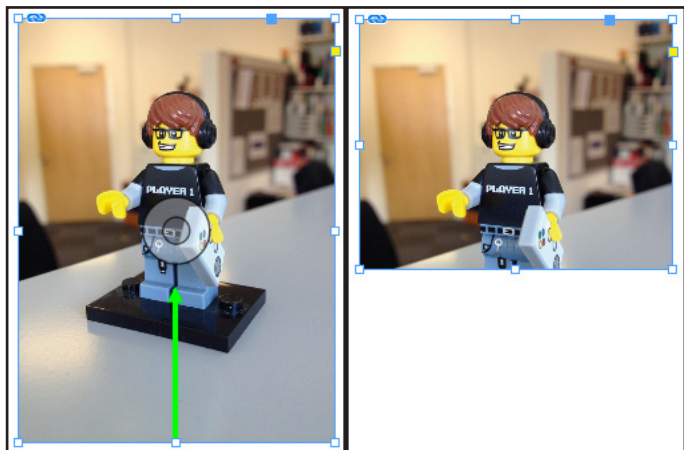
It is important to remember that there are two parts to any placed image in InDesign.

There is the Image Frame which is indicated by the Blue Bounding Box that you will see around the edge of the object. Then there is the image that sits within the frame which will have a Brown Bounding Box when selected.

Cropping an Image (Masking).

Technically this is not cropping an image, you will be masking of part of the image by changing the aperture of the Image Frame. The easiest way to do this is by using the Image Frame Bounding Box.

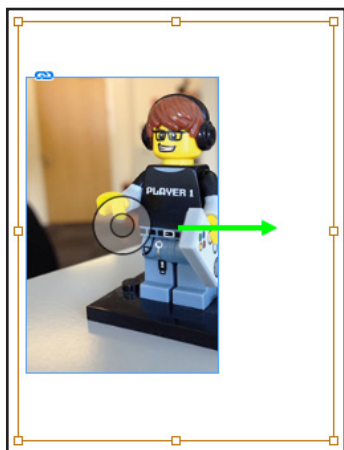
1. Click on the image you want to crop so that you can see the Blue Bounding Box.
2. Click on one of the Bounding Box anchor points along an edge or in a corner and drag into the image .



In this example, all of the Image Frame edges have been moved to mask off all edges of the image contained inside the frame.

1. Clicking on the circles in the centre of the image will select the image inside the frame and show the edges of the image indicated by the Brown Bounding Box.
2. You can now move the image inside the frame to adjust what part of the image can be seen through the frame aperture.

It's worth spending some time to familiarise yourself with this process so you know which part of the image you have selected.

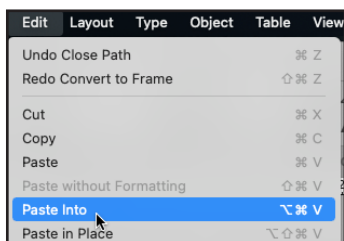
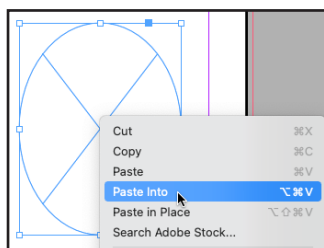
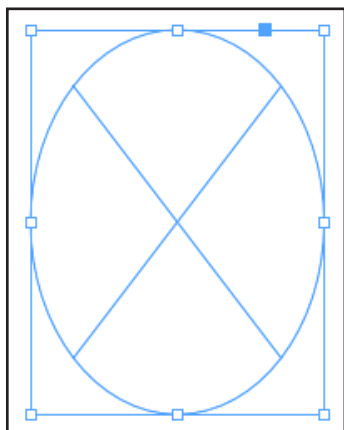
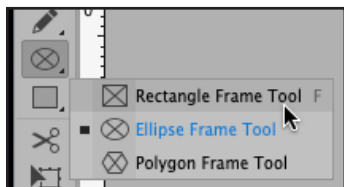


Now that you know how to select images contained inside an image frame I can show you how to change the shape of the image frame.

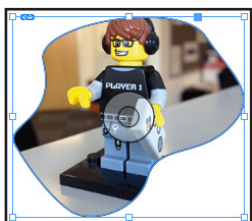
Image Frame Shapes.

By default your image frames will be square or rectangular in nature. However, depending on your design you may require your image to appear in a different shaped frame.

1. From the Tools Palette, click and hold on the *Frame Tool* icon. This will be indicated by a shape with a cross in it.
2. Choose either the *Ellipse* or *Polygon Frame Tool* and draw a shape on your project page. In this example I have used an Ellipse.
3. Click on the circles in the centre of the image you want to place into the new frame. Here you can see the Brown Bounding Box which indicates that the image is selected and not the rectangular image frame.
4. Go to *Edit - Copy* or press *Command+C*.
5. Select the new text frame and go to *Edit - Paste Into*. This can also be done by right clicking on the frame and selecting *Paste Into* from the pop up menu.



This will also work with complete shapes that you have drawn with the Pen Tool.

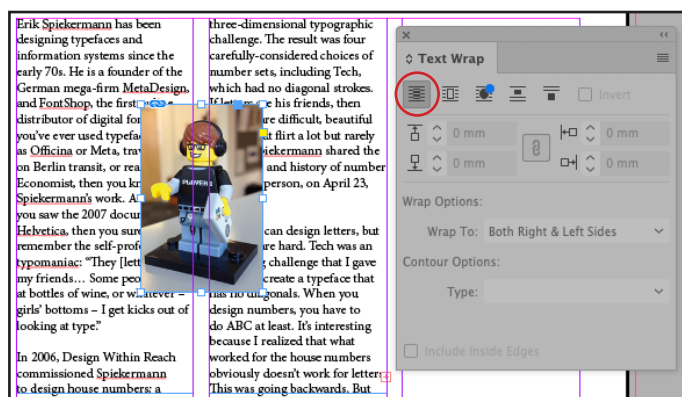


Text Wrap Basics.

There will be occasions when you may need to have an image or object sit within or overlap a column of text. This will then cause the text to have to ‘wrap’ around the object so that it is not obscured.

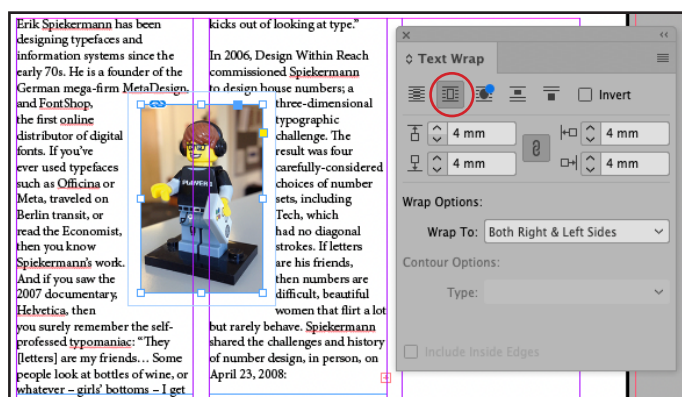
To wrap around images and objects that are square or rectangular the process is quite simple.

1. If the Text Wrap Palette is not currently visible go to *Window - Text Wrap*.



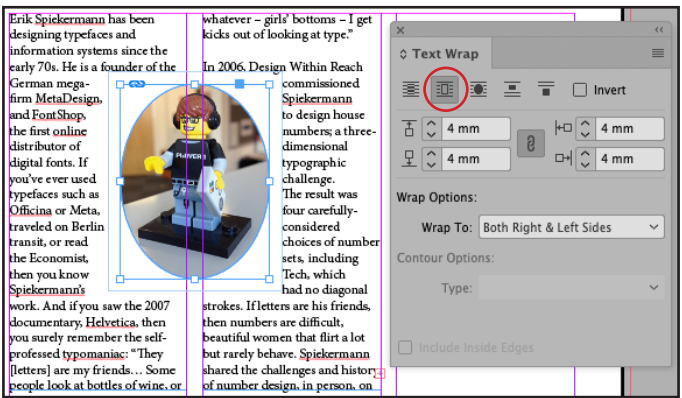
Here we have a selected rectangular image frame that is sitting on top of two columns of text. There is currently no Text Wrap assigned to the image frame so the image is obscuring some of the text.

2. With the image frame selected click on the *Wrap around bounding box* button in the Text Wrap palette.

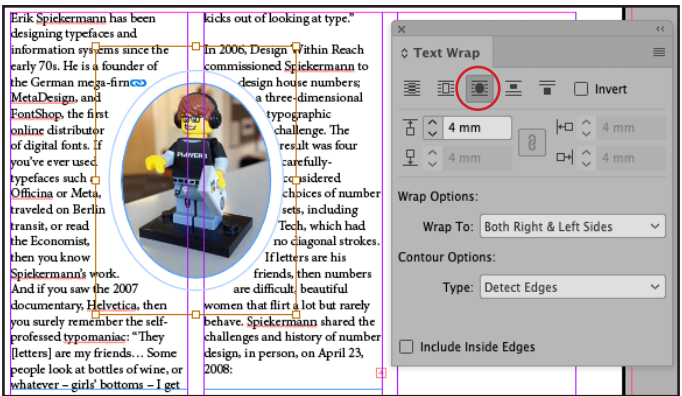


Clicking on the *Wrap around bounding box* button will force the obscured text back into view. You can then add extra spacing around all edges of the image frame to improve the overall visual, I have set this example to 4mm on all edges. This method also allows for different distances to be assigned to each edge as desired.

It is a similar process to wrap around images and objects that are circles, ellipses, polygons or more irregular shapes.

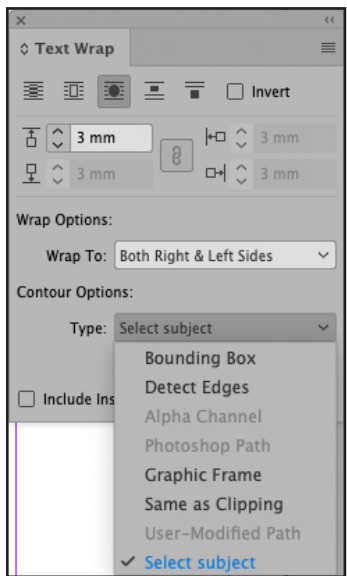


Here I have swapped the rectangular image frame to an elliptical frame. The Text Wrap is still set to the *Wrap around bounding box* which is not giving a good wrap for the elliptical shape.



Switching to the next button, *Wrap around object shape*, we have access to options that allow for a much neater wrap around. Note that any additional spacing will apply to all edges equally.

There are several options available in the *Contour Options* section but they are greatly dependent on the image that you are trying to wrap text around.



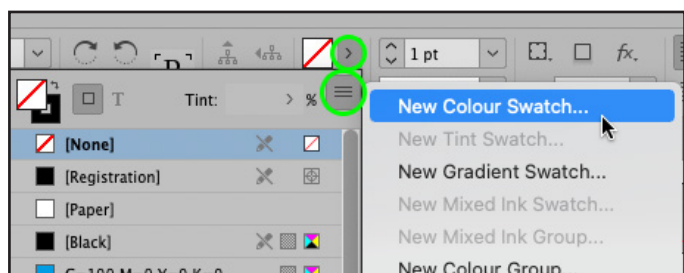
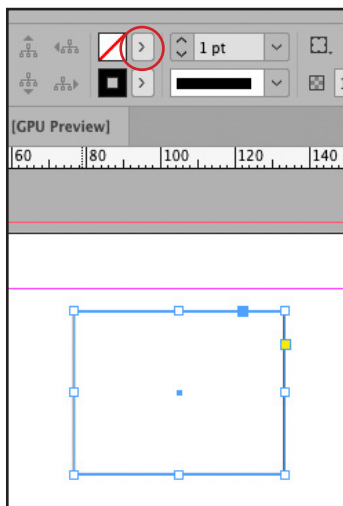
Mixing and Adding Colours.

Depending on what type of output you are designing for will depend on the type of colour mode you are wanting to mix your colours in.

Most of the work that you produce in InDesign will most likely be for a print based output. If this is the case then you will need to mix your colours in CMYK (Cyan, Magenta, Yellow, Black).

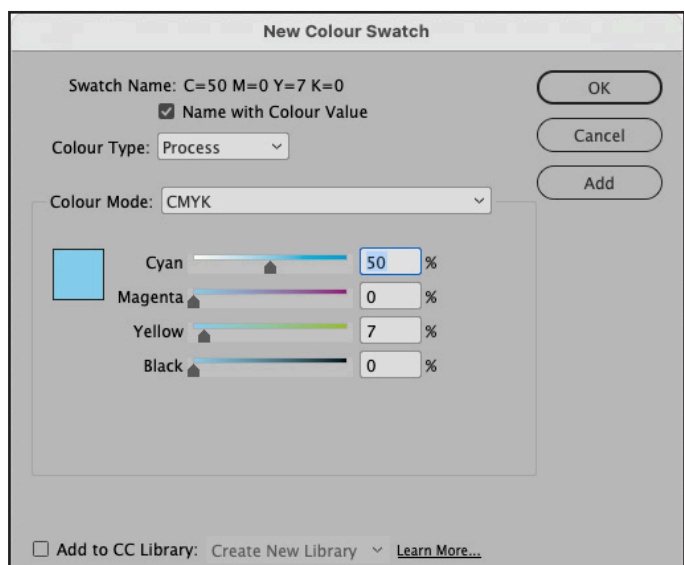
The best way to mix and add colours is via the Swatches or Colour palettes.

1. If you do not have the Swatches Palette visible go to *Window - Colour - Swatches* or click on the colour fill option in the Control Bar (this is the method I will be using but you can do exactly the same from the Swatches Palette).
2. Click on the Swatches Palette menu and choose *New Colour Swatch*

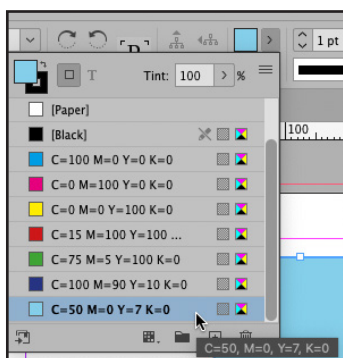
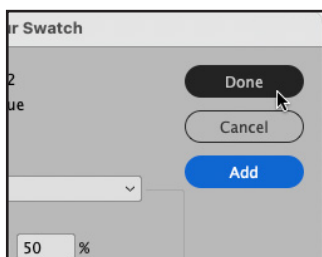


3. In the *New Colour Swatch* palette set the *Colour Mode* (CMYK for Print) then mix your colour by moving the sliders.

Colour Type will allow you to set either *Process* (a mix of CMYK also known as a *composite colour*) or *Spot* (a single unique colour).

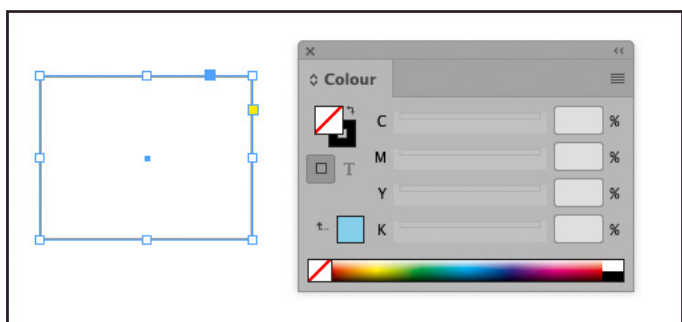


- Once you have mixed your colour click on *Add* to add the colour to the swatches and then click *Done* to close the palette. (Note: You can continue to add extra colours to your swatches by mixing the colour and clicking the *Add* button before you click *Done*).

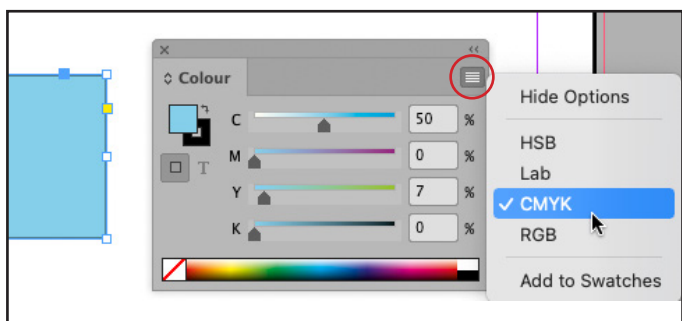


To add a Colour from the Colours Palette.

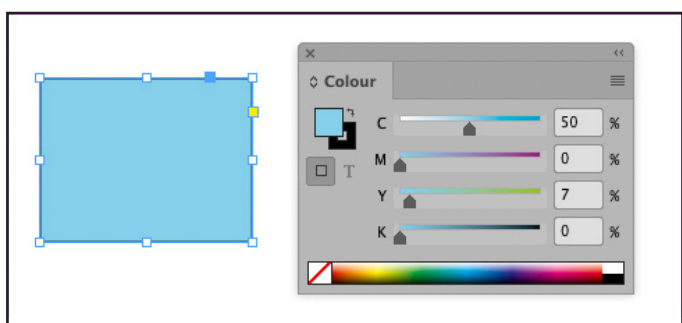
- If you do not have the Colour Palette visible go to *Window - Colour - Colour* to access the palette.



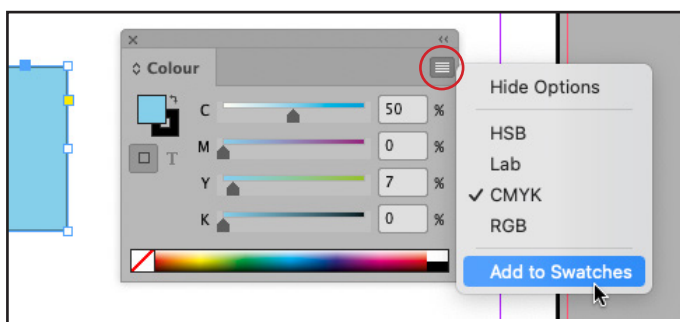
- From the *Colour Palette* menu, select your colour mode.



- Use the sliders to mix your colour.



4. To add your colour to the document swatches, select *Add to Swatches* from the palette menu.

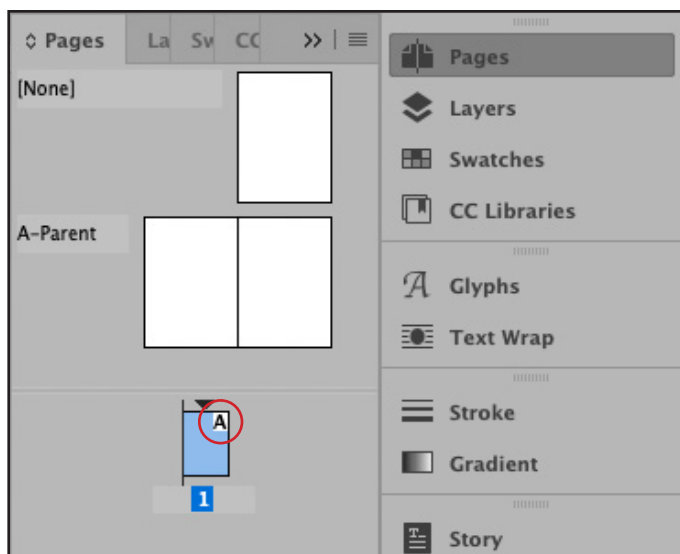


Working with Parent Pages (Master Pages).

Parent Pages are really useful when working on multiple page documents. They allow you to control the design of common elements across your document, things like page structure and layout, page numbering, page headers etc. They are also very handy when you are working in a team of designers or when you are regularly designing on monthly, weekly or daily publications.

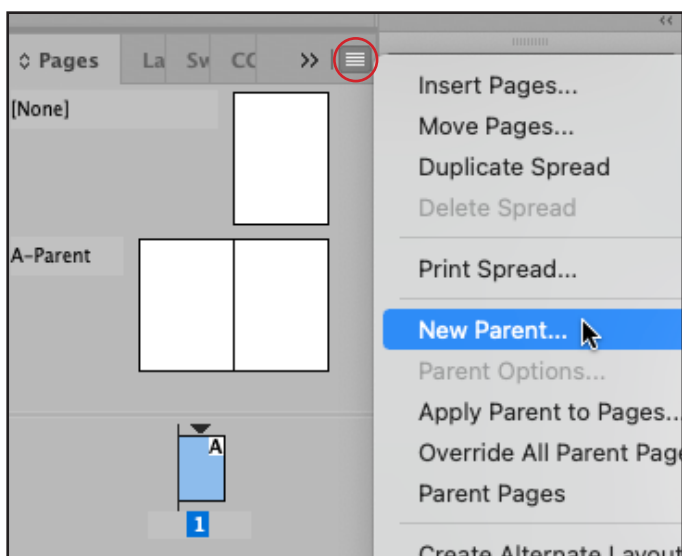
It is common for your multiple page document to have several different Parent Pages, each designed to handle the content in a different layout design.

1. By default you will start with two Parent Pages on any document you create in InDesign. They are *[None]* and *A-Parent* and can be found in the top section of the *Pages Panel*.

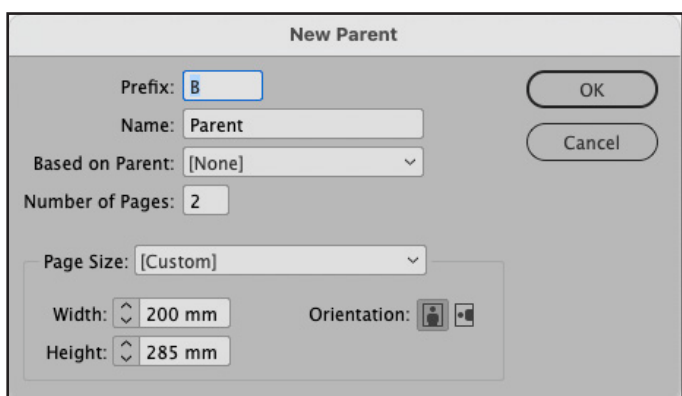


Every page in your document will be assigned to a Parent Page. The Default is *A-Parent* indicated by the *A* in the corner of the page.

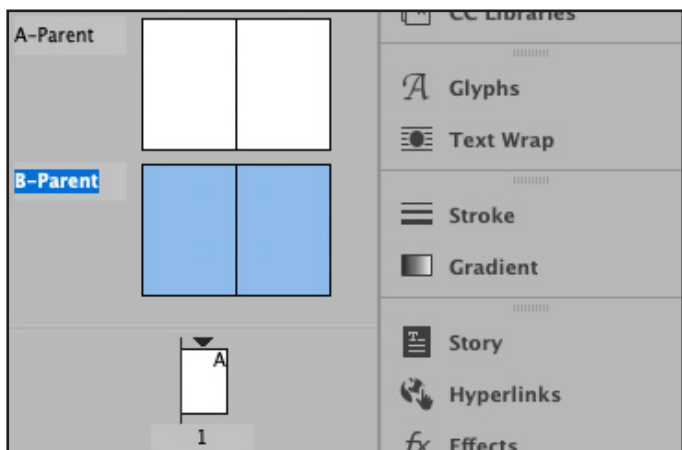
- To create a new Parent Page so that you can add a different layout design go to the *Pages Panel Menu* and choose *New Parent*.



- In the *New Parent* window you can set some basic settings like changing the name of the Parent Page to something more recognisable. Click *OK*.



- The new *B-Parent* pages have now appeared in the top section of the Pages palette with both pages selected, and will be what you now see in your working area.



It is really important to keep track of what pages are selected as this will determine if you are working on a Parent Page (adding structure and common elements) or a Document Page (adding content).

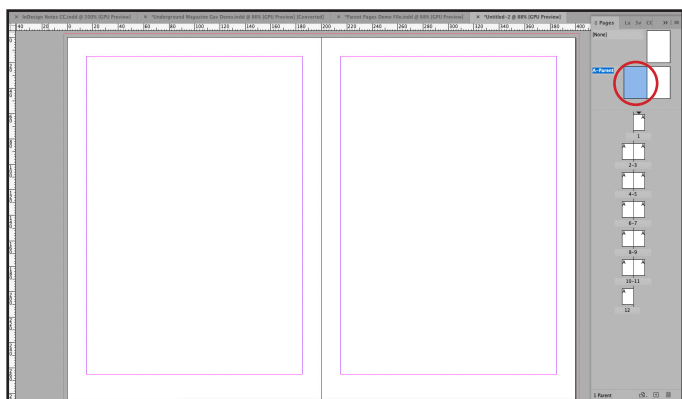
Adding Elements to Parent Pages.

If you have design elements that are to be common to your pages throughout your document you can add them via your Parent Pages.

The advantage of applying them via Parent Pages is that you know that each page element will be identical on each page that they appear.

In the following example I have created a document with facing pages (spreads) that has 12 pages all of which are assigned to the *A-Parent* page as default.

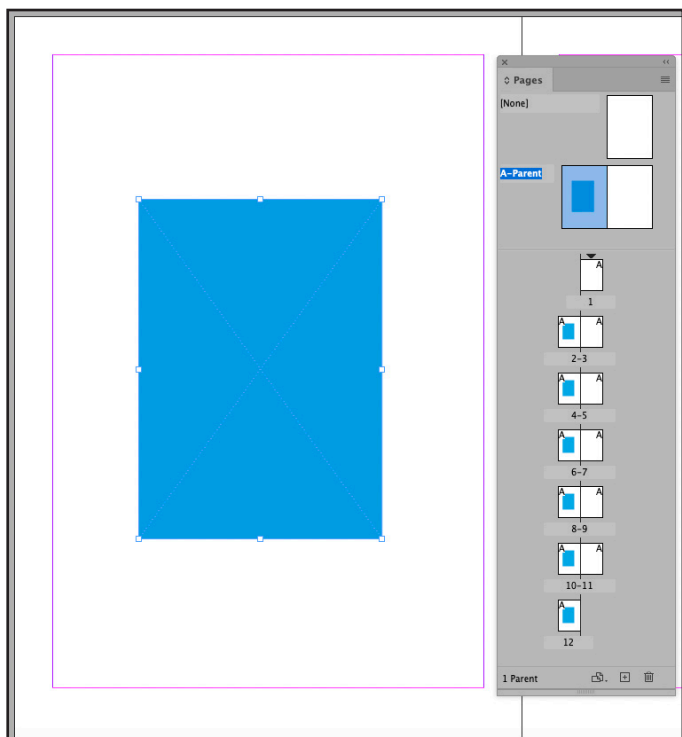
To follow along you can open the InDesign Template file *Parent Page Demo 01.indt*.



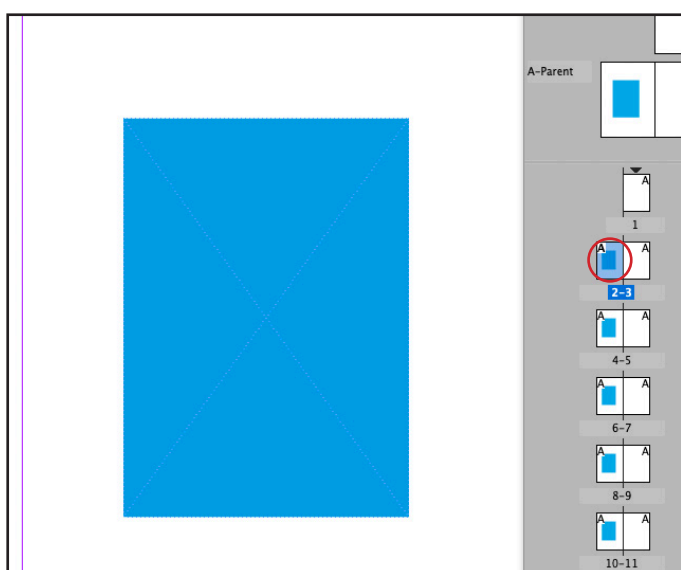
1. In the top section of the *Pages Palette*, double click on the *Left page* of the *A-Parent* spread to select it and make it appear in your working area.

Anything that we add to the selected Parent Page will appear on all document pages that it is assigned to.

2. Using the *Rectangle Frame Tool*, draw a box in the center of the left hand *A-Parent* page and add a fill colour to make it more visible.



The shape that you have added to the *A-Parent* page has now appeared on all of the assigned document pages.

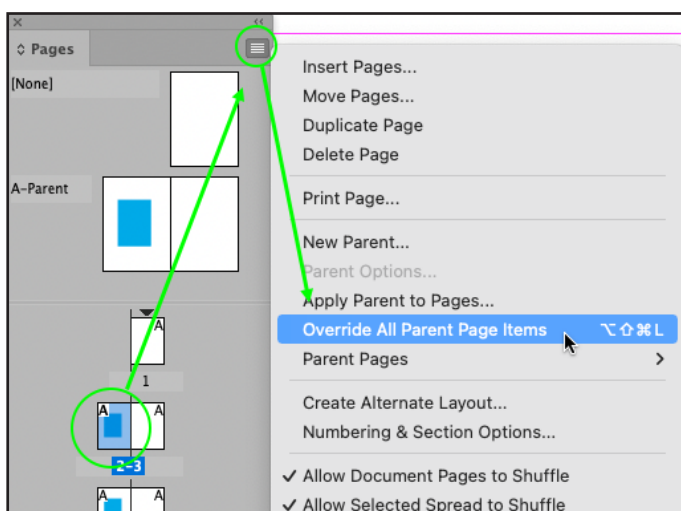


3. In the lower section of the *Pages Palette*, double click on one of the left hand document pages to select it and make it appear in your working area.
4. Use the selection tool (the black arrow) to try and select the shape on the document page. Can't select it?

By default, any items that are added to a Parent Page will appear as a locked item on the assigned document pages to protect them. However, they can easily be unlocked and edited.

Overriding Parent Page Items on Document Pages.

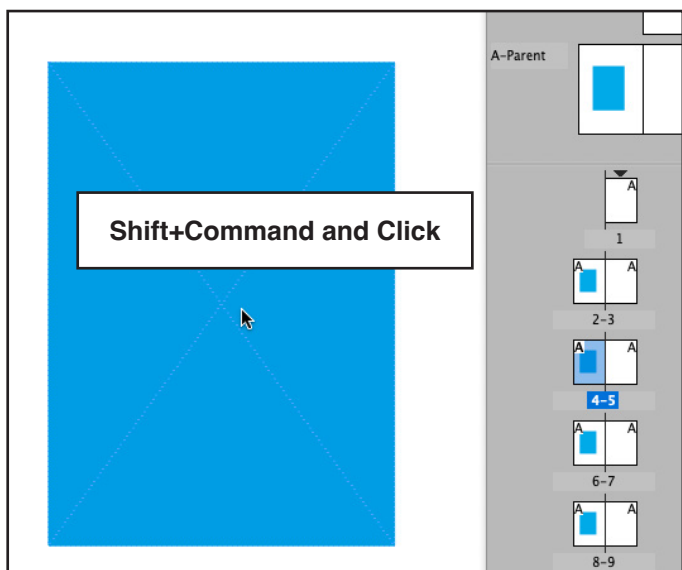
1. Make sure that you have the correct page selected in the *Pages Palette*.
2. From the *Pages Palette Menu* select *Override All Parent Page Items*.



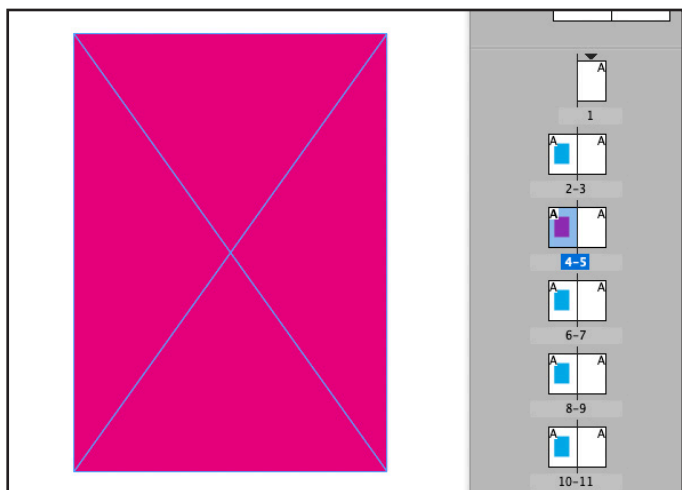
This will unlock ALL of the Parent Page items on the selected page.

It is also possible to unlock individual items one at a time. This is my preferred method.

3. Move to a different page that has a locked Parent item on it.
4. Using the Selection Tool (the black arrow), hold down *Shift+Command* and click on the item you want to unlock.



5. Now with the item unlocked you can make edits without effecting the other pages. In this example I have changed the colour to the box.



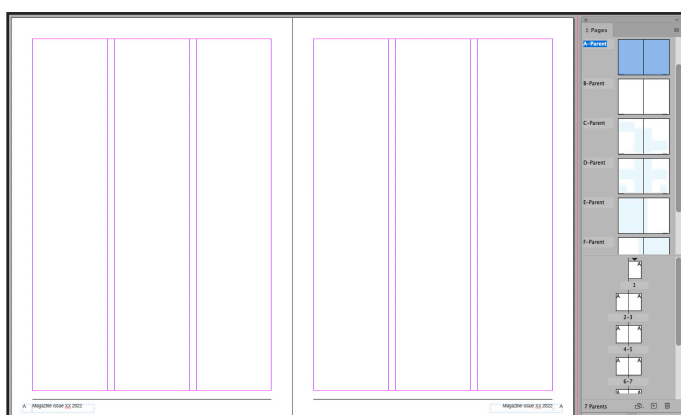
Assigning Parent Pages to Document Pages.

Assigning Parent Pages to your document pages is quite an easy process. The difficult bit is working out what items need to go onto the Parent Page.

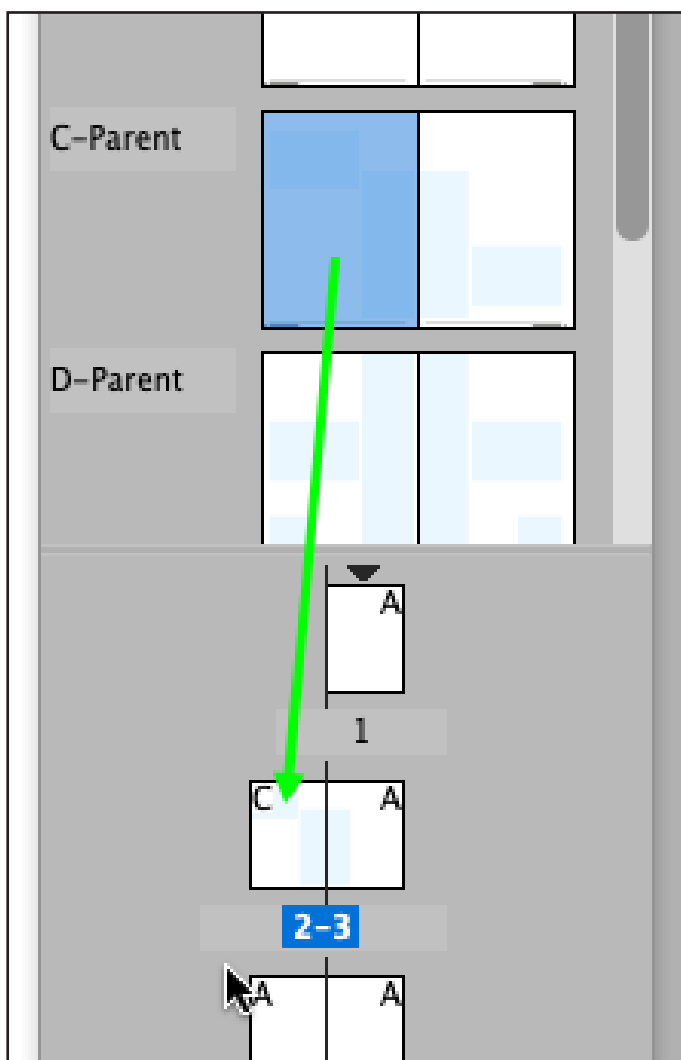
Spend a bit of time thinking about the common items that may need to go onto all of your pages. This may cover things like page numbers, issue number, and other common designed items. (Page numbering will be covered a bit later on in these notes).

You can even start to transfer basic layout structures from your sketches to your Parent Pages. Adding in columns, margins, and even image locations.

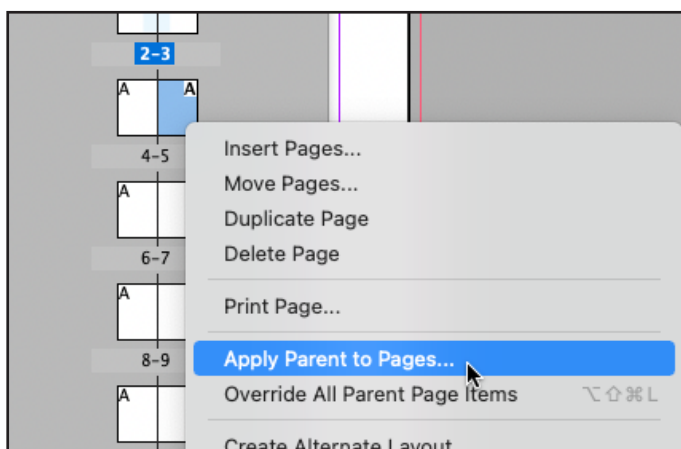
1. Open the InDesign file template *Parent Pages 02.indt*. This file has some basic ready made layouts that include page numbers and some image boxes that have been coloured in light blue so you can see them easier.



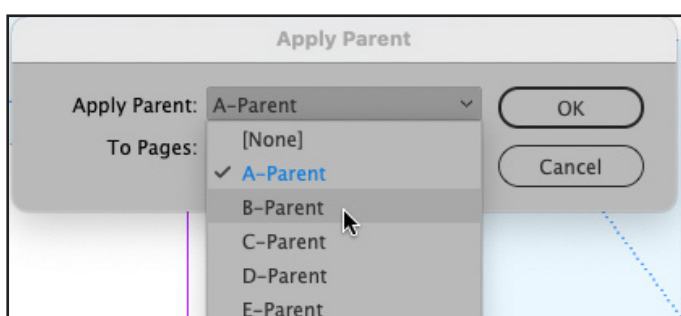
2. Take a moment to have a look at some of the different Parent Page layouts. Also, note that all of the document pages are assigned to *A-Parent*.
3. Choose the Left hand *C-Parent* page, and drag it to document page 2. This will assign the Left hand *C-Parent* page to page 2 of your document.



4. Drag other Parent Pages to some of the other document pages. You can mix and match different Parent Pages. However, as this document is set up for facing pages (Spreads) you need to make sure that you are dragging left pages to left pages and right pages to right pages.
5. You can also assign a Parent Page by *Right Clicking* on a document page and selecting *Apply Parent to Pages*.



6. Select your Parent Page from the *Apply Parent* menu, and click OK.



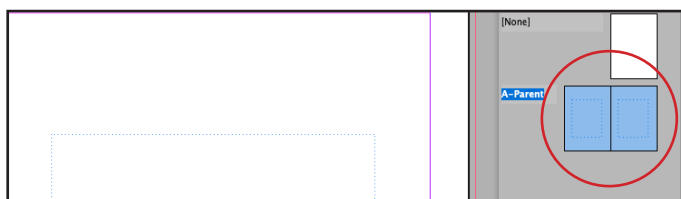
You can now go through the document pages and unlock the image boxes (Shift+Command and Click), add in images, draw in text boxes, and build some designs either using your own content or use the content from the Spiekermann workshop.

Adding Page Numbers.

It is best to add page numbers via the Parent Pages as it is most likely that you will want them on almost all of your content pages.

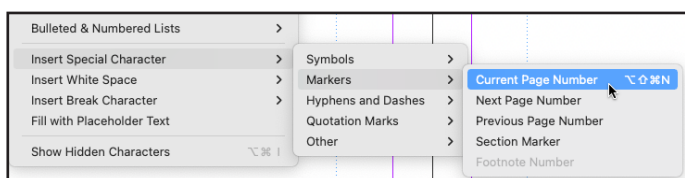
To follow along with this section you will need to open the template file *Page Numbers Demo 01.indt*.

1. With the template file *Page Numbers Demo 01.indt* open, double click on the *A-Parent* pages so they appear in your work area.

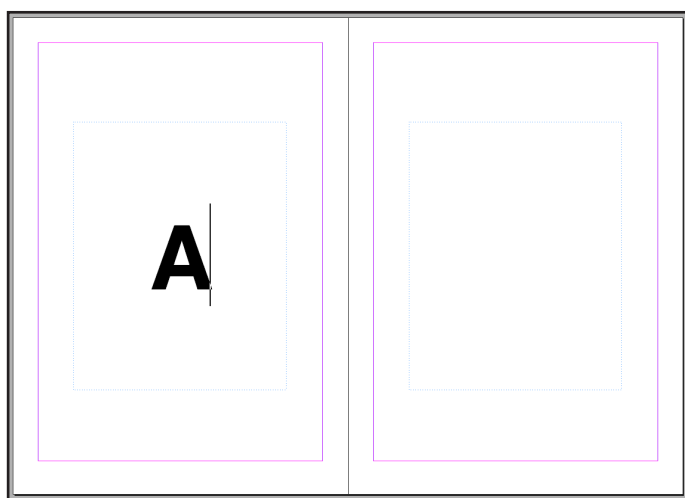


I have already added two large text boxes to the *A-Parent* pages so you can clearly see how the page numbers are being added. (Obviously you will be adding more subtle page numbers to your designs but the principal is the same).

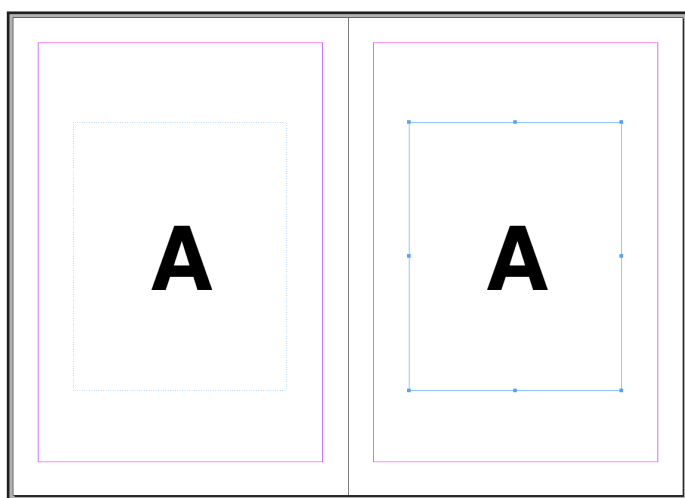
2. Select the *Type Tool* from the tools palette and click in the text box on the left hand Parent Page. You should see a blinking line in the centre of the box.
3. From the *Type* menu select *Insert Special Character - Markers - Current Page Number*.



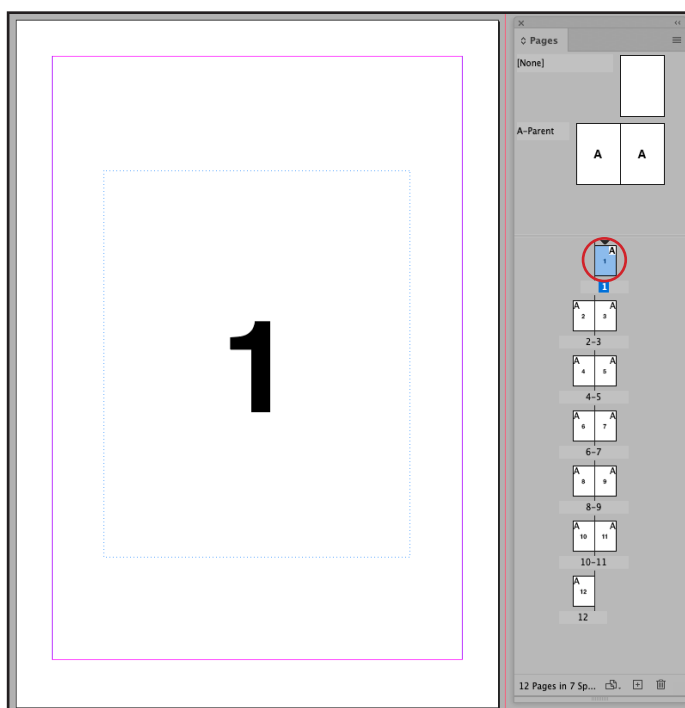
4. This will add a large 'A' to the left hand Parent Page. (The A relates to the *A-Parent* page. If this was done on a *C-Parent* page you would see a C).



5. Repeat steps 2 and 3 on the right hand page to add page numbers to all assigned document pages.



6. Double click on page 1 of the lower section of the *Pages Palette* so that you can see the document pages. As you scroll through the document pages you will now see that page numbers have been added to them.



Sectioning Page Numbers.

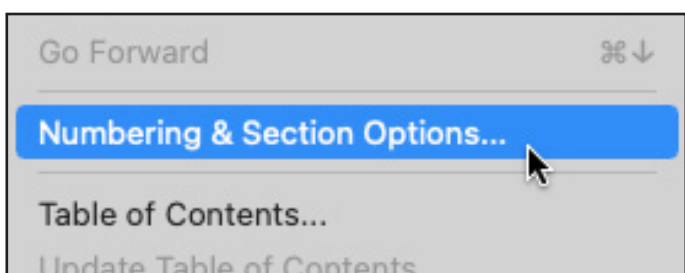
Depending on the type of document you are designing you may need to have page 1 appear several pages into the document. This is done by creating sections for your page numbers.

Note: when numbering pages, left hand pages are always even numbers, and right hand pages are always odd numbers.

1. Make sure that you have page 1 of your document selected in the *Pages Palette*.

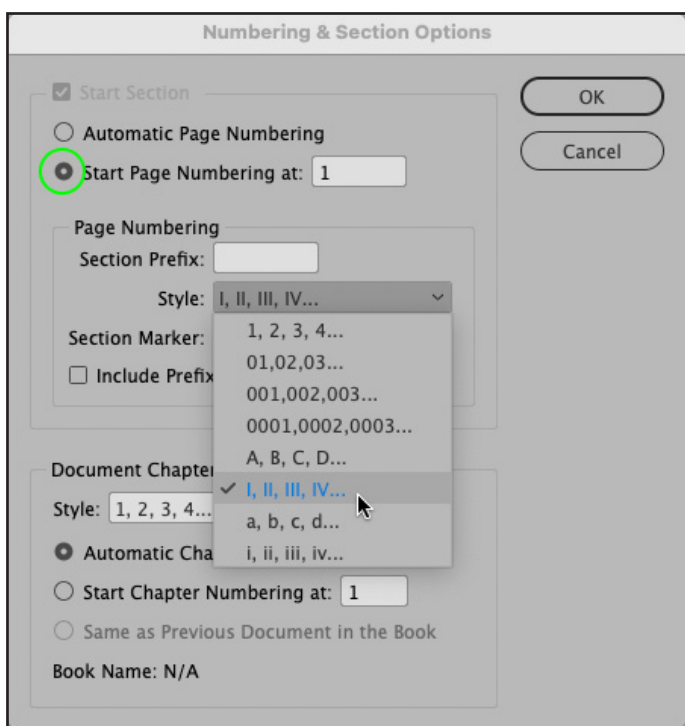


2. From the *Layout* menu select *Numbering & Section Options*.



3. In the *Numbering & Section Options* select *Start Page Numbering at: 1*.

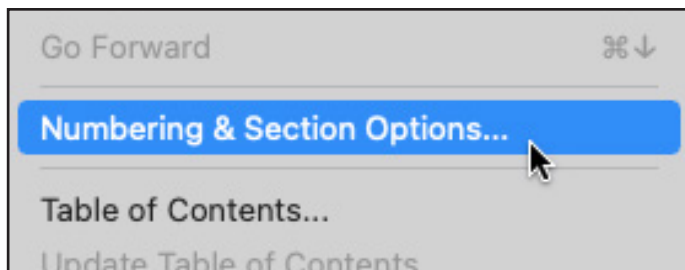
Then choose a numbering style from the *Style* section. I have selected uppercase Roman Numerals.



4. Click OK. This will change all of your page numbers to Roman Numerals.
5. To re-add the normal page numbering we now need to select the page we want it to start on. In the *Pages Palette* double click on page 5 (page V in Roman Numerals).



6. From the *Layout* menu select *Numbering & Section Options*.



7. In the *Numbering & Section Options* select *Start Page Numbering at: 1*.

Then set the numbering style back to numbers and click *OK*.

New Section

☒ **Start Section**

☐ Automatic Page Numbering

☒ Start Page Numbering at:

Page Numbering

Section Prefix:

Style: ▼

Section Marker:

☐ Include Prefix when Numbering Pages

Document Chapter Numbering

Style: ▼

☒ Automatic Chapter Numbering

☐ Start Chapter Numbering at:

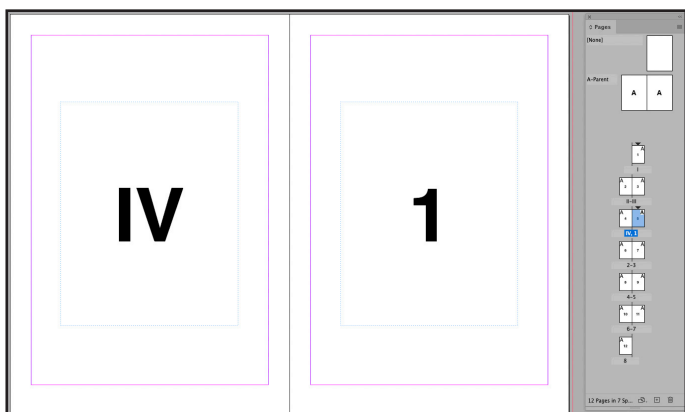
☐ Same as Previous Document in the Book

Book Name: N/A

OK

Cancel

8. You have now sectioned out the first four pages from the document page numbering and have set page 5 to be the new page 1.



Working With Style Sheets.

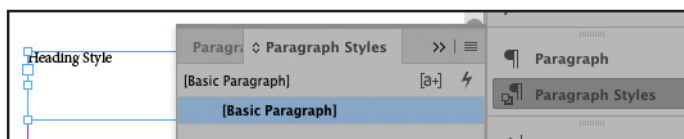
Using Paragraph and Character Style sheets is a great way to manage the appearance and consistency of your text within your InDesign documents. Especially when you need to repeat font and formatting appearances across your document be it over one or several pages.

As the names suggest, Character Styles control the appearance of the typeface in terms of Font, colour, size, leading etc. Paragraph Styles control the formatting of your areas of text, Alignment, indents, spacing after/ before paragraphs etc.

Paragraph Styles also allow you to embed a character style to the formatting that you are controlling.

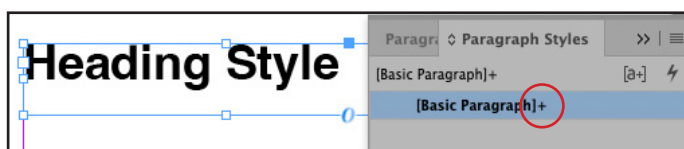
1. To follow along with these notes open the InDesign template file *Paragraph Styles.indt*.
2. If the *Paragraph Styles* palette isn't visible go to *Window - Styles - Paragraph Styles*.

By default all text that is added to a page is assigned to the [Basic Paragraph] style sheet. Which is Minion Pro, 12pt, in black.



Any changes that are done that move away from the [Basic Paragraph] style will show as a + next to the style sheet.

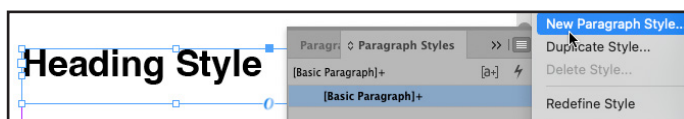
3. Change the text on page 2 to Helvetica Bold and the size to 36pt. A + can now be seen next to the [Basic Paragraph] style sheet.



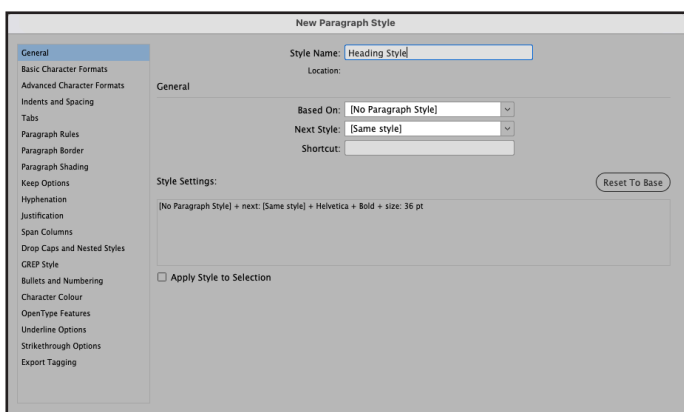
Creating a New Style Sheet.

Style sheets are really useful when you are wanting to have consistent type styles throughout your document. They also make it easier and faster to make document wide edits.

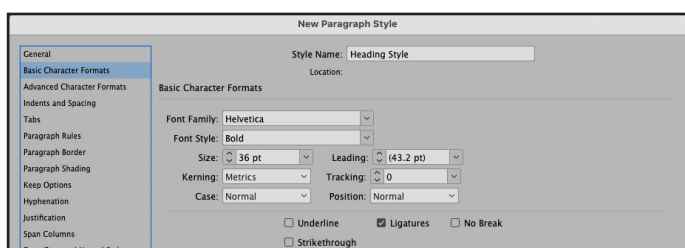
1. With the *Heading Style* text box selected go to the *Paragraph Styles* palette menu and select *New Paragraph Style*.



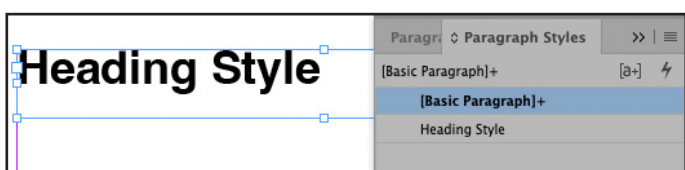
2. In the *New Paragraph Style* window you will have access to all the styling and formatting option you will need. Under the *General* options set the *Style Name* to *Heading Style*.



3. In the left hand menu, click on *Basic Character Formats*. Here you will see that the styles from the selected text box have been added into the various information fields. (Helvetica Bold, 36pt).



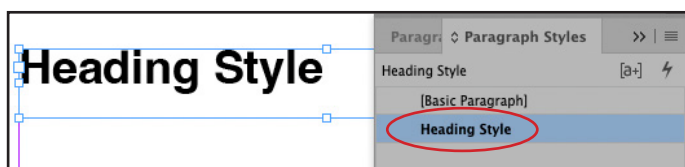
4. Click OK. You should now see a new style sheet called *Heading Style* in the Paragraph Styles palette.



Assigning a New Style Sheet.

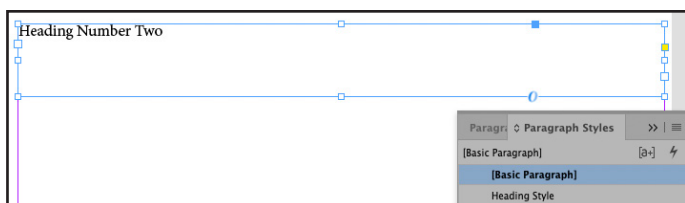
Now that we have created a new Paragraph Style sheet we still need to assign it to the text.

1. Still with the text box selected, click on the *Heading Style* style sheet to assign it the selected text.

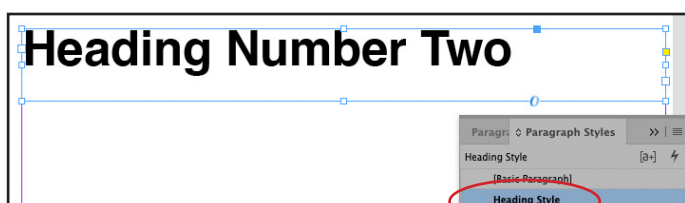


Although nothing has visually changed, we have linked the text to the correct style.

2. At the top of document page 3, type in *Heading Number Two*. The text should appear as the default Minion Pro.



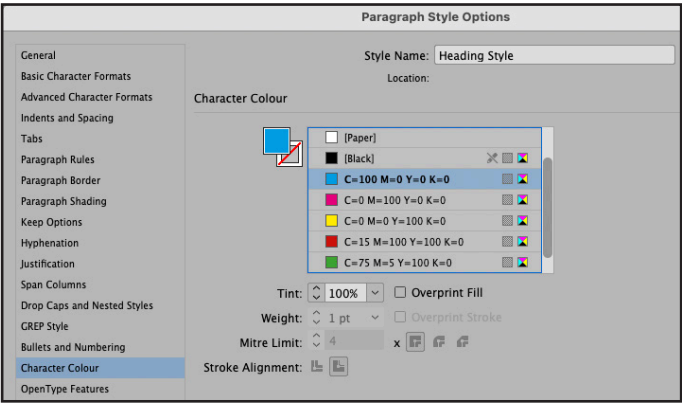
3. Either select the text by highlighting it or select the text box. Then click on the *Heading Style* style sheet to assign that style to the text.



Editing Style Sheets.

Style sheets can be edited to apply changes to everything that it has been assigned to. This is a handy way of applying changes to many parts of your design very quickly.

1. Double click on the *Heading Style* style sheet in the *Paragraph Styles* palette.
2. From the left hand menu, click on *Character Colour*



3. Click OK. The new colour will now be applied to every piece of text assigned to the *Heading Style* style sheet.

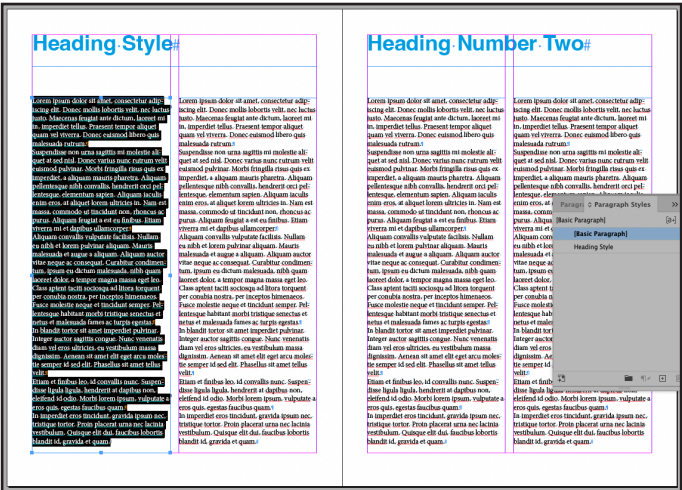


Style Sheets for Body Copy.

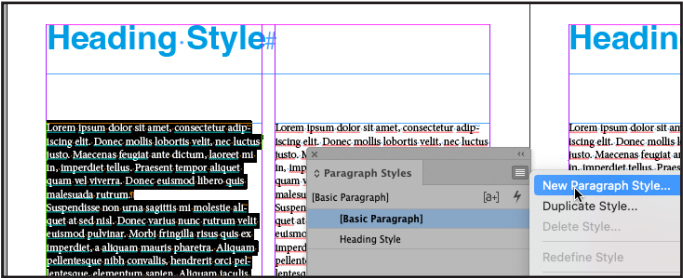
The same basic principals apply when you are working with Style Sheets for Body Copy.

To follow along open InDesign Template file *Paragraph Styles 02.indt*.

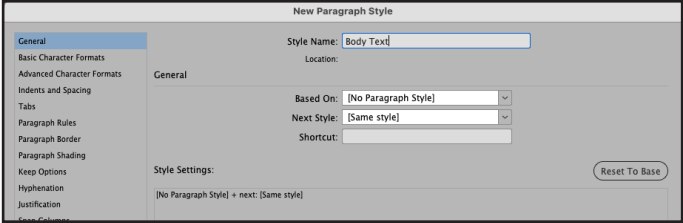
1. Once you open the *Paragraph Styles 02.indt* template file you will see that I have added four columns of text and they are all currently assigned to the [Basic Paragraph] style sheet.
2. Select all the text in the first column.



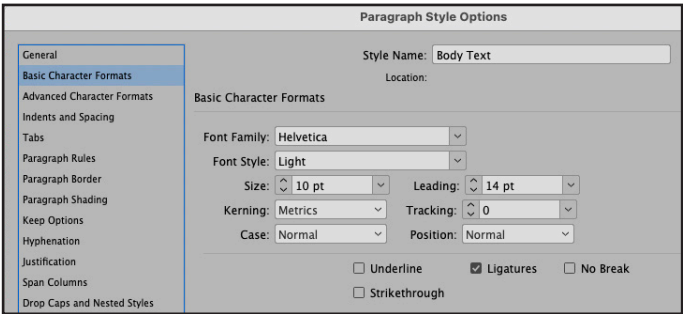
3. From the *Paragraph Style* palette menu select *New Paragraph Style*.



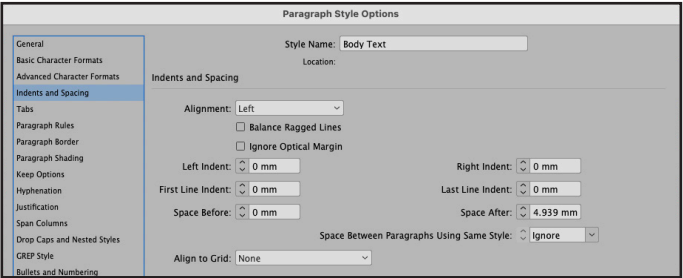
4. Set the *Style Name* to *Body Text*.



5. In the *Basic Character Formats* section set the following:
- Font Family: Helvetica
 - Font Style: Light
 - Size: 10pt
 - Leading: 14pt

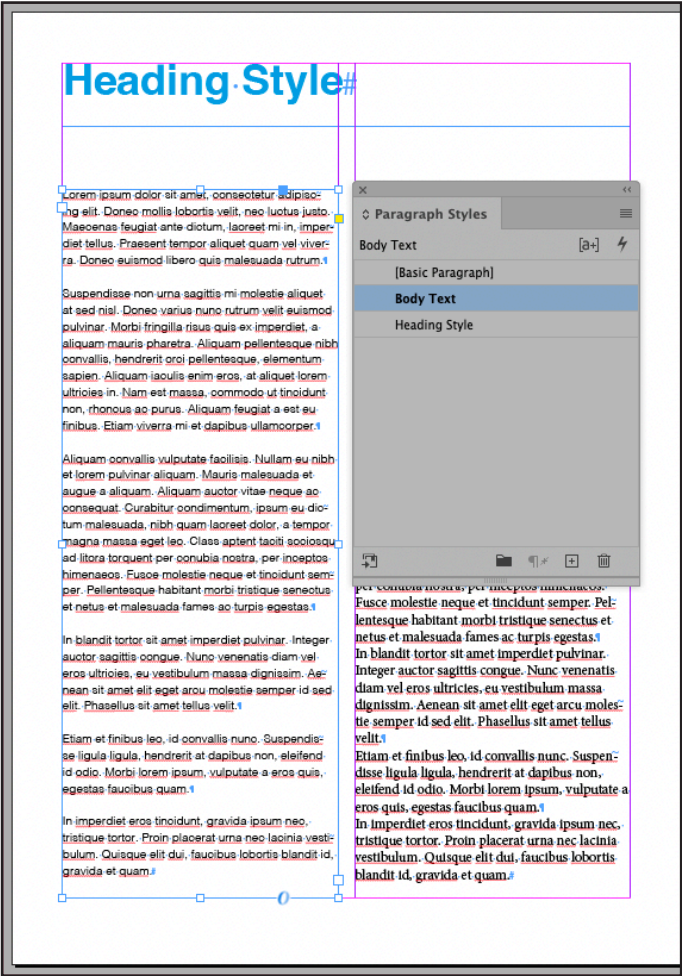


6. In the *Indents and Spacing* section set *Space After* to 14pt. You can select the 0 mm and type in 14pt and the software will convert it to 4.939 mm.

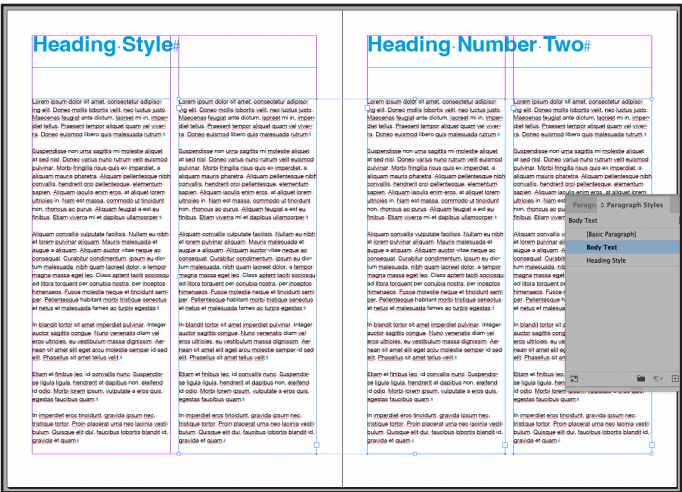


7. Click OK to close the window.

8. Still with the text in column one highlighted or the text box selected, click on the *Body Copy* style sheet to assign the styles to the text.



9. Select the other three columns of text and assign the *Body Copy* style sheet to them.



Now that all of the columns are assigned to the same style sheet take some time to explore editing the style sheet to see how you can apply changes.

Then start to think about the different bits of text in your magazine and how many style sheets you may need to make.

Working With Tabs.

Tabs enable you to accurately organise text in a linear format. Tabs are most commonly used to apply visual space between information without the use of a table. Tabs can be set to alignment Left, Right, Centred and Decimal Centred to improve the appearance of the information.

1. Open the file *Tabs01* from the *Tabs* exercise folder.

Table01 has tried to be formatted by not using Tabs. Instead the Space Bar has been used to try and balance the columns of numbers without much success.

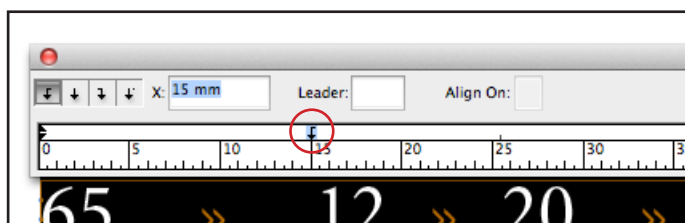
Table02 has been formatted with the default Tab measures. Each default Tab is approximately 12.75mm apart.

Setting Your Own Tabs.

1. Using the *Type Tool* select all the text in *Table 03*, then go to *Type - Tabs*.

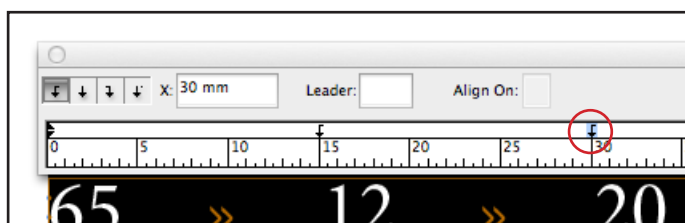


2. Make sure that you have *Alignment Left* selected. In the *X* data field enter *15mm* and press *Return* to apply your first Tab.



You will notice that a Range Left Tab marker has appeared in the rule above the selected text.

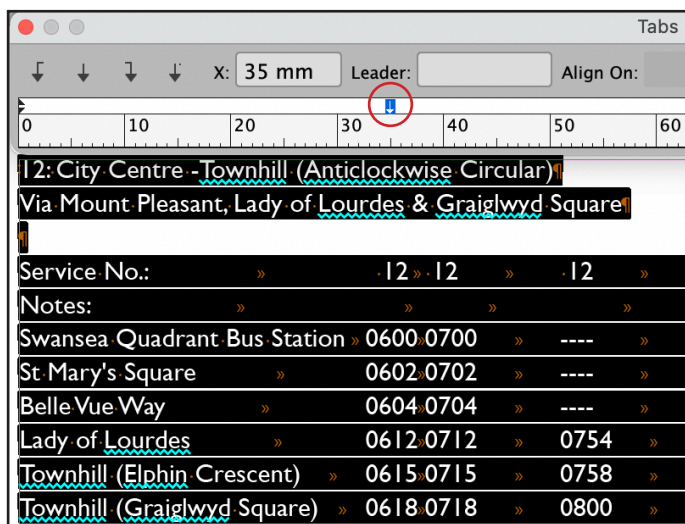
3. Click on the Tab rule near *30mm*. Then in the *X* data field enter *30mm* and press *Return* to apply your second Tab.



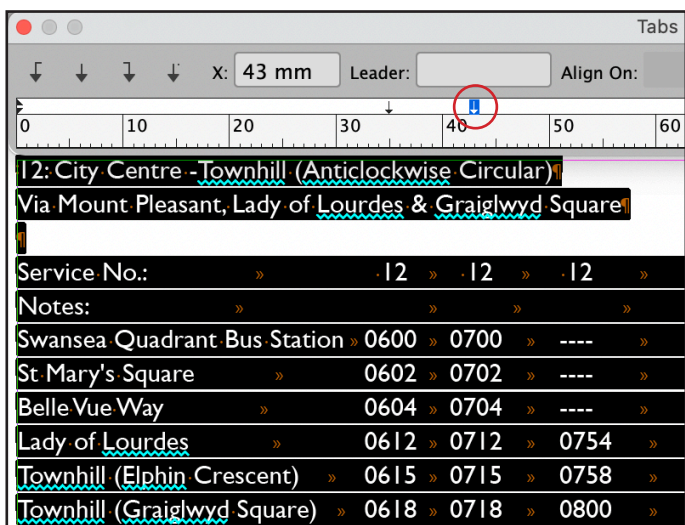
4. Repeat step 3 entering new Tab markers at 45mm, 60mm, 75mm and 90mm to format the text into well distributed columns.
5. Use *Table04* to experiment with different Tab alignments and spacings.

The Number 12 Bus Time Table.

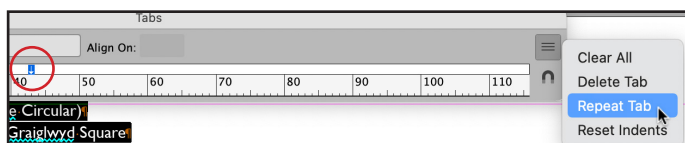
1. Open file *Tabs02*.
2. Select all the text and format as follows:
 - 7pt Gill Sans, colour Black.
 - 9pt Leading.
3. Still with the text selected, go to *Type - Tabs*.
4. In the Tab window
 - Tabs Set to Centred.
 - First Tab positioned at 35mm.



5. Set the second Tab position to 43mm.



6. Still with the second Tab highlighted, select *Repeat Tab* from the Tabs Palette menu.



Bulleted Lists and Sequential Lists.

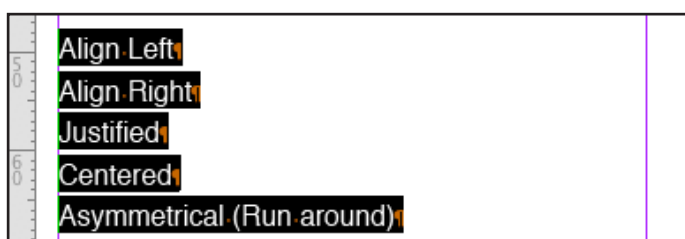
Working with bulleted lists and sequential lists has been made easy with InDesign. With the click of a few buttons you are able to quickly style up your lists.

For bullet and sequential lists the basic text that the list is to be made up of does not need to have the bullets or numbers as part of the text. InDesign will add these elements for you.

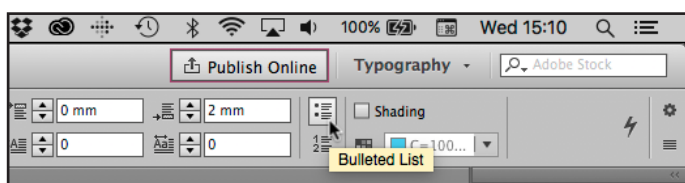
A quick note on using bullet points. The text that leads into the bullet points should end in a colon (:). If the information in the bullet points forms a list and not a full sentences then it can start with a lowercase character and have no full stop.

If the bullet point information forms a full sentence it should start with a capital and end with a full stop.

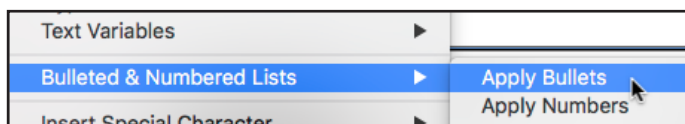
1. Open file *Lists.idml*. The file has three columns of text that need to be formatted into different types of lists, Bulleted, Sequential and Nonsequential.
2. In the *Bulleted List* column select the section of text as shown in this image.



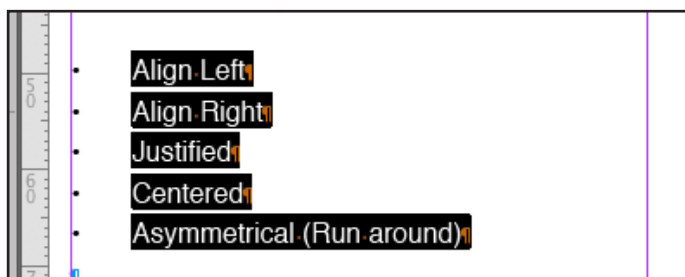
3. In the *Formatting Bar* at the top of the screen you should be able to see a small button for *Bulleted Lists*.



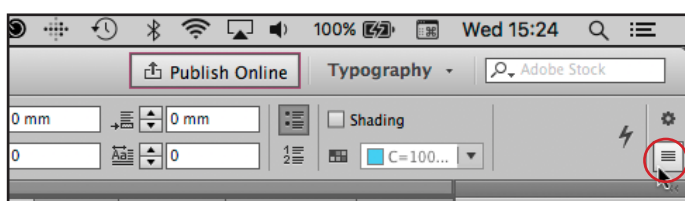
If you can not see the button you can go to the *Type Menu* and select *Bulleted & Numbered Lists - Apply Bullets*.



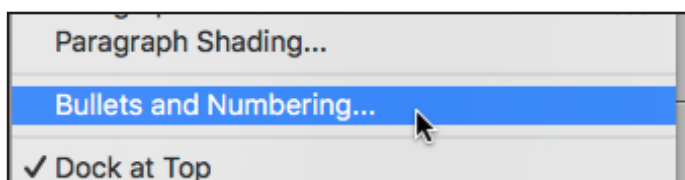
Either method will apply the default bullet points.



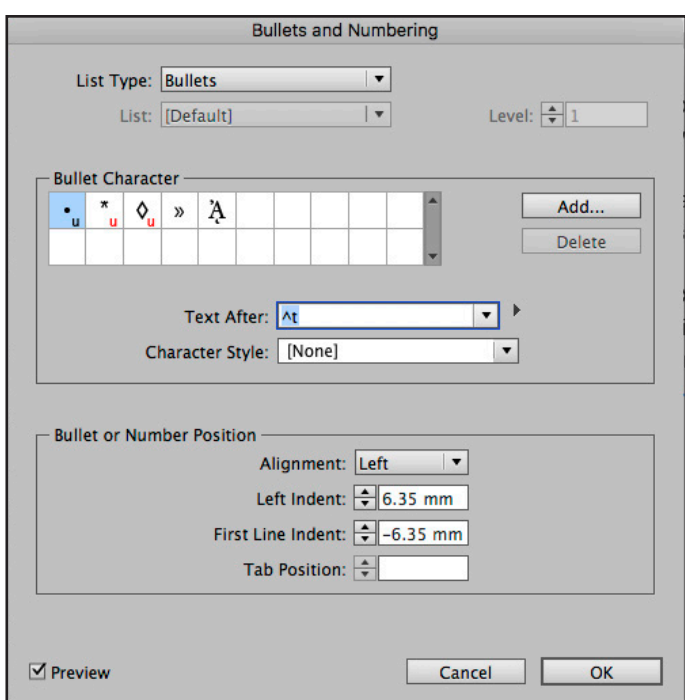
4. To adjust the distance between the bullet point and the text you will need to access the *Bullets and Numbering* palette. To do this go to the far right of the *Formatting Bar* and access the menu there.



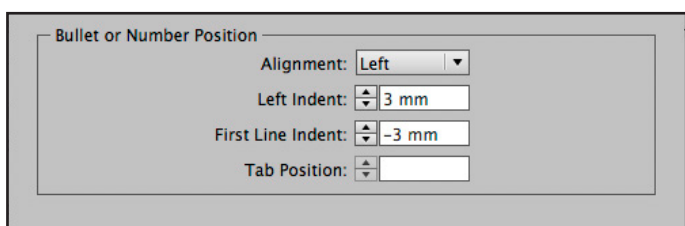
Choose *Bullets and Numbering* from the list. This will open the *Bullets and Numbering* palette so you can make your adjustments.



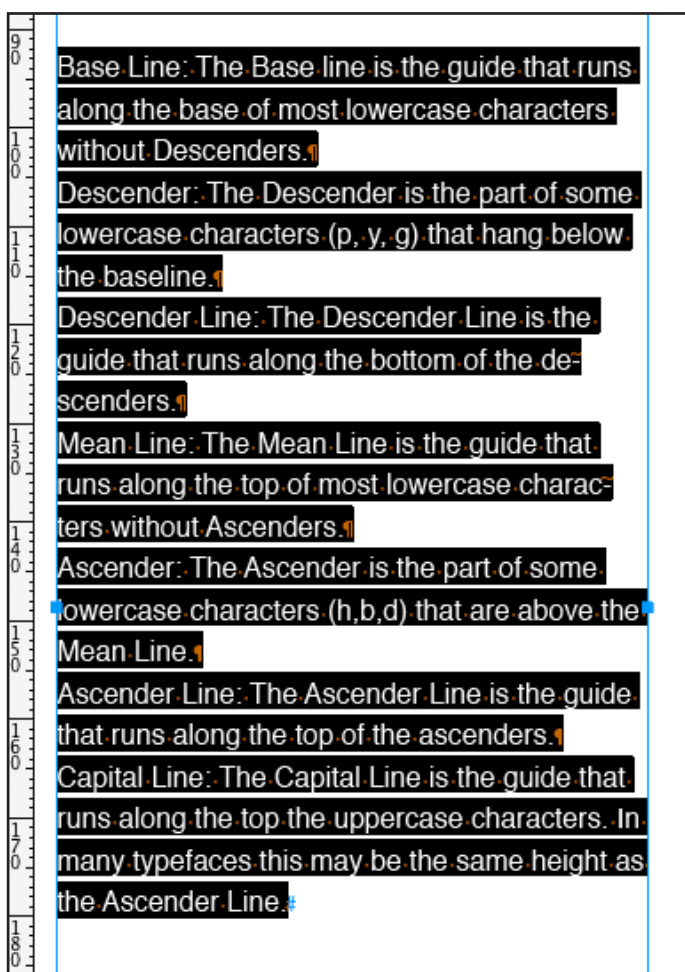
5. The *Bullets and Numbering* palette allows you to choose the type of list you are wanting to make as well as the distances and indents.



6. To make adjustments to the position of the bullets you will need to change the *First Line Indent* first then change the *Left Indent* otherwise you may encounter error messages. Set *First Line Indent* to -3mm and *Left Indent* to 3mm, then click OK.



- Now select the following text from the first column and repeat steps 1 to 6.

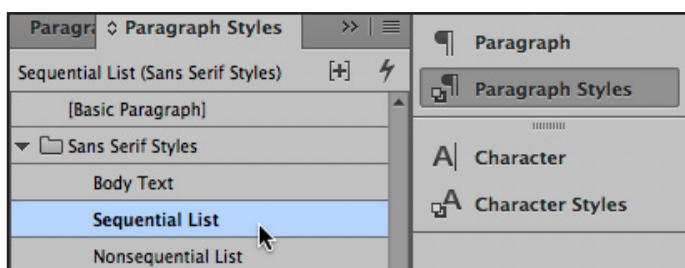


Making Lists with Style Sheets.

A more controlled way to apply a bulleted or sequential list is via a style sheet. This will help to ensure that all of your lists are formatted the same.

The second column of text in the *Lists.idml* has already had the text assigned to a style sheet that you are now going to format for a sequential list.

- From the *Paragraph Styles Menu* double click on *Sequential List* style sheet to open the *Paragraph Styles* palette.



- Now choose *Bullets and Numbering* from the list on the left hand side of the *Paragraph Styles* palette.



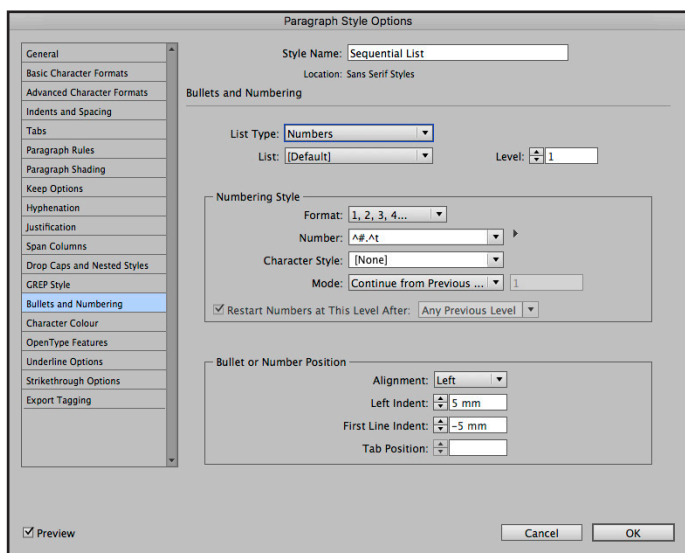
3. Set the following:

List Type: *Numbers*

Left Indent: *5mm*

First Line Indent: *-5mm*

Then click *OK*.

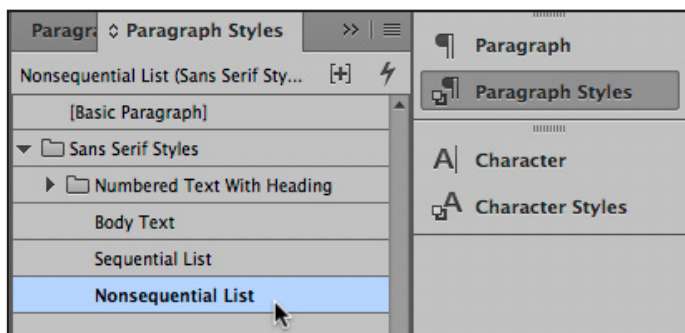


These changes will now have been applied to all bits of text that are linked to the *Sequential List* style sheet.

Nonsequential Lists.

Not all numbered lists that you will be wanting to create will be sequential. More often than not things like contents lists for books and magazines will be nonsequential in their numbering. This is how to apply a nonsequential list using style sheets.

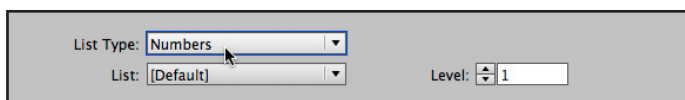
1. From the *Paragraph Styles Menu* double click on *Nonsequential List* style sheet to open the *Paragraph Styles* palette.



2. Now choose *Bullets and Numbering* from the list on the left hand side of the *Paragraph Styles* palette.

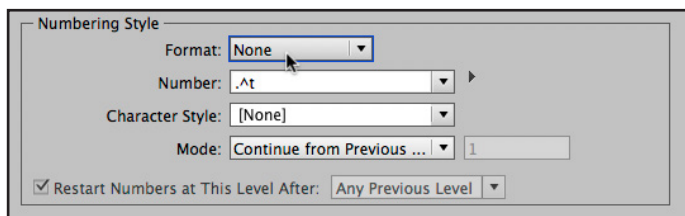


3. Set *List Type* to *Numbers*.



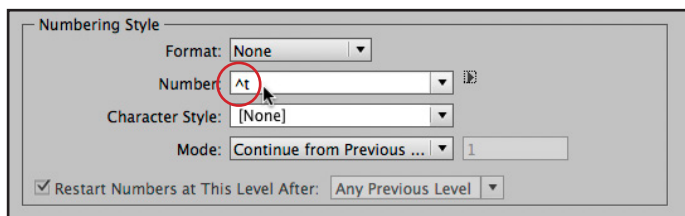
A screenshot of the 'List Type' and 'Level' settings in Adobe InDesign. The 'List Type' dropdown is set to 'Numbers'. The 'List' dropdown is set to '[Default]'. The 'Level' spinner is set to '1'.

4. Set *Format* to *None*. This needs to be set to *None* because the nonsequential page numbers have already been added to the text that is being formatted and you don't want InDesign to add the extra numbers.



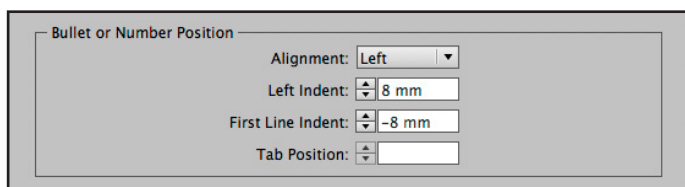
A screenshot of the 'Numbering Style' dialog box in Adobe InDesign. The 'Format' dropdown is set to 'None'. The 'Number' field contains '.^t'. The 'Character Style' dropdown is set to '[None]'. The 'Mode' dropdown is set to 'Continue from Previous ...'. The 'Restart Numbers at This Level After' checkbox is checked, and the dropdown is set to 'Any Previous Level'.

5. In *Number* remove the *.* (full stop) so it reads *^t* only. Removing the full stop allows the tabs that have been added to the text to set the formatting distance.

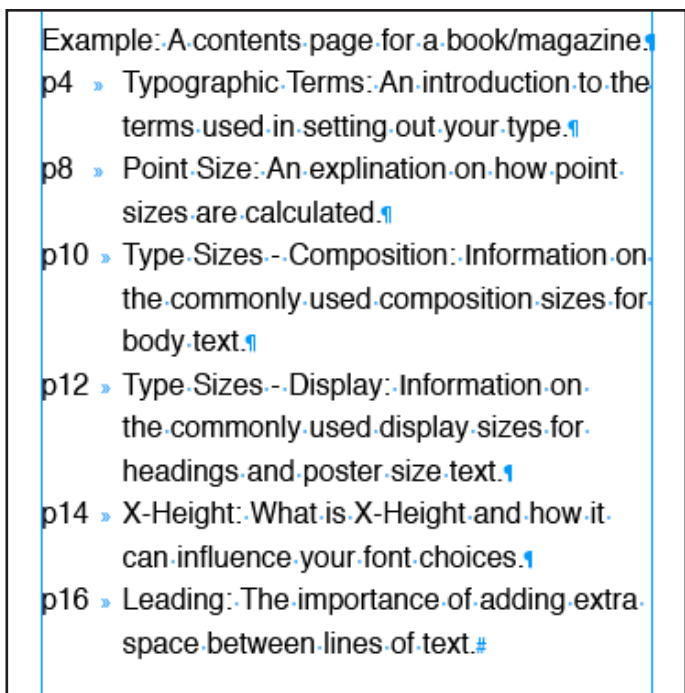


A screenshot of the 'Numbering Style' dialog box in Adobe InDesign. The 'Format' dropdown is set to 'None'. The 'Number' field contains '^t', with the leading dot removed. The 'Character Style' dropdown is set to '[None]'. The 'Mode' dropdown is set to 'Continue from Previous ...'. The 'Restart Numbers at This Level After' checkbox is checked, and the dropdown is set to 'Any Previous Level'.

6. Then set *Left Indent* to *8mm* and *First Line Indent* to *-8mm*. Click *OK*.



A screenshot of the 'Bullet or Number Position' dialog box in Adobe InDesign. The 'Alignment' dropdown is set to 'Left'. The 'Left Indent' spinner is set to '8 mm'. The 'First Line Indent' spinner is set to '-8 mm'. The 'Tab Position' spinner is empty.



A screenshot of a table of contents page in Adobe InDesign. The page contains a list of items with page numbers and titles, formatted with blue text and a blue border. The items are:

- p4 » Typographic Terms: An introduction to the terms used in setting out your type.
- p8 » Point Size: An explanation on how point sizes are calculated.
- p10 » Type Sizes - Composition: Information on the commonly used composition sizes for body text.
- p12 » Type Sizes - Display: Information on the commonly used display sizes for headings and poster size text.
- p14 » X-Height: What is X-Height and how it can influence your font choices.
- p16 » Leading: The importance of adding extra space between lines of text.