[02] **InDesign**

Instructor: David Mans *Location:* Higgins Hall South 111 *Date:* 15/02/07 Time: 12:00-3:00 p.m.

1.0: Brief

This workshop, will serve an introduction to structure Styles and Templates in Adobe InDesign.

The session is a comprehensive hands on exploration of Indesign with a focus on setting up a well structured Portfolio template. The takeaway being an understanding of the InDesign capacity to integrate linked styles, unified templates, formatting automation, and flexible document organization, for the creation of developable presentations and booklets.

2.0: Prerequisites

Adobe Indesign:

- http://www.adobe.com/products/indesign.html

The following document assumes a PC version of InDesign CC 2014. All concepts are valid for mac version as well, however names, locations, and appearance may change.

3.0: References/ Resources

- [3.1] Document Setup:

Lulu:http://www.lulu.com/home
- Page Format Sample: http://static.lulu.com/cmsmedia/bookbuilder/templates/1073.zip
- Indesign Job Options: http://connect.lulu.com/lulu/attachments/lulu/interior_formatting%40tkb/36/2/Lulu.joboptions

Blurb: http://www.blurb.com/
- Adobe Plugin: http://www.blurb.com/bookmaking-tools#adobe

- [3.2] Fonts

Fonts: https://www.google.com/fonts
- http://www.fontsquirrel.com/
- http://www.dafont.com/
- http://www.fontspace.com/

Install PC: http://windows.microsoft.com/en-US/windows-vista/Install-or-uninstall-fonts
Install MAC: http://www.fontspring.com/support/installing/how-do-i-install-fonts-on-my-mac

- [3.3] Graphics & Color

ASE Creation/ Download: https://color.adobe.com/
- http://colrd.com/

- [3.4] CMYK & RGB
- http://en.wikipedia.org/wiki/RGB_color_model
- http://en.wikipedia.org/wiki/CMYK_color_model
- http://visual.ly/rgb-vs-cmyk

4.0: Notes

[4.1] Document Setup

01: Means of Publication/ Promotion

- The following services are three of the most used sites for the production of digital and physical publications. All three are very simple to use in conjunction with indesign and allow the uploading of PDF's as the digital input for the printing process. While Blurb and Lulu offer similar services for physical printing each has its advantages, while Issuu also offers physical publishing its strength is in digital presentation. These days your brand presence as a designer is essential in distinguishing what makes you as a designer unique from an oversaturated market. A professionally printed and bound portfolio makes a huge impression and can cost less in the end than the ink, photo paper, and binding that goes into doing it yourself. Not to mention the time lost in the process.
    - **Blurb** is the consumer standard in self publication. It allows uploading of pdf's for physical and digital publication & distributions. The strength of blurb is the quality and range of sizes in its hardbound covers and ease of process. Additionally it offers a series of tools for promoting publications as well.
    - **Lulu** provides the ability to manage multiple booklets and customize both media type as well as format size and binding based on your desire. The most common setup for a architectural portfolio would be full color, perfect binding with a softbound cover. The advantage with Lulu is cost and ease of upload via pdf for softcover books as well as a large range of media sizes.
    - **Issuu** is a very simple to use and clean looking service for the display and distribution of online publications. It takes a pdf, ideally formatted for book publication and displays it in an easy to navigate lightbox style viewer which allows fast and clean browsing and interacting with the content. This is a great way to display documents as an alternate/ complement to the 5 mb emailable pdf.

02: Output Destination & Units

- Before opening any documents you can set the units in InDesign to the unit type you are comfortable with. The default setting is the common publication standard of points & picas, or if you are working in a digital output type, pixels. This can be switched for publication by going to **Edit>Preferences>Units & Increments** and setting the **Ruler Increments** to your preferred unit in the **Horizontal** and **Vertical.**
- Indesign can work in both RGB and CMYK and should be set accordingly. In indesign this is individually on a per page basis and can be changed by going to **Edit** > **Transparency Blend Space** which should be RGB for digital content and CMYK for print. However unlike photoshop this does not change the original images referenced into the document. This can also be set under the export options.
    - CMYK
        - a subtractive color model = the higher the value to closer to black
        - Physical: printmaking, silkscreening, desktop printing, plotting.
        - Basically: Things that reflect light
    - RBG
        - an additive color model = the higher the value the closer to white
        - Digital: Projector, Monitor, Television, (mac, windows, web)
        - Basically: Things the emit light

- The first step in setting up a documents is determining the output type. Use the **Intent** dropdown to choose what type of platform you are producing for
    - **Web**, which is geared towards making content for the internet and will provide common resolutions with this medium in mind. This will also switch your units to pixels, as only the number of pixels matter on this platform, turn off spreads, as it assumes you are making single “slides”, and remove bleed and slug as they do not relate to digital output.
    - **Digital Publishing** will limit the options and switch to pixels based on the same basic requirements of a digital platform, but will provide new basic options for resolutions reflecting several common device resolutions
    - **Print** will set up the document in your chosen units, most likely, points, pica’s, or in more commonly understood metrics, inches or mm. Additionally it will open the options for specifying bleed, as well as default set the document for spreads, with the assumtion of a booklet . The options for media size will reflect a wider range of common physical output types. If you are planning to print your document, this is where you want to begin.
- Note, that either preset can be output to print or digital, as discussed later in this document, these settings are purely about specifying the target media type.

03: Media Size & Orientation

- Once you have determined your output type the first step in defining your actual document is to specify the **Page Size** in width and height. This can be determined by either your target print size, or by selecting a predetermined size from one of the publication companies listed above.
- If your width and height vary, you can switch potential orientation by switching between **landscape**, longer in the horizontal, and **portrait** longer in the vertical.
- When creating a new document you have the option to create facing pages under the new document window, also found under **File > Document Setup > Facing Pages**. If desired output is to be a booklet, then you would want facing pages turned on so your document will be organized around two adjacent pages. This is important not just for visual clarity, but to access the options for inside and outside settings of options like margins, bleed, and text. Recognizing that your physical booklet will have a spine, the center of the book is always going to be treated differently than the outside edges.

04: Margins & Bleeds

- When physically publishing a booklet be sure to set and test the **Margins** and **Bleed** lengths.
    - **Margins** will change from one media type to another. A printout , 11x17 or 8.5x11 for example should have a margin of around .5 inch on all sides, whereas a bound book should have the same margin on the outside edges, but a 1.5 to 2x margin at the binding to account for the fold in the book.
        - Margins are important parts of physical publishing as the process of cutting the final booklet size from the printed sheets is not always precise and space needs to be left to allow for some play in the production process.
        - Margins are also fundamental graphic elements in a layout in that they provide a perceptual space between the edge of the page and the content, letting the eye view the entirety of the image are text without slipping off the document.
        - Digital margins will vary depending on the output type where images may want to go full bleed more often, but text will still need to be held away from the edge for legibility.
    - **Bleed** is essentially additional space provided beyond where the edge of the page is

desired to be for which are meant to go all the way to the edge of the paper. This is called a bleeding, or if it challenges all edges of the page, full bleed image.
    - This Bleed space is meant for physically printed media such as booklets or posters to account for the slight discrepancy that will arise from the cutting process. This error is commonly around 1/16" from a professional print company. But it is recommended that you give at least 0.25 " bleed on all types of media.
    - Bleed is not really needed for digital output, as an export will be precisely to the pages edge, but is recommended to keeping the event that formatting is switched to a print.
- Bleed can be changed at any time by going to **File > Document Setup** while Margins can be changed by going to **Layout > Margins and Columns**.

[4.2] Font/ Paragraph Styles

01: Fonts

- When establishing a new document, font plays a critical role in expressing the design direction of the publication as a curatorial document of ones work. The selection of the font is as much a participant in the character of a document as layout, graphics, and color are as it the primary means of presentation for publication specific information.
- The search for an appropriate font should not be limited to the the fonts that come with a pc or mac. There is a universe of font options available for free and for purchase on several website, a few are listed above.
- When **downloading a font from the provided websites** the font files will usually come in a compressed archive ZIP or RAR file. Often this archive file can be dragged into the C:\Windows\Fonts folder and will automatically install. However this may not always be the case. Copying and pasting the font files from the open ZIP or RAR folder will often allow valid font files to be installed. In the event this does not work, create a new folder on the desktop or in the documents and drag or copy the font files to this new location first, then drag them from this location to the \Windows\Fonts folder. This will first decompress the files and may allow windows to successfully install them. Once this is done you can delete the temporary folder and its contents
    - Note: Be sure to only drag and drop or install valid font files. When downloading custom fonts many archive files (ZIP & RAR) may contain .txt or other files with decriptions or samples of the fonts. These are not valid font files and will be rejected by windows, sometimes causing a install to fail.
    - Valid font types have the following extensions, (.tt) TrueType, (.t1) Postscript Type 1, (.otf) OpenType. There are other extension types, but these are the most common. see: http://www.adobe.com/type/browser/info/formats.htm
- For troubleshooting on font installations see:
    - Windows Install Method: http://windows.microsoft.com/en-us/windows-vista/install-or-uninstall-fonts
    - Drag and Drop Method: http://help.adobe.com/en_US/indesign/cs/using/WSa285fff53dea4f8617383751001ea8cb3f-6e29a.html
    - Mac Install Method: http://www.guidingtech.com/6437/how-to-install-new-fonts-in-mac-os-x/
    - Drag and Drop Method: http://help.adobe.com/en_US/indesign/cs/using/WSa285fff53dea4f8617383751001ea8cb3f-6e29a.html

02: Character Styles

- The character styles can be thought of as graphic standards for the appearance of the individual

letters or characters in a text body. This method is ideal for unique overrides in the document, however a combination of paragraph styles and objects styles have greater benefits when combined with Master page structures. However, they settings described for the character styles are the same in the paragraph style, so they will be covered here.

- A well structured document should contain few font families, 2-3, whose properties are manipulated to create diversity in presentations, while the limited families create graphic continuity across the document. As such, tiering, or creating parent child relationships between any style in InDesign is an essential technique to maximize later document flexibility while guaranteeing continuity. Along these lines creating a top level character or paragraph style which only specifies the font family, give the flexibility to create a range of child styles which will diversify the expression of this font, while allowing for a single place to change the entire font family at a later point.
- **Character styles** can be set by going to **Windows** > **Type & Tables** > **Character Styles** in CS4, **Windows** > **Styles** > **Character Styles** in CS5 & 6.
- Create a new style and Set the font and basic characteristics for the document in this first style. When creating new styles set them to be **Based On** that first style in the **General** parameters. Think of them as children of this parent font style, which will inherit whatever was set up in the parent layer, font, size, etc. unless locally overridden. In this way if one of the child styles only changes the font size but leaves everything else as is, if the parent font is changed from times new roman to arial, all the fonts that are based on it will also update, creating variable consistency throughout a rich document set. Character Styles should be used to set the following parameters:
    - General Style Settings
        - **Based On** is used to inherit properties from another style. Any aspect of the style that is not overridden locally will be used.
    - Basic Character Formats
        - **Font Family is the primary** determinate of a document character. There should be two Parent font types for any document, a graphic font used to give design character to large concepts, titles etc., part of a branding identity, and a body font which is a separate font type selected for legibility, but in the same visual style of the graphic font, ex. rounded square, serif, etc. (***The selection of font should be set up as the parent style with just this attribute***, ***all children styles should inherit and modify the properties of this family***. This makes it easy to change your document look with one setting)
        - **Font Style** should be setup for each child style to create distinct character. A title may be bold, while a subtitle may be italic, body font should always be regular, but a notation font maybe italic and underlined.
        - **Size** is a key factor, a good font set should have no more that 3-5 Sizes.
        - **Case** can be used to control document consistency, for examples, you may set a rule that titles are always all uppercase, and this setting with force the text to be so.
    - **Character Color** is used to set the color of the text. Be careful to assign the color to the fill, not the stroke unless intentional. And even this, it is rare that an outlined font is legible. Note: Character color choices are inherited from the documents colors.
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03: Paragraph Styles

- Paragraph styles should be thought of as over the appearance of the body of the text, spacing, paragraph alignment, bullets, hyphenation. There are many overlaps between character styles and paragraph styles and settings which will be common throughout the length of a document should be be specified with paragraph styles, while unique cases should be overwritten with character styles.
- Paragraph styles should use the same parent child structuring as character styles to maximize document efficiency. Below are several additional options paragraph styles offer on top of the options that are shared by character styles. Note, only fundamental options are listed, not all

settings are described below, be sure to experiment with additional options.

- **Paragraph Styles** can be set by going to **Windows** > **Type & Tables** > **Paragraph Styles** in CS4, **Windows** > **Styles** > **Paragraph Styles** in CS5 & 6.
    - General Style Settings
        - **Based On** is used to inherit properties from another style. Any aspect of the style that is not overridden locally will be used.
    - Indents and Spacing
        - **Alignment** set the horizontal alignment of the text in a paragraph as well as how it will fill out the frame per line. Left for example should always be used for body text, but Left Justified can be used to extend each lines text to the far right side of the text box to hold a nice clean edge when next to white space, rather than a jagged edge. However, if this body of text is adjacent to an image or other graphic block this may not be needed as the edge is already held.
    - Hyphenation
        - **Hyphenation** is the condition where a word that does not fit on a line is split and continued on the next line with a dash placed at the end of the first lines half of the word. As a general rule of thumb in an architectural board or presentation where an entire pages content does not consist of text, this should be turned off. It makes reading short lines of text difficult.
    - Bullets and Numbering
        - **List Type** allows the selection either a bullet or number line prefix and indentation. Selection of either option will bring up the ability to select from the dropdowns below, what the appearance of the bullet, or the text formatting, leading zeros, etc. will be. Both can be font dependent.

[4.3] Graphics & Object Styles

01: Colors

- Colors within a document can be assigned locally or shared between multiple documents and software packages within the adobe ecosystem.
- **ASE** files are adobe swatch exchange format files which in summary are collections of colors. These files can either be downloaded from websites such as Kuler or created in many adobe products including Illustrator and Indesign, via. ASE (Adobe Swatch Exchange) files.
- ASE can be downloaded from several color pallet derivation websites including Adobe Color, formerly Kuler. These sites can be used to create color sets through various color theory based systems including Triad, Monochromatic, Complementary, and several others.
- **Exportings ASE files** is simple in Illustrator and Indesign. First create a collection of colors, in the watches Window accessible through the dropdown **Window > Swatches**. When the window is open, you can create a collection of colors by deleting all the current swatches available, and adding your own by dragging them either from the color window, or from the Fill or Stroke buttons on the toolbar. Organize collections using folders and name colors as desired. When the color set is complete, click on the dropdown menu in the upper right hand corner of the swatches window (note all windows in adobe products have this dropdown) and click Save Swatches in Indesign or Save Swatch Library as ASE in Illustrator. These swatches are now a separate file accessible in any compatible adobe product.
- Importing ASE files is equally easy. From the swatches window, **Window > Swatches**, click on the dropdown menu in the upper right hand corner of the swatches window and in Illustrator go to **Open Swatch Library > Other Library** and select your ASE file, in Indesign click the same dropdown on the swatches window, but choose **Load Swatches**. Your color set will now be accessible.

02: Object Styles

- The object style is used for setting the properties of the frame in which text or images sit as well as their relationship to the frame's edge. It can however also be used to control graphic shape and picture frame settings and therefore has many options which you will not be covered in this document but are worth exploring for other uses. The object styles for text boxes will generally be shared between most similar font style setups.
- Object Styles are also the primary means of passing formatting from master pages to document pages. By applying paragraph styles the contents of a text frame can be modified, while the frame itself will retain the object styles applied to it. This allows for the altering or exchanging of paragraph styles on text objects to be applied throughout an entire document, even after the text has been modified on each page.
- **Object Styles** can be set by going to **Windows** > **Object Styles** in CS4, **Windows** > **Styles** > **Object Styles** in CS5 & 6
- Text Oriented Options include.
    - General
        - **Based On** is used to inherit properties from another style. Any aspect of the style that is not overridden locally will be used.

    - Paragraph Styles allow the selection of a premade paragraph style to be applied to the frame's text contents.
    - Text Frame General Options
        - **Inset Spacing** is used to put internal buffering between the edge of the text box and where the text body is actually located. This is an extremely useful feature as it allows you to align text boxes to grids or the edge of images, but will keep the text from butting up directly against the image or graphic, keeping the text clean and legible. This can be uniformly offset by default, or if the chain link icon is clicked, on a per edge basis.
        - **Vertical Justification** sets the position from which text will be distributed relative to the boxes frame. Body text generally, will be distributed from the top down, the same way it is read, while a page number always wants to sit close to the bottom edge and would be aligned as such, whereas a title may want to float in the center
    - **Text Frame Auto Size** Options can be used to limit how wide/ high a frame can be shrank too. This prevents text from being overrun by accidently resizing a box which has been limited.
- Image Oriented Options include
    - **Text Wrap & Other** allows for the setting of the behaviour of the contents of a frame, be it image or text when it is placed over another text frame's body of text. The text can be split around the image frame, stopped by it, wrapped around it, or allowed to flow over it with several options for specifying exactly how these reactions will be spaced, oriented, offset, etc.
    - **Frame Fitting Options** preset how images placed into a frame will be scaled.
    - **Stroke** not only allows the specification of the stroke color, weight, and the usual Adobe stroke options, but also the fill color. This is useful when initially laying out a document as it allows all text frames to have a color applied to them. This clarifies how the document will look when the frames have images added to them, allowing evations of margins, gutters, alignment, etc. and the general balance of the document. Making this part of the object style for picture frames allows the color to easily be set back to clear when to document is ready to move into production and has the added benefit of highlighting image frames which have the style applied.

04: Placing Images

- Image content can be added to a document by either going to **File > Place** and choosing a file, or much more simply, just dragging image content from a windows explorer folder into the document. Images can either be dropped on a blank area of the page, or inserted into picture frames by dragging them over the frame area and releasing the mouse button. Be sure the picture frame layer is unlocked.
- Images can be sized independent of the frame by clicking them with the **Selection Tool**, the white arrow tool, while the picture frame itself, or crop box, can be resized by using the **Direct Selection Tool**, or the black arrow.
- Right click on an image frame to adjust the image relative to the frame or the frame to the image by using the **Fitting** submenu of the right click popup. This gives several options to automatically scale the content or frame with specified restraints.
    - **Fit Content To Frame** resizes content to fit a frame and allows the content proportions to be changed. The frame will not change, but the content may appear to be stretched if the content and the frame have different proportions.
    - **Fit Frame To Content** resizes a frame to fit its content. The frame's proportions are altered to match the content proportions, if necessary. This is useful for resetting a graphics frame that you accidentally altered.
    - **Center Content** centers content within a frame. The proportions of the frame and its content are preserved. The size of the content and frame are unaltered.
    - **Fit Content Proportionally** resizes content to fit a frame while preserving the content proportions. The frame's dimensions are not changed. If the content and the frame have different proportions, some empty space will result.
    - **Fill Frame Proportionally** resizes content to fill the entire frame while preserving the content's proportions. The frame's dimensions are not changed. If the content and the frame have different proportions, some of the content will be cropped by the bounding box of the frame.

[4.4] Page Templates

01: Tiered Master Pages

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- Master pages, are one of the most powerful template systems in Indesign as it allows you to create a whoel range of layouts which can inherit graphic elements that may appear only once in a document or on every page. This allows a great deal of flexibility in adjusting the entirety of a booklet from a few select master pages at any time during the layout process.
- Like styles, master pages, found at the top of the **Pages** window under **Window** > **Pages** can be developed with parent child relationships in the same manner as styles. If you create one master page with just a title then create new master pages which are **Based On Master Page**, your first master page, then you can create varied and unique formatting options with a constant title bar, pager numbering, etc.
- New master pages can be created by right clicking in the master page window and choosing **New Master…** or selecting an existing master page, right clicking on it and choosing **Duplicate Master..(message varies)**. The naming and associations of existing master pages can be changed by selecting the master pages, right clicking and choosing **Master Options for..(message varies)**.
- Using the prefix in particular is a good way to structure which master pages serve as top level templates and which are based off of them. A being a top level parent template, B being image

based pages, C being title pages, D being text pages for example.

- All styles should be applied to elements,text frames, image frames, lines, etc. within master pages. This way all pages in the document will reference back to these few points which control the formatting. That way later in document production, if a paragram style, or title location need to change, they can be updated on a few, or ideally one, master page, and the entire document will be revised instantly. Object styles in particular are important to apply at this stage.
- Note that master pages do not print, they are purely in document templates. As such, placeholder content can be added to a master page, which when brought into the document will be overridden locally on the document pages which reference back to the master.
- A few parent master pages can drive a diverse set of children master pages. The parent mater pages may never actually be directly used in the document, but instead serve as backgrounds on pages which will have content added to them.
- An example of Best Practices for structuring a portfolio document's master pages would be follows.
    - [**0** **prefix*] **Base** **name (*none **based on)*
        - This top level Parent Page would contain nothing but a page number one on spread and any other graphic elements which were to be constant throughout the document. All child pages will in some way be based off this
    - [**0**] **Grid** (0 - Base)
        - This page, like the base will not be used directly in the document, but will be a background for typical layout pages etc. This establishes the underlying structure into which graphic and text elements will be placed through the use of grids and guides (see topic below). It should still be based on the 0 - Base master page however, as pages can only be based on one master page, and therefore the elements in Base need to be placed in the background of Grid.
    - [**A**] **Info Pages** (0 - Base)
        - Pages that are essentially blank, let for items like table of contents, appendix, acknowledgements, etc. which will be unique one off items. This page should be used in the document in lieu of using the Base or Grid pages as they may later have unique graphics added to them which may not be desired on the remainder of the document's pages
    - [**A**] **Chapter Title** (0 - Base)
        - Chapter title might contain just a title and subtitle, or description. If a table of contents is to be used, this is the only page where a Paragraph style unique to the Chapter titles should be used and only of the chapter title itself. All other text / objects should use unique paragraph/ object/ character styles as the table of contents will inherit its text and location from elements where a paragraph style has been applied.
    - [**B**] **Project Title** (0 - Grid)
        - A project title page may contain a combination of image, text, titles etc. But should use a unique paragraph style for the actual project title for the same table of contents applications as the Chapter title. The grid master page is used as the basis to allow for the structuring of the page elements.
    - [**B**] **Typical Layouts** (0 - Grid)
        - This is where a whole range of basic to custom layouts can be developed to allow for consistency throughout the document exploring different uses of the grids, relationships between text and image, etc. But falling within a clear structure and consistent relationships in gutter spacing alignment etc. throughout the document

to create a legible document in addition to showing individual project work. What is essential, like all master pages is that every element is attached to a style so that later changes will be complete and not leave elements spread throughout the document that will not change when the document is updated. This is where the application of Object styles in particular is absolutely critical.

- When a master page set is developed, the document is now ready to be developed and filled with content. This means bringing instances of master pages into the document pages
- To create a new document (printable) page from a master page template, simply drag the master page into the Pages list below. To overwrite a page's formatting, drag a master page onto the target page.

02: Grids & Guides

- Using grids and guides is incredibly important to creating a clean presentation. The worst thing you can do in a presentation is have text and images jumping all over from page to page. All the audience will detect is the motion and their focus on the content will be completely lost. Set up a basic grid of guides on the top level master page and respect the grid structure throughout the document. Break the page into two sets over overlapping grids, a 4x4 and a 3x3 grid overlayed give a tremendous amount of flexibility in layouts, while keeping the contents formatting regular and predictable.
- To see all the grids, guides, and frames in a document you can either hit **W** to switch back and for between a preview of what the document will look like printed, called **Bleed**, and a working view showing all the drawing aids, called **Normal**. These can also be toggled between by going to the dropdown **View > Screen Mode > …** Additionally the quality of the images can be regulated in the preview by going to **View > Display Performance > …** and choosing the desired quality. Note none of these selections will affect the final output, but are purely for preview/ workflow purposes.
- Manually Creating Guides:
    - To create local vertical guides click over on the ruler area at the far left of the document window and drag the mouse over the page this should bring a vertical line into the page area. Use **Smart Guides** to snap these guides to specific locations on the page, found under **View > Grids & Guides > Smart Guides**, or use the **X:** input to manually place the location of the guide. This is always best practice to clean up the spacing to clean increments. The same can be done for horizontal guides by dragging the guide from the ruler at the top.
    - Once the grid has been established, you want to create a consistent offset around the center lines so that the images and text all have clean and consistent gutters around their edges. This is easily done by selecting a guide and copying and pasting it then moving it up slighting, then repeating and moving it down at the same increment. Once set, select the three guides, the original center, the top and bottom and you will see that a new option is available by the X or Y inputs, **W:** or **H:**, depending on if you have selected the horizontal or vertical guides. Use this input to set a consistent and clean number for the spacing. A good rule of thumb is half to three quarters whatever the common outer margin is. These guides can then be moved as a set, snapping to either the center or edges of the collection, allowing them to be cleanly moved together.
- Automated Grids
    - Using **Layout > Create Guides** will allow the automatic production of an evenly spaced grid of guides to be created. This is a much better way to produce general grids than

manually constructing them. The options in this tool allow for the number of both columns and rows of grids to be specified as well as the gutter (or gap) between the resulting pairs of guides. This allows for clean/ consistent spacing of page contents. Additionally the grid cells, which will all be equally sized, can be based of the extents of the page, or the margins. For a printed document the margins is often more beneficial in that moving around of images from one cell location to the next will not require resizing.

03: Overriding Pages

- Content can be locally updated without losing the master page link. For text content simply hold **ctrl & shift and left click** a text object created in a master page on a reference page to change the text. The boxes location, size etc. will still be linked to the master page, while the text can be updated locally.
- With picture frame objects, the boxes with the x through them, an image only needs to be dragged into the empty box. This will allow you to place content locally, without altering the master page.
- Any pages link back to the master page can be broken by right clicking on the page and choosing **Override all Master Page Items**. This will break all links to the master page.

04: Layers

- **Layers,** found under the **Window** drop down, allow some of the same basic functionality as found in Photoshop and Illustrator, but are very limited.
- Proper layer management is extremely important to the success of a consistent document structure. As with Illustrator, the hierarchy within the layer list determines which object will occlude others. This means that you need to determine what the rules for your layouts are and consistently follow them. A suggested starting general best practice layer structure is as follows:
    - **Titles** *(top)*: User for top level titles, which will not change throughout the length of a document. These would always sit on top of all other content on a page, even full bleed images.
    - **Subtitles & Annotation**: This is used for titles and text which will change frequently throughout a document, but may be useful to lock its position even if other body text is being modified.
    - **Graphics**: This layer is for any graphic elements which do not come from a text or picture frame, arrows, boxes, lines, etc. Anything that is drawn in indesign as a graphic element would go here
    - **Text**: This if for body text only, large blocks of text.
    - **Images**: All content that is referenced in via picture frame objects. Anything that is linked to the file goes on this layer
    - **Grids** (multiple): These layer is purely for the grids and guides, allowing different grids, such as the 3x3 and 4x4 grid to be toggled on and off.
    - **Background** *(bottom)*: This layer is for a large rectangle extending to at least the bleed line of the document which can have a color assigned to it for the background of every page where it is used. This layer should remain almost always locked.

[4.5] Document Management

01: Chapters & Subchapters

- Breaking a document up into chapters, particularly with portfolios or documents over 50 pages is good practice to help classify and guide the viewer towards what particular collections of projects or images might be based around. This makes navigation of the document easier.

- Chapters or Sections if one wants to think about a portfolio in those terms, also allow for the use of paragraph styles in conjunction with a table of contents to act as a tool for jumping to particular regions of interest within a larger document.
- Indesign includes a chapter number feature, however for image, and not dominantly text based documents, the use of chapter titles is probably a clearer and simpler means of organization

02: Page Numbering

- Page numbers in indesign is an automated and adaptive process in which a text variable is placed into a text frame, which then displays the number of whatever page it it instanced to.
- Page numbers are very easily added to any text frame by opening the text editor then going to **Type> Insert Special Character > Markers > Current Page Number**.
- Additionally the total number of pages in the document can be listed by going to **Type > Text Variables > Insert Variables > Last Page Number** which would allow for the construction of a page number that would look like (“Page ” Current Page Number “of” Last Page Number) or (Page 1 of 15) for example.

03: Table of Contents

- The table of contents feature allows for an instantly updatable table of contents to be produced in your document. This means that you can shuffle around the order of any pages, or restructure the document hierarchy and immediately produce a new accurate table of contents with pages numbers, and any other desired parallel information.
- The table of contents pulls its information from text that has particular paragraph styles applied to it. For example if you wanted a table of contents with Chapter titles and their subsets of project titles you would need at minimum two paragraph styles. One used only on and on every new Chapter title and on one for each time a new Project Title is first used. The table of contents tool can then extract the text from the titles as well as identify their pages.
- Items in the table of contents can have their own formattings applied to them as well, as you probably wouldnt want a table of contents to have the same Character styles as the titles in the document. This requires the production of an additional set of paragraph styles just for table of contents text.
- The description of the table of context editor, though simple to use once understood, is a bit too complex to describe with text. Instead refer to the following links:
    - https://helpx.adobe.com/indesign/using/creating-table-contents.html
    - http://indesignsecrets.com/three-small-toc-tricks.php
    - https://www.youtube.com/watch?v=iNxWdgCXyi

[4.6] Packaging & Exporting

01: Reviewing Content

- Make sure that images you link into a document are still valid by going to **Window** > **Links**. If you move an image on your computer, Indesign will lose the reference and need to be updated by right clicking on a link with a yellow explanation mark on it and choosing **Relink**.
- Be aware that just because an image looks good on the screen, it may not when you print. Use the info window found at **Windows** > **Info** to check the Effective PPI. This should be at 150-300 before printing and 72 dpi or higher before exporting for digital display.
- Documents can be previewed in a slideshow at any time by going to **File > Folio Preview** which will open a separate application.

- Indesign will also warn if you if text is overrunning,(or being clipped by), the text frame. If there is an error, the little green indicator circle in the bottom toolbar of indesign will turn red and read error. If clicked on, this will take to to the location of the error and allow correction. Packaging and publishing will also raise warning telling you if these issues, and other similar ones exist.

02: Packaging

- When a document has reached a significant level of content, it may become advantageous to bundle the images, fonts and indesign file into one clean collection. This is called **Packaging** found under **File > Package** which will create simple compact folder set containing everything used to create the indesign file. Packaging will include the following contents:
    - **Links**: all images and content that is referenced into frames will be copied to a new local folder inside the package folder, called Links.
    - **Fonts**: this will copy all fonts used in the indesign document into a new folder called Fonts. Be sure that you have legal rights to use or copy the fonts.
    - A **PDF** file is now created in the latest version of InDesign.
    - A duplicate copy of the Indesign files is also made which points all of its image content to the new links folder.

03: Exporting to Image

- Exporting to images allows for rapid production of a series of raster files in png, jpeg, and several other formats.
- Keep in mind that certain formats may not be compatible with all the color or transparency settings in an indesign document. Color conversions to RGB may be required, images may have sampling limitations, and transparency may be flattened. Be sure to research your image format before exporting to it.

04: Exporting to PDF Interactive

- Making a PDF is the most common means of outputting publication content both as a standard for the print industry and as a means of digital or web presentation. Indesign now has several options for outputting a pdf found under **File > Export**:
- **Adobe (Interactive)**: Is used for documents that are meant to be shown digitally, its outputs will be formatted for web output, not print. It can have Movie and Interactive flash based content embedded within it, as well as using Table of Contents and hyperlinks. It has simple options for:
    - **PPI** (dpi), 72 by default and 150 if a large scale projection might be used.
    - **JPEG** quality which should be set to Maximum for a presentation and medium for email.
    - **View** determines what the default scale will be when the pdf is opened, fit page being the cleanest for presentation document
    - **Layout** sets the page organization in the pdf itself, a simple slide show would be default, whereas a book exported for projection would be Two Up Facing, or Two Up Cover depending on if there is a single cover page at the beginning of the document.
    - **Presentation** can be checked to Open in Full Screen Mode, which always makes a good impression as there is no fumbling about with the pdf, however can be very irritating when the document is to be sent to someone via email.
    - **Page Transitions** create the effects that occur between one page and the next, fade is always the cleanest!

05: Exporting to PDF Print

- Switching to this option contains a much more intense set of options for output. This is meant to give greater control for physical print requirements. The default [High Quality Print] is a good baseline to get a clean output, however this will not necessarily correct for things such as CMYK vs RGB or bleed and crop marks.
- Note that these settings can be downloaded for both Blurb and Lulu which will set the output to match the publication standards.
- Options to be aware of include:
    - **Pages**: Also available in Interactive, this allows you to set whether the whole document or just select pages will be output.
    - **Pages** vs **Spreads**: For documents with facing pages, sets whether the output pdf will will join spreads into a single page or leave each page separate. Issuu.com for example wants individual pages and will produce the spreads automatically, while a pdf output for projection may want to combine spreads to be sure the content is viewed correctly.
    - The **Include** features allow additional graphic and interactive content to be exported. This is most useful during the design process or for digital output.
    - **Compression tab**: Contains options to modify the dpi of the output content, this can be used to make a pdf smaller for email (72 dpi min) or increase quality for prints 150 dpi+ for local printing, 300 dpi for publication.
    - **Marks and Bleeds**: Allow the inclusion in prints of marks designating the border frames for Page Boundaries, Bleed Lines and Slug lines as well as other color and document information. This is useful for cutting down prints to final size printed on oversized paper. Common when preparing a publication to check margins, alignments, etc.
    - **Output**: This is where the color profile can be specified. CMYK for print, RGB for web, there are various options.

5.0: Appendix

[5.1] Additional Reading

1. https://helpx.adobe.com/indesign/topics.html
2. https://helpx.adobe.com/indesign/tutorials.html
3. http://www.smashingmagazine.com/2011/03/17/indesign-tips-i-wish-i-d-known-when-starting-out/