Technical Description of the Process of Creating a Document in InDesign

Gillian Mohn
Hannah Monk
Chad Schultz
Ben Steinbach

Table of Contents

List of Figures

Technical Definition

The process of creating a document using the InDesign program involves use of document formatting measurements, including document size, document preference, margins, and bleed and slug.

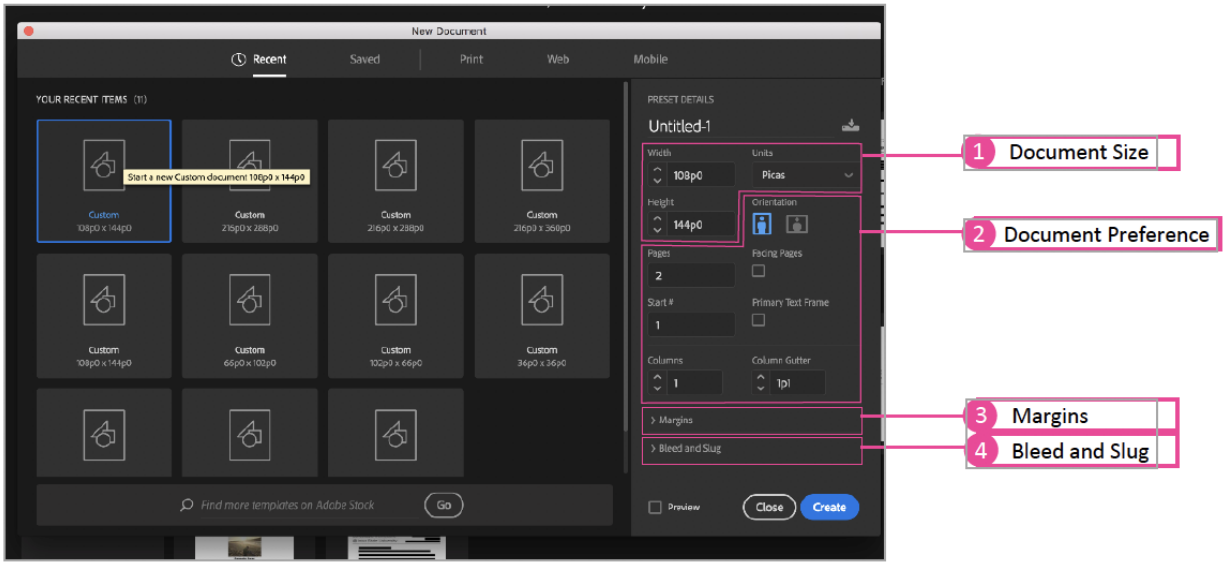

Figure 1: InDesign Start Menu

Introduction

Document design is a major part of the technical communication field. Currently, Adobe InDesign is considered an industry standard by most students in the major and professors at Iowa State. Document creation is the first step to learning InDesign; if a technical communicator in the field does not know this program well, it could pose a problem.

The purpose of document design is creating documents that benefit the audience, present their messages clearly, and utilize design elements to create visual appeal and understanding. In the technical communication field in particular, document design is user-focused and tailored to specific contexts.

Despite many project-based jobs having "learn-on-the-job" attitudes, basic familiarity with common programs such as this can greatly improve a technical communicator's ethos. This technical description will detail the different aspects of creating a document using the InDesign program and how those aspects attribute to one's overall credibility as a document designer in technical communication.

Discussion

1) *Document Size*

Definition. The length and width of a document are greatly affected by the genre of document you are creating. A wedding invitation is significantly smaller than a poster or a banner, for example. In InDesign, there are several different unit options to determine the size of your document.

Functions. Some measurements are most commonly used to communicate horizontal distances, such as the distance between the side of the page and where the text is anchored, also known as the margins. Other measurements are more likely to be used when communicating vertical distances such as the distance between subsequent lines of text and the size of the text itself.

Almost all these measurements are ultimately relative to the meter. The meter is defined by using a universal constant: The speed of light. Thus, the meter is defined at 1/299792458 of the distance light travels in a vacuum in one second. The meter itself is not used as a measurement in InDesign but is necessary to define in order to completely define the rest of the measurements listed below.

- Centimeters – exactly 1 of a meter
- Millimeters –exactly 1/10 of a centimeter, or 1/1000 of a meter
- Inches – exactly 2.54 centimeters, or 0.00254 meters
    - This is the standard unit of measurement in the United States.
- Points – approximately 1/72 inch, or exactly .013836 inch.
    - This is the most commonly used measurement to indicate text size and spacing.
- Picas – A Pica is equal to 12 points, or just less than 1/6 inch.
    - These are generally used for horizontal measurements such as column width.
- Ciceros –equal to .178 inch or 4.51 mm
    - Ciceros are generally used as a horizontal measurement.
- Agates – equal to 5.5 points
    - An agate is known as a ruby in the United Kingdom.
    - This measurement is generally only used in newspapers and is considered the smallest legible text size. It is normally only used to display statistical information or legal notices.

Pixels are not a physical measurement and are used as a measurement for digital works only. A pixel is a small uniformly colored square. Hundreds, thousands, and even millions of pixels make up some digital images. The physical size of a pixel is determined by properties of the screen it is displayed on such as screen size and resolution.

Below is a graph that gives the relative size of all the measurements listed above. The size of the bars are only to show relative sizes and are not accurate to the physical size of these measurements. To get an idea for the actual size of some of these measurements, relate them to the size of the left side margin of this paper which is one inch, the longest bar on the chart below.

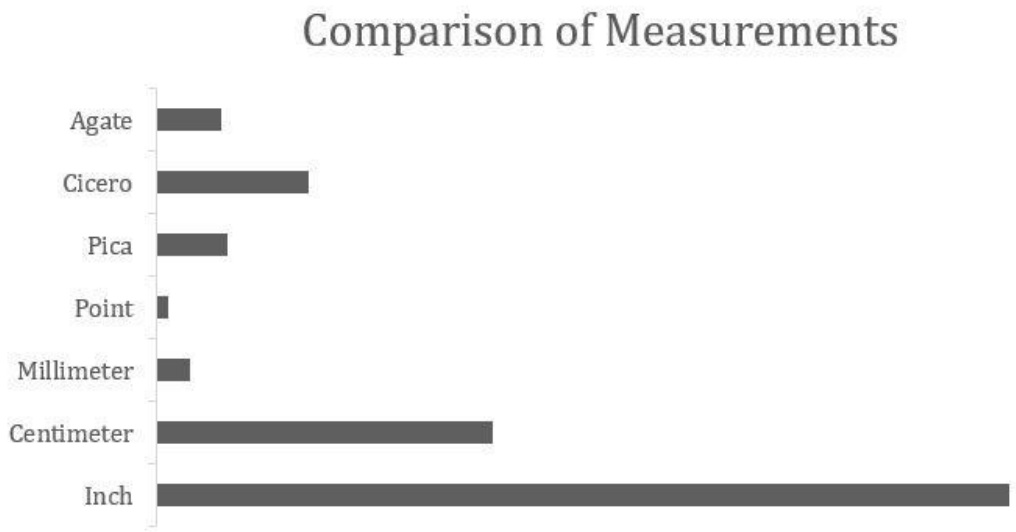

Figure 2: Comparison of Measurements.

2) *Document Preference*

Definition. Document preference refers to the customization options that are chosen to create a specific genre of document. In the InDesign program, this includes *Pages*, *Start Number*, *Orientation*, *Facing Pages*, *Primary Text Frame*, *Columns*, and *Column Gutter*. Each of these components has its own standard correlating to genre of document.

Functions. *Pages* and *Start Number* decide the preferred length of the document being designed. The page count directly states the number of pages needed in the document, and the *Start Number* creates a relationship between the page count and stated page number. The input at *Start Number* allows the user to generate a document where the first page number starts at any number,and counts upward by one for each new page. The orientation of a document can be either landscape or portrait, and this will be determined by the genre of document you are creating. However, most genres allow for creativity in this particular formatting.

Facing Pages, *Primary Text Frame*, *Columns*, and *Column Gutter* decided the preferred format of the pages in a document. *Facing Pages* and *Primary Text Frame* are terms in InDesign referencing the relationship between each page in a document. *Facing Pages* is a design option

that allows the document pages to be arranged in spreads in the pages menu in the InDesign program. Having two pages face each other resembles a signature, as an open book ormagazine does (About Spreads and Pages). This option can be easily be turned off and on through the use of a check box below the words "Facing Pages." If this box is left unchecked, the pages in the pages menu will not be touching each other. This option affects how a document is designed, printed, arranged.

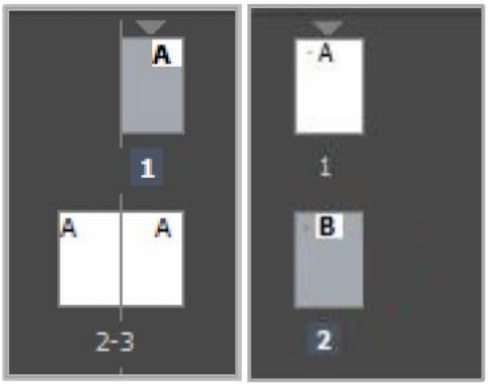

Figure 3: Facing Pages Menu

Primary Text Frame is a design option that allows text to automatically flow from one master page to another without involvement from the user. This feature allows document designers to easily change the appearance of an entire document by only changing elements on the master page so the other pages will mimic the changed page. *Primary Text Frame* is also used to remove or add pages automatically. Just like *Facing Pages*, this option can be turned on or off with the use of the check box. If the box is left unchecked, each page will need to be manually adjusted to the user's preferences.

In the first window of InDesign, the *Columns* option refers to the number vertical sections a page is separated into, which are separated by gutters, or the white space between the sections. The *Column Gutter* option allows for users to create a specified length for the gutter. Each of the option inputs are declared by a semicolon; however, they can also be manually inserted by the user. Columns can be used to divide information, such as in a newsletter, or to group objects more easily. The functionality of these different elements allows for a user to create a document to their specific preferences and genre standards.

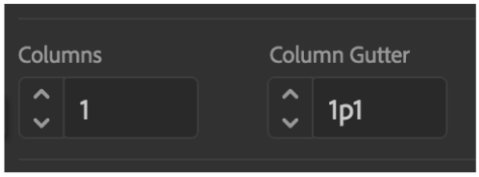

Figure 4: Column Menu

3) *Margins*

Definition. Margin refers to the boundary for the main text frame, images, and other elements of your document. Margins can connote genre of a document and also affect the information included in terms of white space and readability.

Functions. Appropriate margins sizes are determined by the genre of the document being created. Margins can affect the ethos of a document and its designer, and it can affect different visual cognate strategies, such as the clarity and conciseness of the document. In the field of technical communication, small details such as appropriate margin sizes can greatly affect one's credibility as a technical communicator.

In western document design, the standard margin size for regular documents on size A4 pages is one inch on all sides. Narrower or wider margins can indicate to the reader the type of document they are reading. For example, newsletters tend to have very narrow margins

and very wide column text widths. This is a practical method of design, as it allows the most amount of text on the page without compromising clarity. In contrast, many formal documents with more visual elements, such as a wedding invitation or an advertisement, tend to have wider margin sizes.

The margin size for a document in InDesign correlates to the measurement you have already designated at the top of the menu screen. The unit used for the margins will automatically change to what you have chosen. Shown in *Figure 4* to the right is standard margin sizes using picas. Standard sizes will automatically appear in the menu boxes after the initial unit has been selected. The icon to the right of the four margin options will either group or ungroup the four margins to have equivalent sizes.

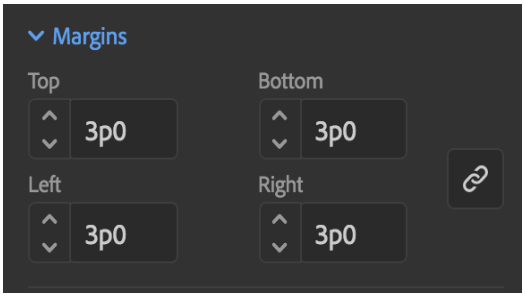

Figure 5: Margin Menu

Researching examples of similar documents and adhering to these appropriate sizes will improve your credibility as a technical communicator because it will show that you are familiar with the standards of the genre. Margin sizes, among the rest of the visual decisions you will have to make, will either improve or detract from the visual and contextual effectiveness of your document.

4) Bleed and Slug

Definition. Bleed and slug are terms used for document creation in the program InDesign to reference where the boundaries of the page are for printing. When a document bleeds, the color reaches the edge of the paper. A slug is similar, but it denotes where information is typed on digital documents and will be removed from printed copies. Printers disregard objects or text that cross the bleed and slug boundaries during printing as designated by your decisions on the InDesign document creation window. These relate to genre and ethos as including information in the slug may be necessary for your document, or having a bleed may be necessary for the genre of document you are creating.

Functions. Most personal printers cannot print to the edge of a piece of paper, so designating a bleed line at which the color will end allows you to print a on paper larger than desired and trim it to size so the color reaches the edge of the page. When an object or text touches the bleed boundary, InDesign automatically leaves a margin along the edges of the document so that after printing it can be removed and disposed.

Slug refers to non-printed information. This includes registration marks and the printer's printing instructions, as well as information for personal use such as date created, the date it was printed, and potentially the version of the document if there were multiple iterations. Slug information is generally not pertinent to primary audiences, so it is trimmed and disposed of. However, digital copies that are sent to secondary or external audiences may need that supplemental information.

Types of documents that use bleeds as a standard include but are not limited to newsletters, posters, book covers or textbooks, and other document that rely on heavy coloring and visual aids. Not including bleed boundaries when sending a document to a professional printing service may get your document rejected, as most have their InDesign printing preferences this way. Not including a bleed on a printed document may also show a lack of professionalism and disregard for industry standards.

In technical writing, using the standard preset option is the most useful as it creates a classic style that is easy for the reader to follow. For title pages, it could be helpful to extend bleed lines to the edge of the page to prevent the cropping of any potential images or backgrounds used. Bleed and slug are likely most pertinent to adjust for graphic design documents where boundaries can affect the visual effects a designer is trying to create.

In InDesign, there is a chain icon to the right of the unit adjustment box that allows you to create a uniform extension of the bleed or slug boundaries when checked on, or allows for you to adjust the bleed and slug for a single edge of the document when checked off. Shown in *Figure 5* to the right is the menu showing bleed and slug settings in inches.

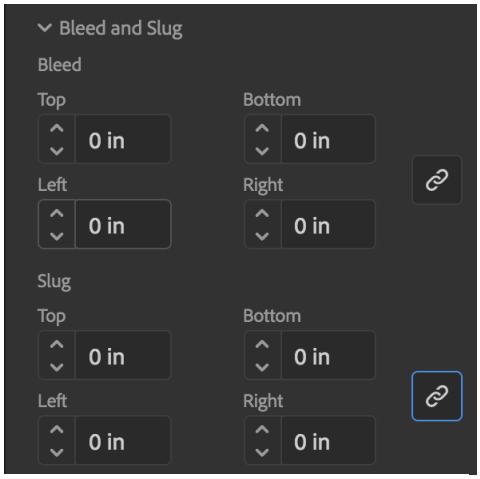

Figure 6:
Bleed and Slug Menus

Conclusion

Summary

Defining the foundations of document design and its use in the technical communication field shows how the various choices of a document designer work with the many components to create a functional document and promote ethos. Document design within technical communication is used in nearly any industry. For example, documents such as manuals or instruction guides are just as commonly created as advertisements and branding materials for different companies. Even though there are many different genres depending on factors such as culture, history, or intended use of a document, InDesign has the ability to accommodate what technical communicators' goals are within nearly any genre of document if the standard is followed.

References

"About Pages and Spreads." *InDesign User Guide*, Adobe, helpx.adobe.com/indesign/using/pages-spreads.html.

"Agate (Typography)." Trivia Quizzes, Revolvy, www.revolvy.com/page/Agate-%28typography%29.

"Cicero." Ink - PrintWiki, WhatTheyThink, printwiki.org/Cicero.

Kostelnick, Charles and David D. Roberts. *Designing Visual Language: Strategies for Professional Communications.* 2nd ed., The Allyn & Bacon Series in Technical Communication, Pearson Education Inc., 2011.

"What Is Pixel?" WhatIs.com, TechTarget, whatis.techtarget.com/definition/pixel.

Strizver, Ilene. "Points & Picas." Fonts.com, Monotype Imaging Inc., www.fonts.com/content/learning/fontology/level-1/type-anatomy/points-and-picas.