2 Setting Up Your Document

By taking advantage of the tools that help you set up your document, you can ensure a consistent page layout and simplify your work. In this lesson, you'll learn how to create master pages and set columns and guides.

In this introduction to setting up your document, you'll learn how to do the following:

- Start a new document
- Create and edit master pages
- Create additional masters
- Apply the masters to document pages
- Add sections to change page numbering
- Override master page items on document pages
- Add graphics and text to document pages

Getting started

In this lesson, you'll set up a 12-page magazine article about origami, and then you will place text and graphics on one of the spreads. Before you begin, you'll need to restore the default preferences for Adobe InDesign. Then you'll open the finished document for this lesson to see what you'll be creating.

1 To ensure that the tools and palettes function exactly as described in this lesson, delete or deactivate (by renaming) the InDesign Defaults file and the InDesign SavedData file. See "Restoring default preferences" on page 2.

2 Start Adobe InDesign.

3 If you want to see what the finished document will look like, open the 02_b.indd file in the ID_02 folder, located inside the Lessons folder within the IDCIB folder on your hard disk. You can leave this document open to act as a guide as you work.

For a color version of the finished document, see the color section.

The document window shows several spreads, including pages 2–3, which is the only spread that you'll complete in this lesson. You can refer to this document throughout this lesson.

Note: As you work through the lesson, feel free to move palettes around or change the magnification to a level that works best for you. For more information, see "Changing the magnification of your document" on page 50 and "Using the Navigator palette" on page 57.

Starting a new document

When you first start a new document, the Document Setup dialog box appears. You'll use this dialog box to specify the number of pages, the page size, and the number of columns.
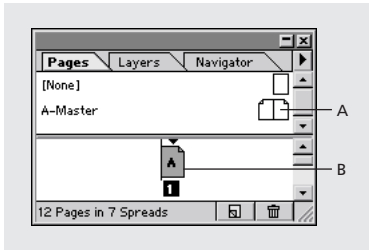
1 Choose File > New.

2 Make sure the Facing Pages option is selected. For Number of Pages, type **12**. For Width, type **50p3** (the abbreviation for 50 picas and 3 points). For Height, type **65p3**. Under Margins, type **4** for Bottom and leave the Top, Inside, and Outside margins at 3 picas (3p0). Under Columns, type **5** for Number.
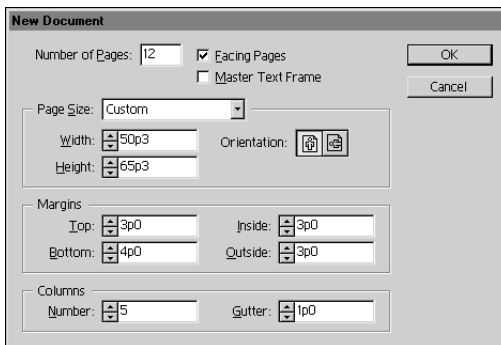
*Note: When you type numbers in a dialog box or palette, you don't need to type the unit of measurement (such as **p** for picas or **pt** for points) if the measurement you're typing is the default. After you type a value and press Tab or click another option, the measurement is applied automatically.*

3 Click OK.

The document window appears, displaying page 1, as indicated in the Pages palette. The Pages palette is divided into two sections. The top section displays icons for the master pages. The bottom half displays icons for document pages in your document. In this document, the master consists of a two-page spread for facing pages.

A. *Master pages* **B.** *Document pages*

**4** Choose File > Save As, name the file **02_Setup.indd** in the ID_02 folder, and then click Save.

Editing master pages

Before you add graphics and text frames to the document, you'll set up the master pages. A *master page* is like a background that you can apply to pages in your document. Any object you add to master pages will appear on document pages to which the master pages are applied.

In this document, you'll use three master pages. One master page contains a grid, another master page contains footer information, and another master page contains placeholder frames. By creating several sets of master pages, you allow for variation of pages in a document while ensuring a consistent design.

Adding guides to the master

Guides are non-printing lines that help you lay out your design precisely. Guides you place on master pages appear on any document pages to which the master is applied. For this document, you'll add a series of guides that, along with the column guides, act as a grid to which you can snap graphics and text frames into place.
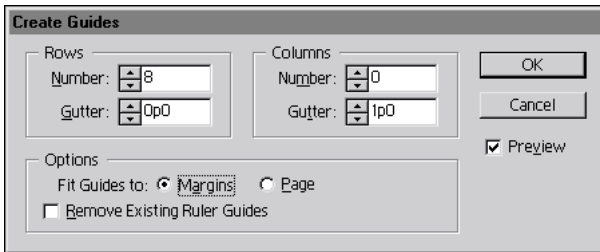
1 In the upper section of the Pages palette, double-click A-Master.
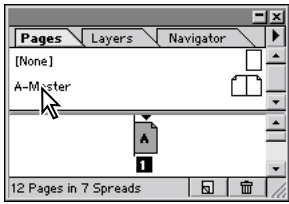
*Double-clicking the name of the
master page displays both pages
of the A-Master.*

The left and right master pages appear centered in the document window.

2 Choose Layout > Create Guides. Under Rows, type **8** for Number and type **0** for Gutter.
For Fit Guides To, select Margins.

Selecting Margins instead of Page causes the guides to fit within the margin boundaries
rather than the page boundaries. You won't add column guides because column lines
already appear in your document.
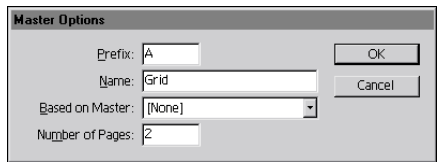
3 Select Preview to see how the horizontal guides will appear on your master pages.

4 Click OK.

Renaming the master page

In documents that contain several master pages, you may want to rename the master
pages to give them more descriptive names. You will rename this first master page "Grid."

1 Position the pointer on the black triangle to the right of the Pages tab, and choose
Master Options for "A-Master..." from the Pages palette menu.

**2** For Name, type **Grid**, and then click OK.


Creating a master for footers

The grid you added to the master is necessary for most of the pages in the document. In addition to the common grid, most document pages will require a footer, and some of these document pages will also require consistent placement of text and graphics. To accommodate these different designs, you'll create a separate master for pages that require footers, and another master that contains placeholder frames for text and graphics.

You can base master pages on other master pages. In this document, the footer master will be based on the grids master, and the placeholder master will be based on the footer master. By basing master pages on other masters, any change to the parent master will appear on the child masters.
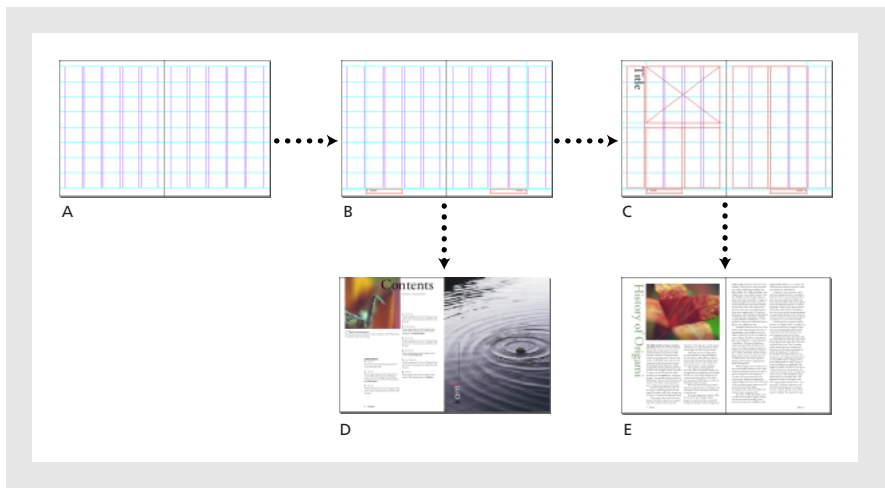

A. *A-Grid master* **B.** *B-Footer master* **C.** *C-Placeholder master* **D.** *Document pages based on B-Footer* **E.** *Document pages based on C-Placeholder*

1 In the Pages palette, choose New Master from the Pages palette menu.
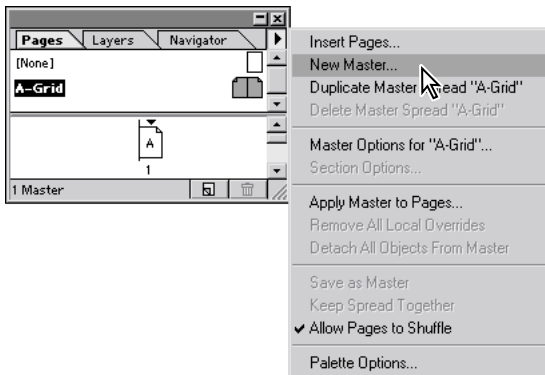
2 For Name, type **Footer**.

3 For Based on Master, choose A-Grid, and then click OK.

You're now working on a separate master page spread, as indicated by the selected B-Footer icons that appear in the upper section of the Pages palette. The grid you added to the A-Grid master appears on the new master spread.
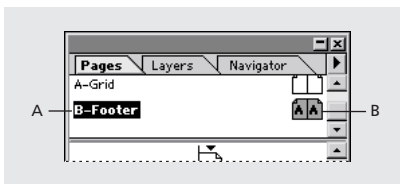
*A. Name of Master B. "A" indicates that the B-Master is based on the A master.*

Dragging guides from rulers

To position the footers accurately, you will add a horizontal guide and two vertical guides.

1 Make sure the B-Footer master pages are still in view (the page box near the bottom left corner of the document window indicates which page is displayed).

2 Without clicking in your document, move the pointer around the document window, and notice how the hairline indicators in the vertical and horizontal rulers correspond to the pointer's position. The dimmed X and Y values in the Transform palette also indicate the position of the pointer.

Now you will drag a guide from the ruler. You can drag to create a *page ruler*, which applies only to the page on which you drag, or a *spread ruler*, which applies to all pages in the spread as well as the pasteboard.

3 Holding down Ctrl (Windows) or Command (Mac OS), position the pointer in the horizontal ruler and drag to the 62 pica marker to create a ruler guide. Don't worry about placing the guide exactly at 62 picas—you'll do that in the next step. (You can look in the Transform palette to see the current position.)
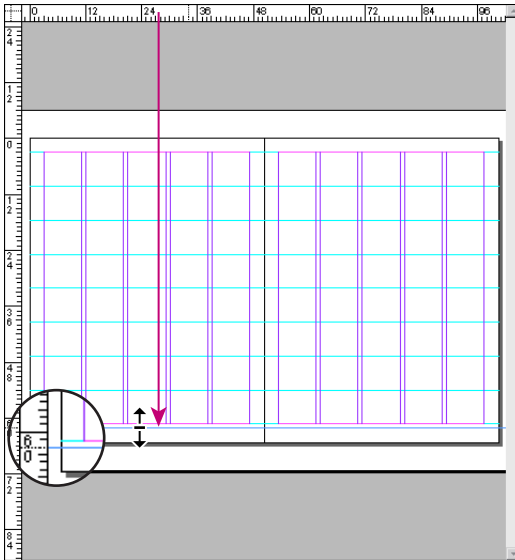
Holding down Ctrl (Windows) or Command (Mac OS) while dragging a guide applies the guide to the spread instead of the individual page.

4 To make sure the guide is at the 62 pica location, select the selection tool ( ) in the toolbox, click the guide to select it (the guide changes color), type **62p** in the Y box of the Transform palette, and then press Return or Enter.

5 Drag a ruler guide from the vertical ruler to the 12p0.6 pica marker (the ruler guide will snap to the column guide at that location).

6 Drag another guide from the vertical ruler to the 88p5.4 marker.
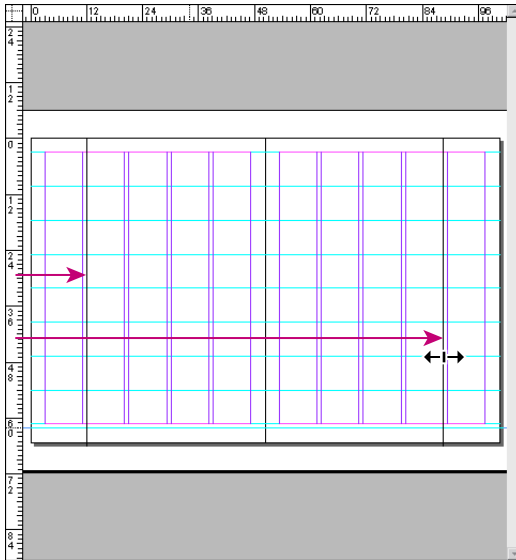
When you are selecting and dragging frames, it's common to drag guides accidentally. To prevent guides from being dragged, you'll lock guides.

7 Choose View > Lock Guides. Then choose File > Save.

Creating a footer text frame in the master

Any text or graphics that you place on the master page will appear on pages to which the master is applied. To create a footer, you'll add a publication title ("Origami") and a page-number marker to the bottom of both master pages.

1 Make sure that you can see the bottom of the left master page. If necessary, zoom in and use the scroll bars or hand tool.

2 Select the type tool (**T**) in the toolbox. On the left master page, drag to create a text frame below the second column where the guides intersect, as shown. Don't worry about drawing the frame in exactly the right location—you'll snap it into place later.
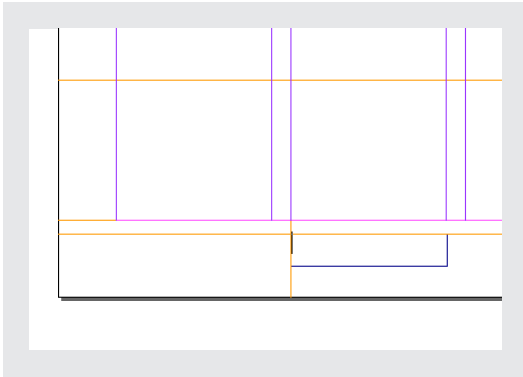
3 With the insertion point in the new text frame, choose Layout > Insert Page Number.

The letter B, which represents the B-Footer master, appears in your text frame. This character will reflect the current page number in your document pages, such as "2" on page 2.

4 To add an em space after the page number, right-click (Windows) or Control-click (Mac OS) the text frame to display a context menu, and then choose Insert White Space > Em Space.

5 Type **Origami** after the em space.

Next, you'll change the font and size of the text in the frame.

6 With the insertion point still in the text frame, choose Edit > Select All to select the text and page number marker.

7 In the Character palette, choose Adobe Garamond® from the Font Family menu (you may need to scroll through the menu). For Size, choose 10 pt.
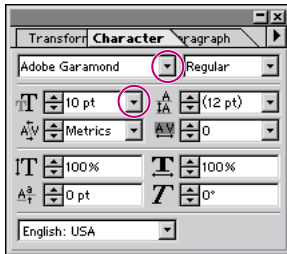
Note: It's easy to confuse the Size menu (⌃T) with the Leading menu (⌃A). Make sure you change the font size, not the leading.

8 Select the selection tool (⌃). If necessary, drag the footer frame so that it snaps to the horizontal and vertical guides, as shown.
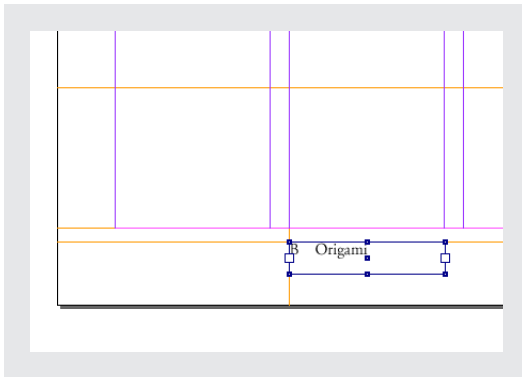
9 Click a blank area of your document window or choose Edit > Deselect All to deselect the footer frame.

Notice that part of the footer frame is hidden by the guides. You will change a preferences setting to place the guides in back and change the column guide color.

**10** Choose Edit > Preferences > Guides. Under Guide Options, select Guides in Back. Click OK.

Notice that the guides are now behind the footer frame.

Copying and pasting to create a second footer

You have created a footer text frame on the left master page. Unless you insert a similar footer on the right master page, only the left-facing pages in your document will have page numbers. You'll copy and paste the text frame to the right master page, and edit it from there.

1 Using the selection tool (➤), select the footer frame, and then choose Edit > Copy. Choose View > Fit Spread in Window to show both master pages.

2 Choose Edit > Paste. The text frame is pasted into the middle of the spread.

3 Click inside the pasted text frame and drag it to the right master page so that it snaps to the guides, mirroring the right master page as shown.
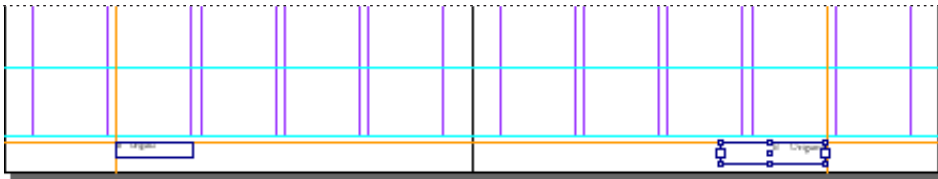

4 Make sure that you can see the bottom of the right master page. If necessary, zoom in and use the scroll bars or hand tool.

5 Select the type tool (T), and then click anywhere inside the text frame on the right master page to place an insertion point.

6 Click the Paragraph palette tab (or choose Type > Paragraph), and then click Align Right (≡).
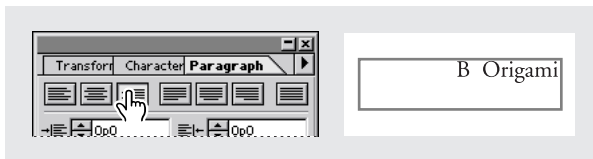
The text is now right aligned within the footer frame on the right master page. Now you will improve the mirror effect by placing the page number after "Origami" on the right master page.

7 Delete the em space and page number at the beginning of the footer.

8 Place the insertion point at the end of the word "Origami," and then choose Layout > Insert Page Number.

9 Place the insertion point between "Origami" and the page number; right-click (Windows) or Control-click (Mac OS), and then choose Insert White Space > Em Space.
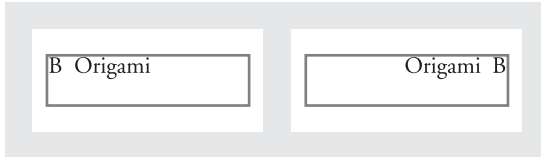

Left footer and right footer

10 Choose File > Save.

Creating a placeholder master

Next, you'll create a third master page for placeholders for the text and graphics that will appear in your articles. By creating placeholders on the master pages, you can ensure a consistent layout among articles, and you won't need to create text frames for each page in your document.

1 In the Pages palette, choose New Master from the Pages palette menu.

2 For Name, type **Placeholder**.

**3** For Based on Master, choose B-Footer, and then click OK.

Notice that the C-Placeholder icons display a B in each page in the Pages palette. This letter indicates that the C-Placeholder master is based on the B-Footer master. If you were to change either the A-Grid master or the B-Footer master, the changes would be reflected in the C-Placeholder master. You may also notice that you cannot select objects, such as the footers, from other master pages unless you override those objects. You'll learn about overriding master page objects later in this lesson.
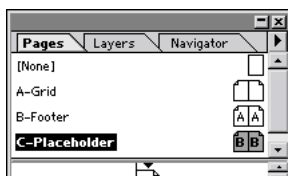
Adding a title placeholder frame

The first placeholder will contain the article's title in a rotated text box.

1 To center the left page in the document window, double-click the left page icon of the C-Placeholder master in the Pages palette.
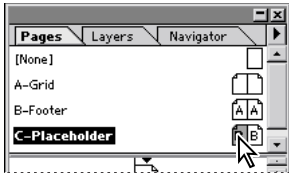

2 Select the type tool (T). Drag to create a text frame that is slightly wider than the page and approximately as tall as one of the grid blocks. You'll position and resize this text frame later.
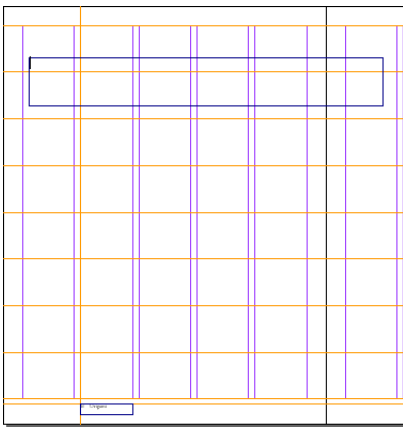

3 Type **Title**.

4 Double-click "Title" to select it.

5 Click the Character palette tab (or choose Type > Character). Select Adobe Garamond. For Size, choose 72 pt.

6 Select the selection tool (↖). If necessary, click the new text frame to select it.

7 In the Transform palette, select Rotate 90° CCW from the palette menu.
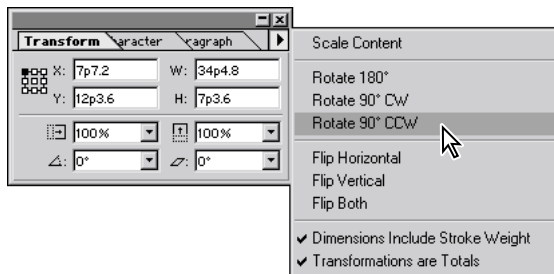
8 Drag the rotated text frame down so that it snaps to the lower left column guides on the left page.

9 To resize the text frame, drag the upper right handle so that the text frame fills the first column.
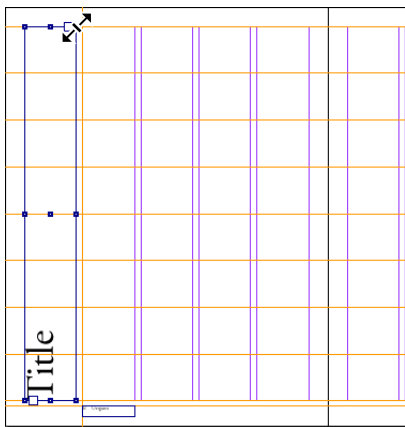

10 Save the document.

Adding a placeholder frame for graphics

You have now created the text frame placeholder for the title of your article. Next, you'll add a graphics frame to the top half of the left master page. Similar to text frames, graphics frames act as placeholders for the document pages, helping you maintain a consistent design.

First, let's create a guide to make it easy to position the graphics frames.

1 To unlock guides, choose View > Lock Guides to uncheck the menu command.

2 Drag a ruler guide from the horizontal ruler to the marker at 30 picas on the left master page (you can look in the Transform palette to see the current position).
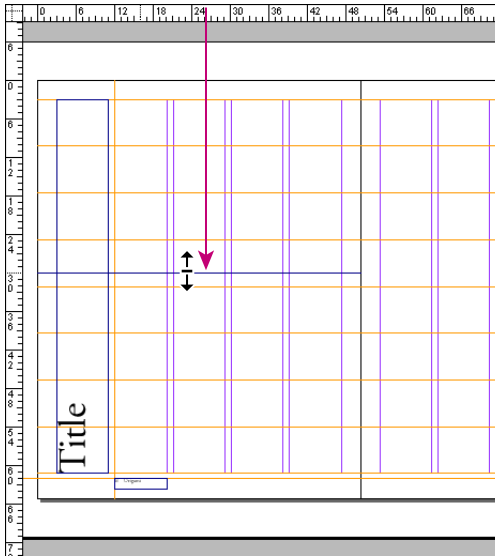

To make sure the guide is at the 30 pica location, select the selection tool ( ) in the toolbox, click the guide to select it (the guide changes color), and then type 30p in the Y box of the Transform palette. Press Enter or Return.

3 Choose View > Lock Guides to lock the guides again.

Two tools let you create rectangles: the rectangle tool and the rectangle frame tool. Although they are more or less interchangeable, the rectangle frame tool—which includes a non-printing X—is commonly used for creating placeholders for graphics.

4 Select the rectangle frame tool ( ) in the toolbox.

5 Draw a frame in the upper portion of the left page that is four columns wide. The left side of the frame should snap to the 12p0.6 guide and the bottom of the frame should snap to the guide you set at 30 picas.
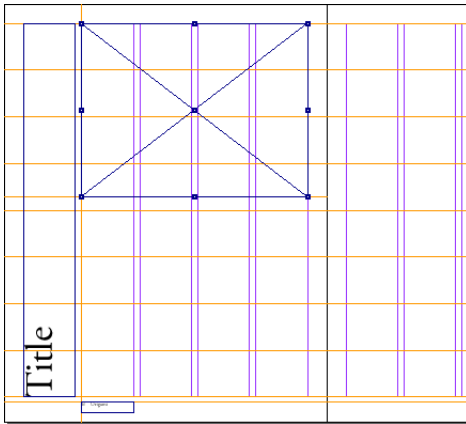
6 Choose File > Save.

Creating text frames with columns

You have added placeholders for the title and graphic on the first page of the article. To finish the C-Placeholder master, you'll create the text frames for the main story of the C-Placeholder master.

1 Select the type tool (**T**), and then drag to create a text frame four columns wide and four rows tall on the lower half of the left master page, snapped to the guides as shown.
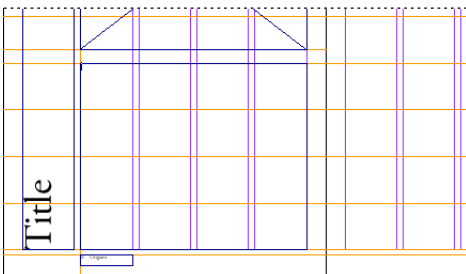
2 Choose View > Fit Spread in Window. On right master page, drag to create a text frame four columns wide and eight rows tall, snapping to the guides as shown.
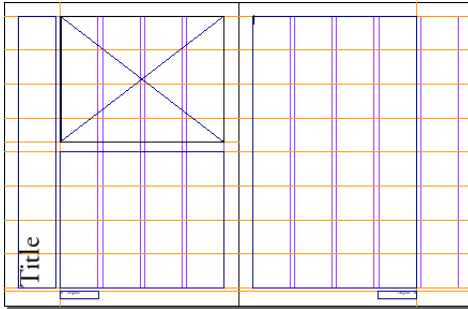

Next, you'll make sure each of the main story text frames has two columns.

3 Select the selection tool (➤). Shift-click to select both text frames.

4 Choose Object > Text Frame Options. Under Columns, type **2** for Number, and then click OK.

Each of the main story text frames will include two columns of text. To make sure the text flows from one text frame to the next, you will thread the frames.

5 Click the outport in the text frame in the lower half of the text frame on the left page. Hold the pointer over the text frame on the right master page so that it becomes a link icon (⚲), and then click.
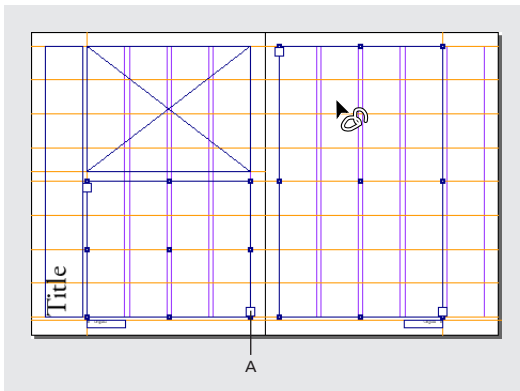

A. Outport

6 Save the document.

Applying the masters to document pages

Now that you have created all your master pages, it's time to apply them to the pages in your layout. All the document pages are formatted with the A-Grid master by default. However, you will apply the B-Footer master and the C-Placeholder master to the appropriate pages. You can apply master pages by dragging the master page icons onto the document page icons or by using a palette menu option.

In large documents, you may find it easier to display the page icons horizontally in the Pages palette.

1 In the Pages palette, choose Palette Options from the Pages palette menu.

2 Under Pages, turn off Show Vertically, and then click OK.

3 Drag the bar below the master pages down so that you can see all the master pages. Then drag the lower right corner of the Pages palette down until you can see all the spreads. You may also want to drag the other palette groups down so the Pages palette doesn't cover the other palettes.
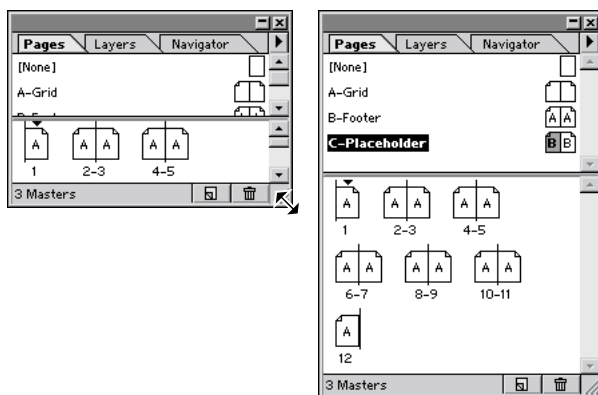
First you'll use the drag and drop technique to apply the C-Placeholder master to pages in the document that will contain articles.

4 Drag the C-Placeholder name over the 6–7 page numbers below the page icons. When a box appears around both pages in the spread, release the mouse button.
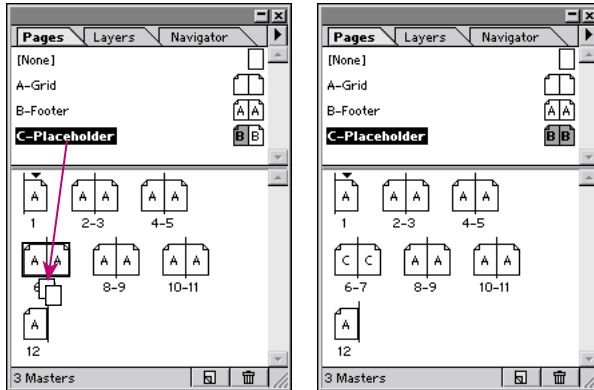
The C-Placeholder master pages are applied to pages 6 and 7, as indicated by the letter C in the page icons. Instead of dragging the C-Placeholder master to the remaining spreads, you'll use a different method to apply master pages.

5 Choose Apply Master to Pages from the Pages palette menu. For Apply Master, choose C-Placeholder. For To Pages, type **8-11**. Click OK.

Notice that pages 6–11 in the Pages palette are now formatted with the C-Placeholder master. Now you'll format pages 2–5 with the B-Footer master. Pages 2–5 will contain introductory material that requires a footer without placeholder frames.

6 Choose Apply Master to Pages from the Pages palette menu. For Apply Master, choose B-Footer. For To Pages, type **2-5**. Click OK.

Page 12 will require individual formatting without page numbering, so no master page is desired.

7 Drag the None master to page 12.

Make sure the A-Grid master is assigned to page 1, the B-Footer master is assigned to pages 2–5, and the C-Placeholder master is assigned to pages 6–11; page 12 should not have a master page assigned to it.
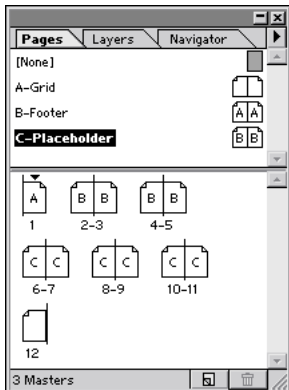
8 Choose File > Save.

Adding sections to change page numbering

The magazine you're working on requires introductory material that should be numbered with lowercase roman numerals (i, ii, iii, and so on). You can change the page number by adding a section. You'll start a new section on page 2 to create roman numeral page numbering, and then you'll start another section on page 6 to revert to arabic numerals and restart numbering.

1 Double-click the page 2 icon in the Pages palette.

Notice that because the B-Footer master is assigned to page 2, the page includes the guides and footer information, but it does not include any of the placeholder frames that you added to the C-Placeholder master.

2 Choose Section Options from the Pages palette menu. Make sure Start Section is selected.
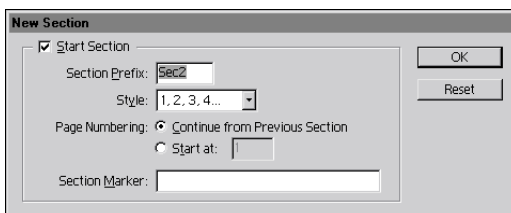
3 For Style, choose i, ii, iii, iv... (lowercase). For Page Numbering, make sure Continue from Previous Section is selected, and then click OK.
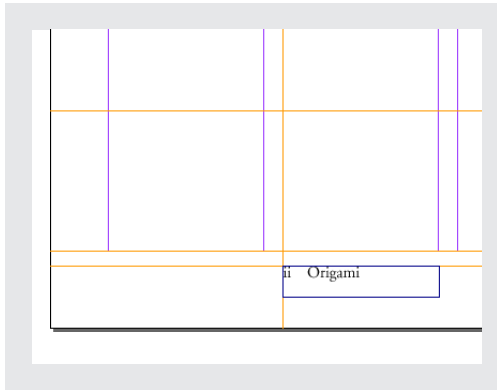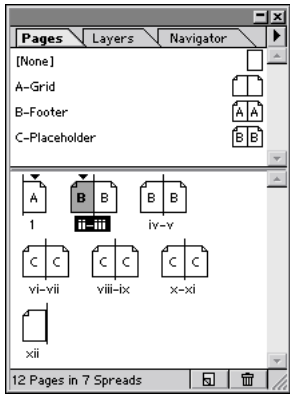

The Pages palette and the page numbers on page ii. The triangle above page ii in the Pages palette indicates the start of a new section.

Starting with page 2, the page numbering occurs in roman numerals, as shown in the Pages palette. Now you'll number the other pages in arabic from page 6 through the rest of the document.

4 Click page 6 (vi) in the Pages palette to select it.

5 Choose Section Options from the Pages palette menu. Make sure Start Section is selected. For Style, choose 1, 2, 3, 4.... For Page Numbering, select Start at and type **2**. Click OK.
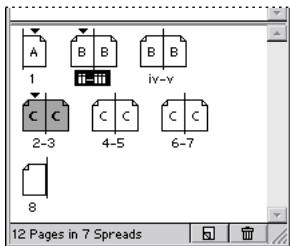
Now your pages are renumbered properly. Notice that a black triangle appears above pages 1, ii, and 2 in the Pages palette. These triangles indicate the start of a new section.

6 Choose File > Save.

Placing text and graphics on the document pages

Now that the framework of the 12-page publication is in place, you're ready to format the individual articles. To see how the changes you made to the master pages affect document pages, you'll add text and graphics to the spread on pages 2 and 3.

1 In the Pages palette, double-click the page 2 icon (not page ii) to center the page in the document window.

Notice that because the C-Placeholder master is assigned to page 2, the page includes the grid, the footers, and the placeholder frames.

When you want to import text and graphics from other applications, you can copy and paste, or you can use the Place command. You'll use the Place command to insert text in the frame.

2 Choose File > Place. Double-click 02_c.doc in the ID_02 folder.

The pointer takes the shape of a loaded text icon (▤). With a loaded text icon, you can drag to create a text frame or click inside an existing text frame. When you hold the loaded text icon over an existing text frame, the icon appears in parentheses (▤). You can click to insert the text into the individual frame, or you can Shift-click to autoflow the text into the threaded frames.

3 Holding down Shift, click the loaded text icon (▤) anywhere inside the text frame on the bottom of page 2. Release the Shift key.
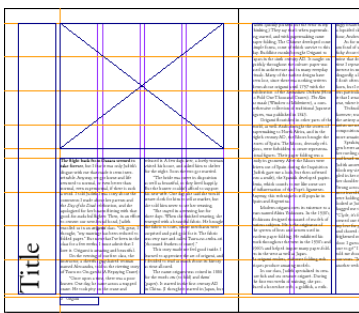
The text flowed into the text frames on pages 2 and 3. Now you'll add a graphic to the placeholder frame.

4 Choose Edit > Deselect All to make sure no frames are selected.

If a frame is selected when you place a file, the contents of the file will be added to the selected frame.

5 Choose File > Place. Double-click 02_d.tif in the ID_02 folder. The pointer takes the shape of a loaded graphics icon ( ).

6 Position the loaded graphics icon over the graphics frame placeholder on page 2 so that the pointer appears in parentheses ( ), and click.

7 To position the image correctly, choose Object > Fitting > Center Content.
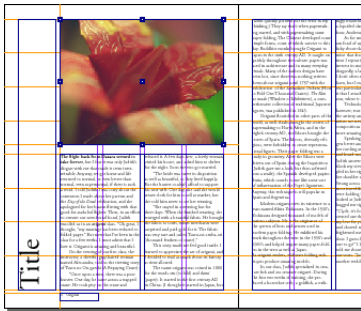
Overriding master page items on document pages

The placeholders you added to the master pages appear on the document pages, but you cannot select them simply by clicking them. InDesign works this way so that you won't accidentally remove or edit master page objects. However, you can override items on a master page to customize individual document pages. You'll now replace the word "Title" with "History of Origami."

1 To make sure you're on page 2, select Sec 3:2 from the Pages pop-up palette at the bottom of the document window.
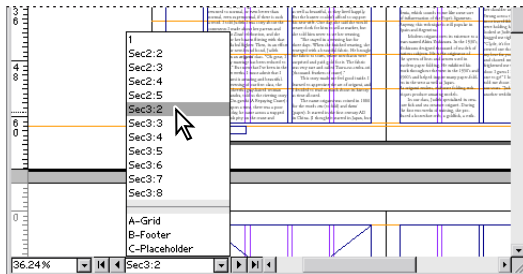
Turning to section 3, page 2

2 If necessary, adjust your view so that you can see the "Title" at the bottom of page 2. Click it to try to select it.

You cannot select master page items on the document pages simply by clicking. You'll use a keyboard shortcut that will let you select it.

3 Holding down Shift+Ctrl (Windows) or Shift+Command (Mac OS), click the title placeholder frame on the left side of page 2 to select it.

4 Select the type tool (T). Double-click "Title" to select it, and then type **History of Origami**.

The text is now replaced on the document page. Now you will use the eyedropper tool to color the text.

5 Using the type tool, triple-click "History of Origami" to select it. Make sure the Fill box (■) is selected in the toolbox.

6 Select the eyedropper tool (⚲), and then click a green color in the image. The color you click is applied to the selected text. Choose Edit > Deselect All to view the text in color.
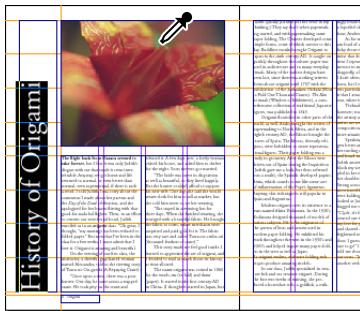
Editing master pages

Now suppose you want to reverse the direction of the vertical text throughout the document. Let's rotate the title placeholder on the master page and see what happens to the overridden frame on page 2.
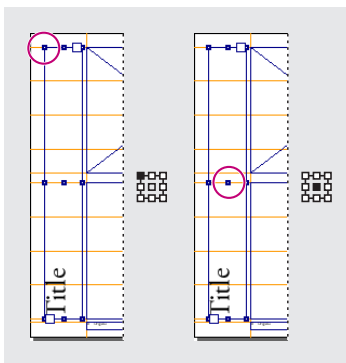
1 In the Pages palette, double-click C-Placeholder to display the master pages.
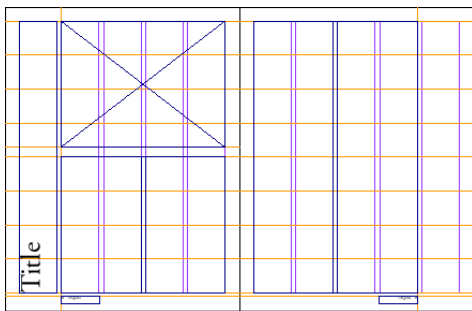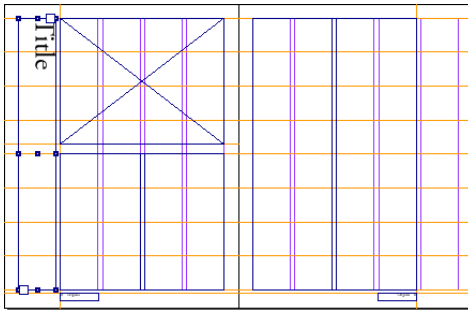

2 Select the selection tool (↖), and then click the "Title" text frame.

The proxy icon (⊞) in the Transform palette determines the point of rotation. In this case, we want the object to rotate around its center so that it stays in place.
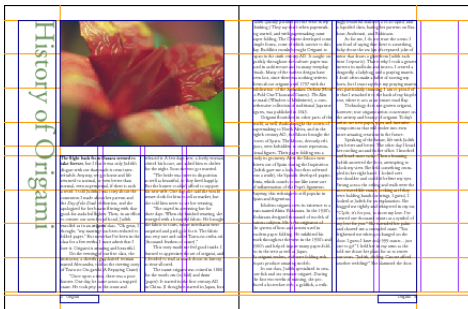
3 In the Transform palette, select the center point in the proxy icon.

4 In the Transform palette, choose Rotate 180° from the palette menu.

5 In the Pages palette, double-click page 2 (not page ii).

Notice that the local overrides to the title text on the document page remain in effect. Rotating the frame on the master page affected all the pages to which the master was applied, including the page containing the local override. When you override a master page item on a document page, you override only the set of attributes that you change. In this case, you changed the text and the color of text on the document page. If you were to change the text or color of text on the master page, those changes would not affect this overridden object. Try it.

Viewing the completed spread

Now you'll hide guides and frames to see what the completed spread looks like.

1 Choose Edit > Deselect All. Choose View > Fit Spread in Window. Choose View > Hide Frame Edges. Choose View > Hide Guides.

You have formatted enough of the 24-page document to see how adding objects to the master pages will let you maintain a consistent design throughout your document.

2 Choose File > Save.

Congratulations. You have finished the lesson.

Review questions

1 What are the advantages of adding objects to master pages?

2 How do you change the page numbering scheme?

3 How do you override a master page item on a document page?

Review answers

1 By adding objects such as guides, footers, and placeholder frames to master pages, you can maintain a consistent layout on the pages to which the master is applied.

2 In the Pages palette, select the page icon where you want new page numbering to begin. Then choose Section Options from the Pages palette menu and specify the new page numbering scheme.

3 Hold down Shift+Ctrl (Windows) or Shift+Command (Mac OS), and then click the object to select it. You can then edit, delete, or otherwise manipulate the object.