

InDesign

HANDS-ON GUIDE

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GETTING STARTED WITH INDESIGN

InDesign is part of the Adobe Creative Suite (CS) and integrates with Photoshop, Illustrator and others.

InDesign is a way to lay out containers for work created elsewhere, and to do some basic image creation.

You will create containers for images, text and graphics, and have full control on how they are combined.

You can print out your files or create JPGs or PDFs of documents that can be easily shared online.

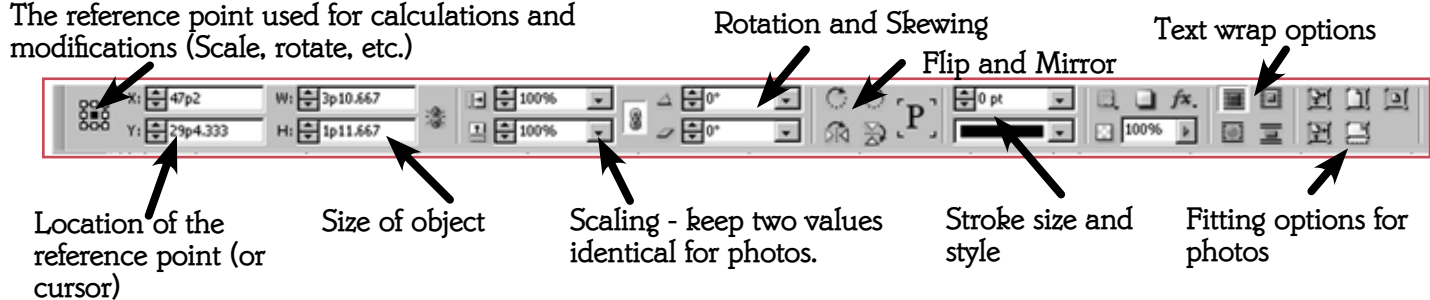
In Design maintains links to all the objects you place in your document, so you should make sure you do not delete any of your source files (photos, text and graphics) or your file will be missing items next time you open it. This keeps InDesign files small, and if you change an image, it will automatically be updated in InDesign.

THE CONTROL PALETTE <Window/Control>

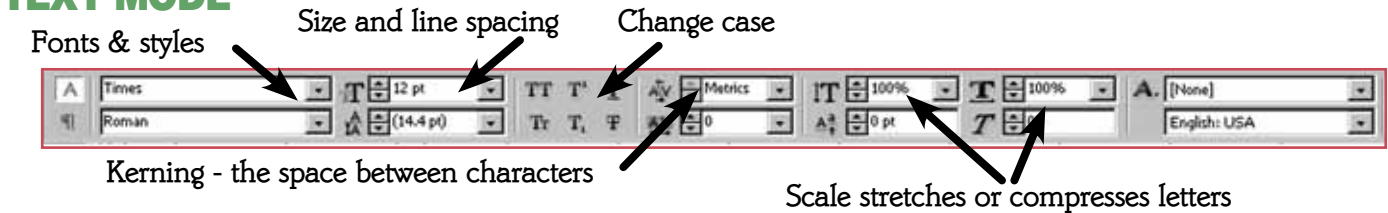
The Control Palette will change with each tool you select, and is where you change settings and how objects appear. The three views below are the ones you will work with most.

SELECTION MODE (USED WITH SHAPES AND PICK TOOLS)

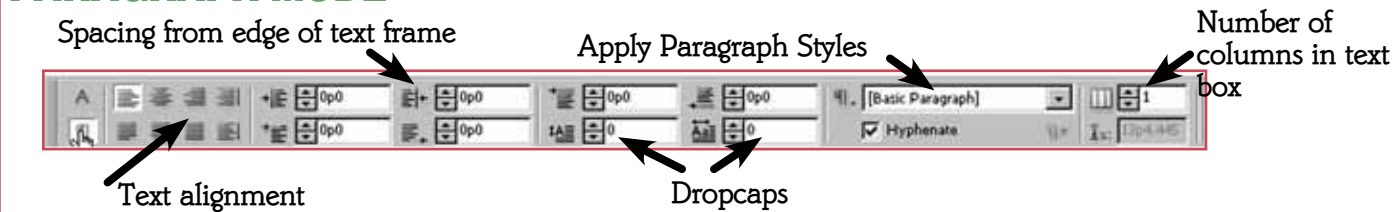
The reference point used for calculations and modifications (Scale, rotate, etc.)



TEXT MODE



PARAGRAPH MODE

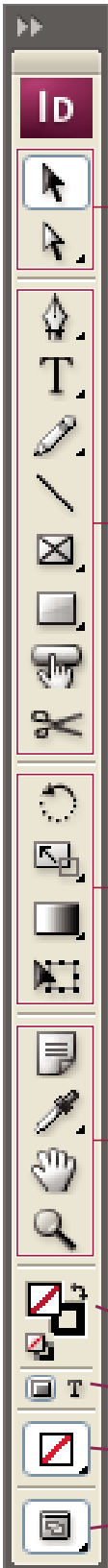


NOTE: Many of the buttons on the Text and Paragraph Control Palette repeat, so you can choose to work with the one that has most of the features you want to see. (You can switch by pressing on the A or ¶.)

THE TOOLBOX

These are the most commonly used tools and what they do. Each tool has many more options you can explore when you have some time - check the last few pages of this guide for some great effects.

Like all tools and windows, the Toolbox can be moved around and placed wherever convenient.



A - SELECTION TOOLS

WHAT THEY ARE USED FOR:

- **Selection (V)** - Select and Resize Containers & Objects
- **Direct Selection (A)** - Select items inside containers (like photos)

B - DRAWING & TYPE

- **Pen (P)** - Modify objects, like text wrap paths
 - Add Anchor Point
 - Delete Anchor Point
- **Type (T)** - Create Text boxes and type in them
 - Type On a Path (Shift+T) - For fun text along objects (use sparingly!)
- **Line (\)** - Draw Rule Lines
- **Rectangle Frame (F)** - Create Containers for your photos
- **Rectangle (M)** - Create Shapes that will have solid colour

C - TRANSFORMATION

- **Rotate (R)** - Choose which point to rotate around
- **Scale (S)** - Keeps Shapes proportional
- **Gradient (G)** - Add Boxes with gradient fills

D - COLOUR & NAVIGATION

- **Eyedropper (I)** - Add Boxes with gradient fills
- **Hand (H)** - Grabs Desktop and moves it on screen
- **Zoom (Z)** - Zoom in and out of objects

- Switches between Colour and Stroke (outline) if objects
- Applies formatting to Text or Container
- Applies Colour and Gradients based on current settings
- Switches between outline and Print Preview modes

■ Indicates default tool (Keyboard shortcut in Bracket)

PRACTICE LESSON

FOLLOW ALL STEPS EXACTLY TO RECREATE THIS SPREAD



GET STARTED

NOTE: RED text in <> brackets represents Windows commands or file names used for Navigation. Blue text refers to names of tools.

- Copy the files from the <InDesign Training> folder into your own working folder.
- Open the <template.indd> file to start the layout.

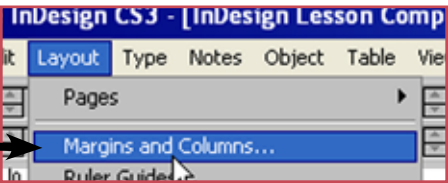
Make sure you can see:

- The Toolbox <Window / Tools>
- The Control Palette <Window / Control>
- The Columns and the Grid (see last step on previous page if you can't see them).

SETTING UP

The template should already contain columns and a grid, but if you can't see them, or change them by accident, here is how to get them back.

Go to <Layout / Margin and Columns>



- In the pop-up window:
- Check that your margins are set correctly.
 - Choose 4 columns with a 0p6 gutter.

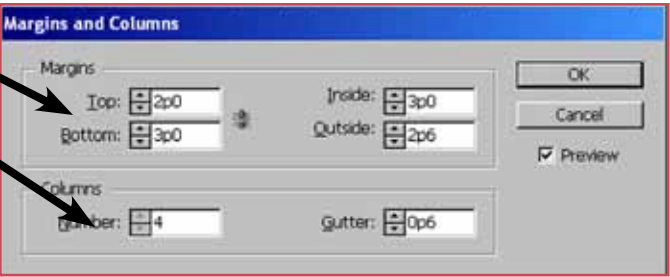
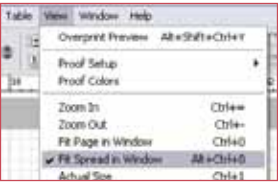


PHOTO BOXES

Zoom out so you can see your whole spread.
<View / Fit Spread in Window>

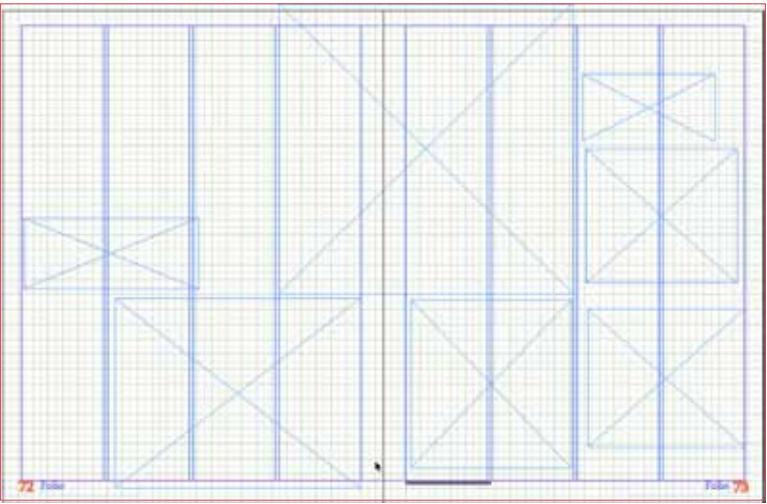


Start with your dominant image (2-3 times larger than the other photos) This image should cross the gutter.

- Use the **Frame Tool** to make all the photo boxes you will need. (The boxes should have an X through them)

- The boxes should touch the correct columns on the sides.

- Use the grid to line them up horizontally, but there is no need to 'count boxes' to match the sample - as long as you are close and within columns.

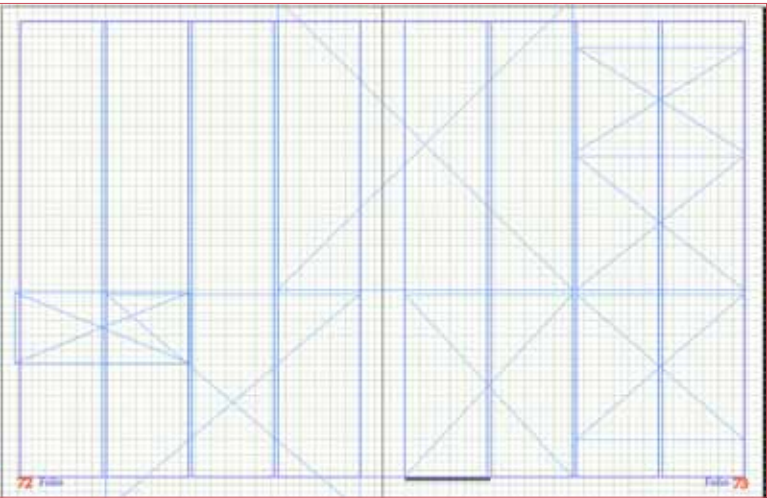


SIZING AND MOVING BOXES

Use the **selection tool** to move objects. Make sure your boxes line up.

- Keep 1 pica space around your objects. (our grid has dividers at 6 points and darker ones at full picas).

- This is what your page should look like at this point.



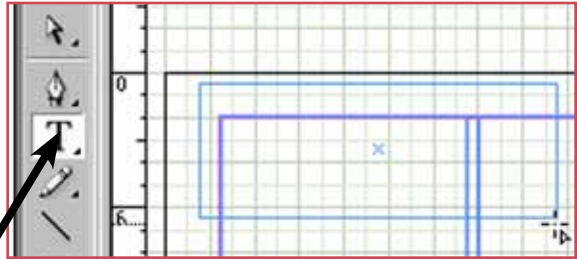
SAVE YOUR WORK

Use <File / Save As>

PLACING TEXT & CAPTIONS

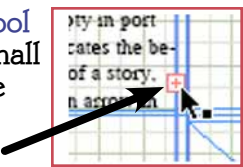
Next create boxes for your headlines, body and captions. Write these before starting your spread, so you know how much (or little) space you need. Place captions next to the image they describe. Do not trap any white space with your captions.

- Use the **Text tool** to draw boxes. Copy and paste text into your boxes. (There is a text file in the <InDesign Training> folder.)
- Open <Text.doc> in word.
 - Select the text you want and copy <Ctrl C> it to the clipboard.
 - Switch to InDesign.
 - Click your **text tool** in your text box and place <ctrl V> the text.



FLOWING TEXT FROM ONE BOX TO ANOTHER

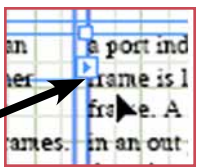
Use the selection tool and click on the small + at the edge of the text box.



You will get a loaded cursor.



Click in a new text box (or create one) and the text will flow there.

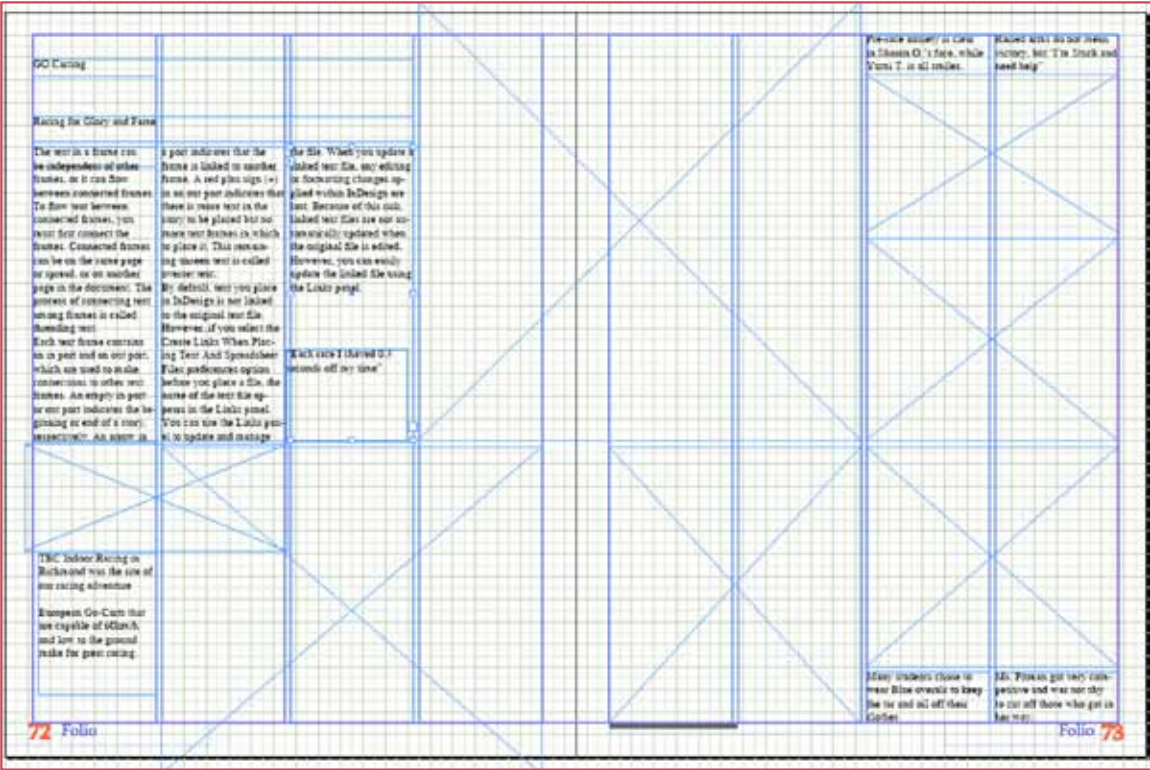


PLACING HEADLINES

Type your headline in a text box. We will apply styles next, so you don't need to worry about font size and style



This is more or less what you should have at this point.



PARAGRAPH STYLES

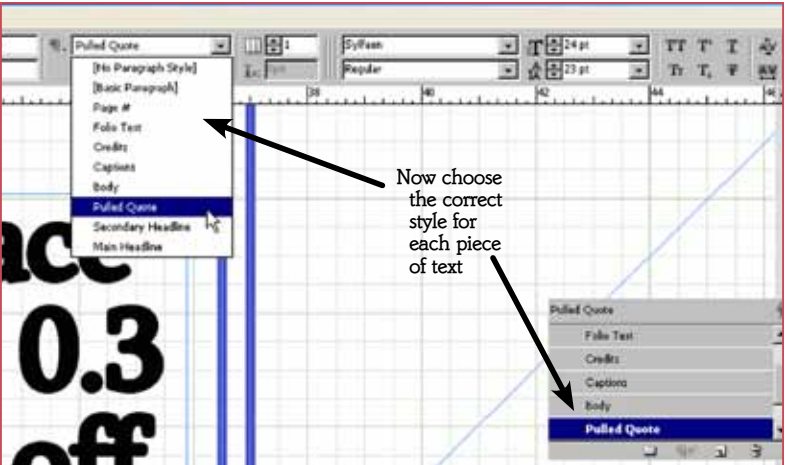
Styles show up in the text control palette, but they also have their own palette on the side.

(Click the <Paragraph Styles> tab on the right of the screen.) Use styles to save time and to make sure your pages are consistent.

If working on yearbook pages, make sure not to change the preset styles, or we won't know if your pages are off!

APPLYING STYLES

Use the Selection Tool and <click> on the text box you want to apply a style to. Use the the <Paragraph Styles> tab on the right of the screen to pick the style. If you have text selected, you can use the Control Palette to apply styles.



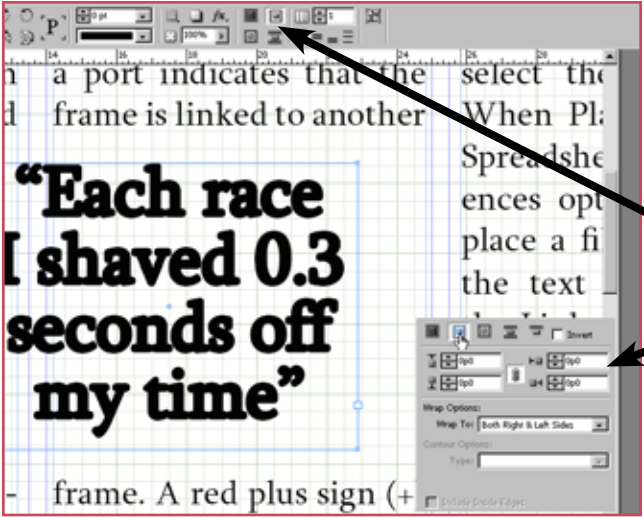
Now choose the correct style for each piece of text

PULLED QUOTE (TEXT WRAP)

Use the Selection Tool and <click> on the text box you want to apply a style to.

Use the the Textwrap options in the Control Palette to apply text wrap.

You can also use the <Text Wrap> tab on the right of the screen to pick the style.

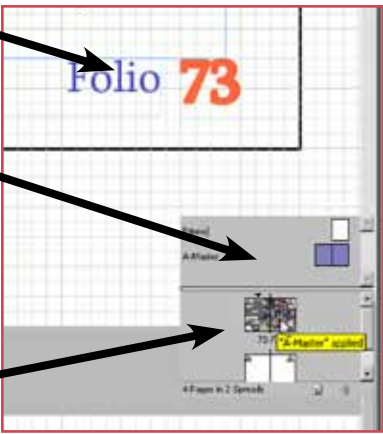


FOLIOS AND CREDITS

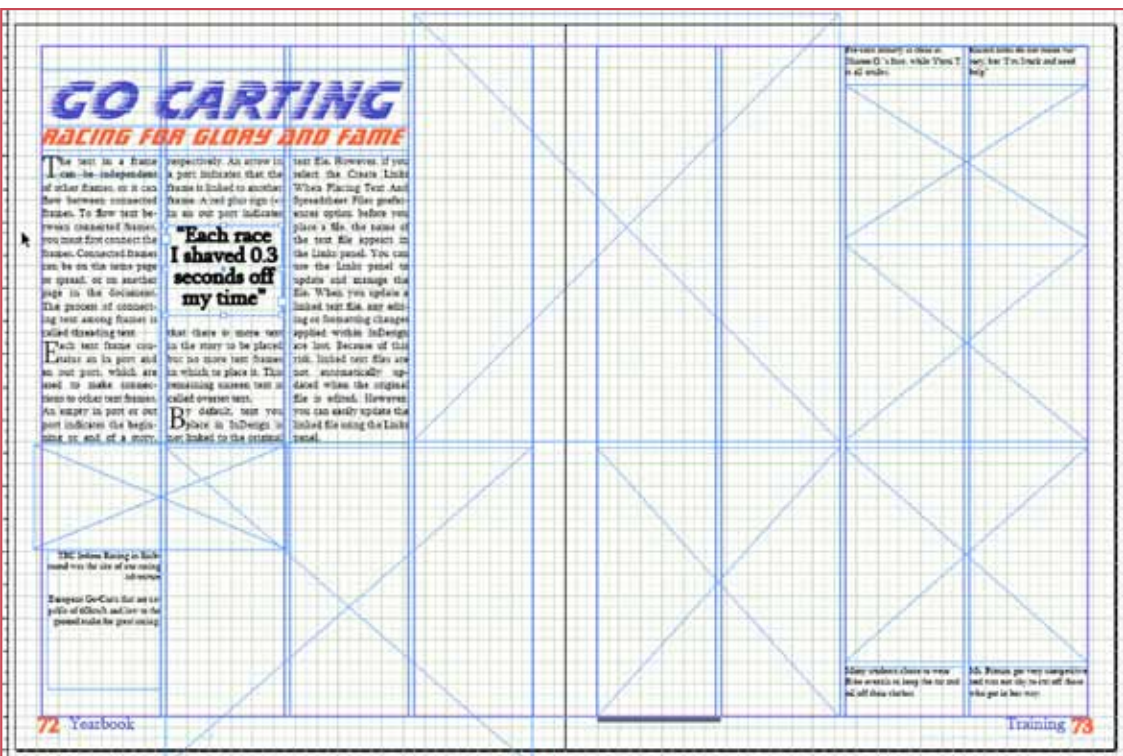
- Update the folio, which tells us the page number and section.
- Switch to the master page to update these items by choosing the <Window/Pages> tab and click on the Master Page for your page.
- Select the Folio text and update it on both sides.

- Do not change the 'A' where the page number should be. This means the correct number will be placed automatically.

- Add your name to the byline at the bottom.
- Switch back to your working document.



The layout with 'tweaked' text and folios.



PLACING PHOTOS

Use <File/Place> to choose a number of images to place.
- When placing multiple images you will see a small preview of the image next to your cursor. Use the up and down arrows to switch between images.

Place your images in the correct boxes.

Use the Fitting buttons on the Control Palette or use the menu to fit your image or fill the frame.
<Object / Fitting / Fill Frame Proportionally>

Make sure you keep your images proportional. Photos should never be stretched or scaled out of proportion.

Check that both scaling values remain identical.
- Hold down your <shift> key when dragging to resize an image so that it will remain proportional.

ROTATION

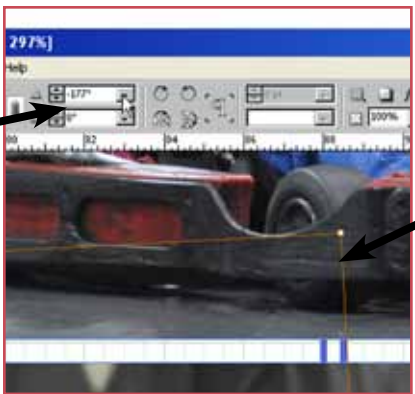
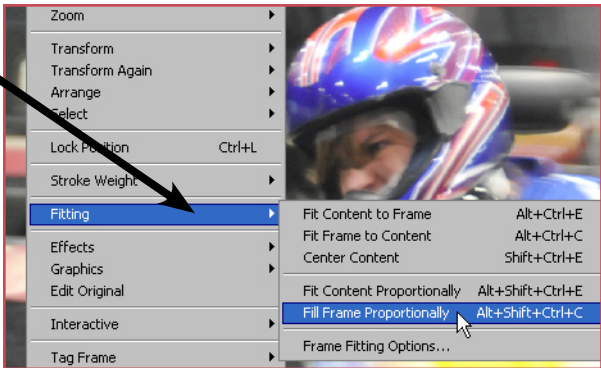
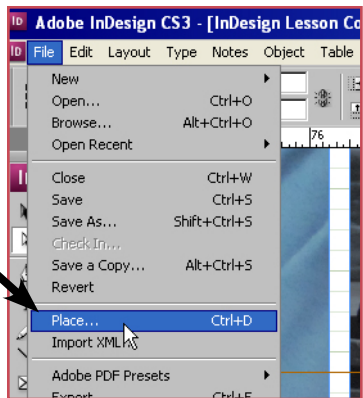
One of the images is rotated to keep the cart from driving off the page.
- Use the Direct Selection Tool (white arrow) to select the image.
- Change the rotation value to level out the cart.

STROKE (OUTLINE)

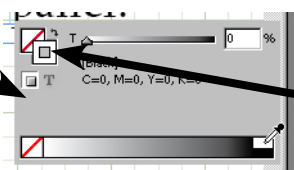
The left-most image overlaps another, so to make it stand out it needs a border - called a 'stroke.'

- Bring it to the front: to select it use the menu <Object / Arrange / Bring to Front>.
- To give it a stroke of 6 pts use the Control Palette or the Stroke Window <Window Stroke>.
- Make sure the Stroke is white - pick in the colour tab <Window / Colour>.

- Make sure the outside of the frame lines up with the grid, and the edge of the image is the same as the one next to it.



You will see the orange image frame rotate



Click here to switch between Fill and Stroke

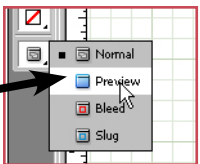
LAYERS

- If an object is behind another, and you want to change where it is, you can change the order.
- Objects can be shuffled to get the order you want.



PREVIEW

View your whole spread by zooming out a bit and clicking on the preview mode.



This is what your completed spread should look like. If not go back to see what you need to change! (If you have not done so yet, fix this space.)



DONE!

NOW THAT YOU KNOW HOW TO USE INDESIGN, YOU CAN START SETTING UP YOUR OWN DOCUMENTS!

MAKE INDESIGN YOUR OWN

SETTING UP PAGES

<File / New / Document> or <CTRL+N> will bring up the new document dialogue.

Here you set document Size, Margins and Columns.

To change these later you have to go to <File / Document Setup> and to <Layout / Margin and Columns>.

Choose how many pages in your document (you can add more later).

Enter your size. You can use any measurement you like, just enter 'in' 'cm' or 'p.'

Set margins for your document. Depending on the guides you will be using, you might want to change these values later, so the grid and columns line up!

Next you should set up your grids in preferences <Edit / Preferences / Grids> or <CTRL+K>.

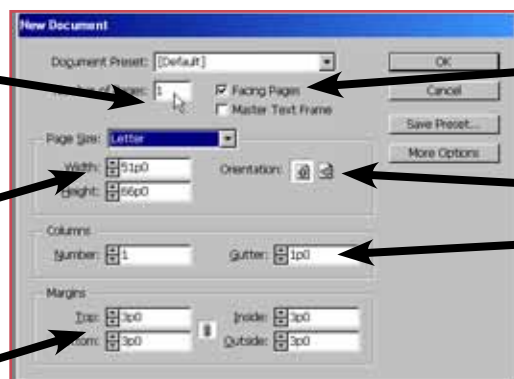
There are many preferences you can set up, such as the **unit** of measurement to use. Pica is the North American standard in printing, but the rest of the world uses cm or mm, while you are most likely used to inches!

Choose if grids will be on top of your work, or behind.

- Grids and guides will not print!

To view the Grids you have set up, go to <View / Grids & Guides / Show Baseline Grid> and / or

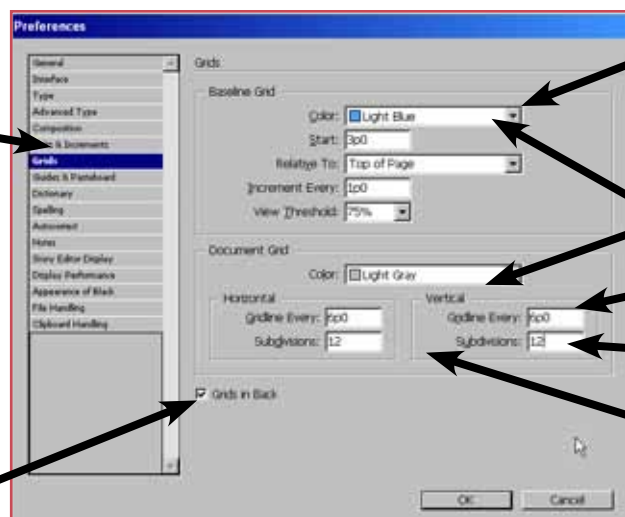
<View / Grids & Guides / Show Document Grid>.



Do you want to see two pages at a time (as in a book) or only one?

Landscape or portrait?

Choose how many columns per page, and the space between them (usually 1p or 0p6).

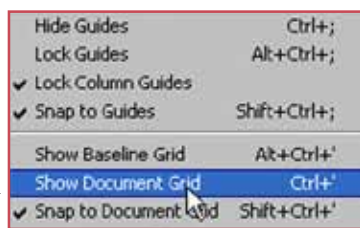


Baseline grids are evenly spaced horizontal lines. Good for newspapers and when using columns.

Choose any colour you like!

Guidelines will show up dark Subdivisions will be lighter in the grid

Document grids are evenly spaced lines. Good for creative layouts and even spacing.

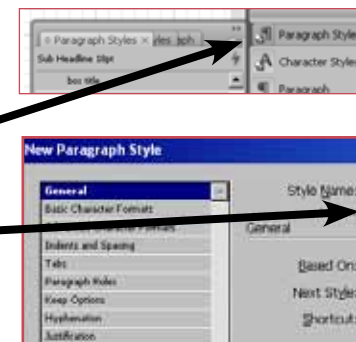


Also select: <View / Grids & Guides / Snap to Document Grid>. This makes it is easy line up all your objects.

PARAGRAPH STYLES

To Create a new Paragraph Style:

- This is the text you want to base your style on.
- Go to the Paragraph Styles Tab
- <Window/Type&Tables/Paragraph Styles>.
- Click on the small menu link.
- Give your new style a name.



NOTE: (Character Styles and Dropcaps)

- You can also create character styles (they are useful if you want to set up a drop cap).
- Procedure is the same as for paragraph styles, but does not include paragraph formatting.
- Dropcaps are set up by double clicking on the paragraph style and then choosing the size and character style of the dropcap.

MASTER PAGES

Items that you want to be identical on each page, or in a set locations each page, should be placed on the MASTER PAGE.

This is a special layer that will be identical and placed under each page you create in your document.

It is possible to create several master pages and then apply these to pages within your document.

Folios and page numbers should be on the master.

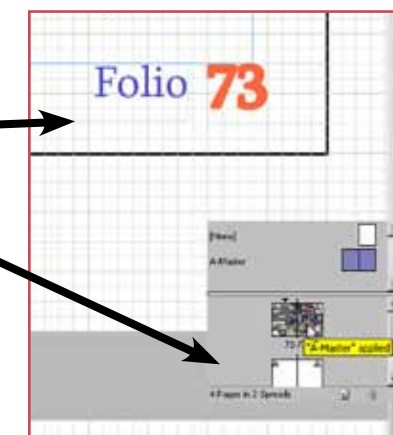
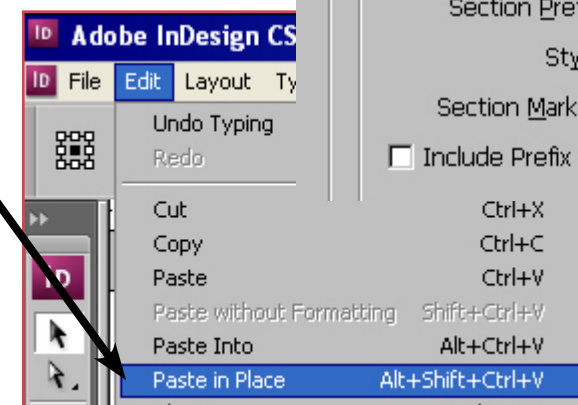
To create a folio:

- Switch to the master page using the Windows Tab <Window/Pages>.
- Click on the Master Page for your page.
- Anything you create here will show up on every page that uses that master.
- To insert an automatic page number <Type/Insert Special Character/Markers/Current Page Number> or <ALT+SHIFT+CTRL+N>.
- You should see an A which means the correct number will be placed automatically.

- To change your page numbering:
- Go to <Layout / Numbering and Section Options>.
- Change your page numbers. (Make sure you know which page you are on, or some unexpected things can happen!)
- If your folio is covered by objects, you can:
- Copy the Folio and <Edit / Paste in Place> it on the working page.

OR:

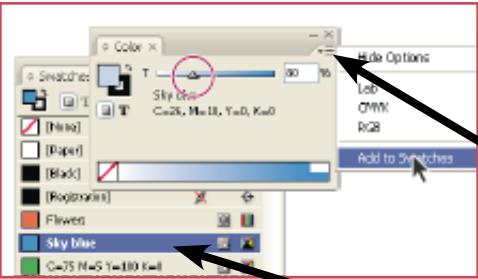
- Cut the object from the working page
- Paste in place on the master layer
- Move it to the back of the folio.



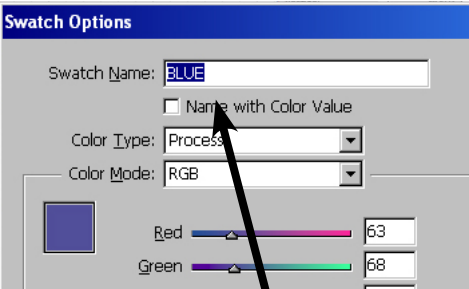
Starts numbering from that page - so make sure you are on your first page!

You can set prefixes or markers for different sections.

COLOUR SWATCHES



- To create a new swatch:
- Choose your colour in the **Colour Tab** <Window/Colour>.
 - Click on the small **menu link**.
 - Choose 'Add to Swatches'.
 - The colour will be added to your swatches.
 - The name will be the **CMYK** value.
- To give your new style a name:
- **Double click** on the swatch name in the **Swatches Tab**
 - Uncheck the box 'Name with Colour Value' in the dialogue box
 - Give your swatch a name and click **OK**.



GETTING READY TO PRINT AND SUBMIT

CHECKING LINKS, IMAGE QUALITY AND STYLES

LINKS

- InDesign will check **Links** when you open the file - if you get errors you have to relink images before getting ready to print.
- The **Links Tab** will show you errors <Window/Links>.
- **Yellow flags** mean the images have been changed - update them
- **Red Flags** are broken links and will not print correctly!
 - **Click** to repair.
 - Browse to locate & re-link.
- Use the icons at the bottom of the tab to **relink/update** the images.

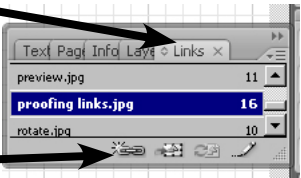
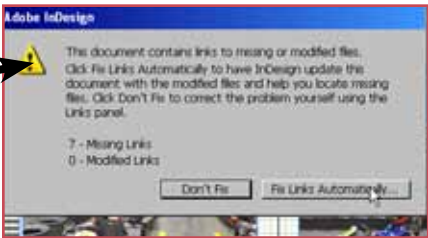
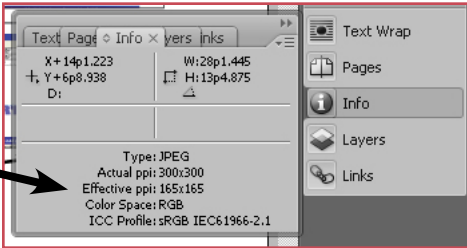


IMAGE QUALITY

- Images have to be high quality for printing - to check if they are OK:
- Select the image and see the **Info tab** or <Window/Info>.
 - **Effective ppi** has to be **250** for **B&W**, **300** for **colour**.
 - Both values have to be same or the image has been distorted.

TEXT STYLES AND COLOURS

- Select text boxes and open the **Paragraph Styles Tab**.
- A **+** next to a style means it has been changed.
 - Could be a **size** or **colour** change, or just a change in alignment.



FINAL CHECKLIST

PLEASE VERIFY ALL POINTS BELOW PRIOR TO SUBMISSION:

Convert all colours to CMYK

- *Optional: Manually convert all photos and images to CMYK. Photos should be converted in Photoshop. Any images left in RGB mode will be converted automatically and may not match the conversion tables on your computer.

Confirm all linked images are press-ready

- Images must be 300-350 dpi (scaling above 100% will cause error).

Remove all non-printing items

- Remove all non-printing items by deleting all objects outside of the printed area.

Layers

- Go to Window > Layers. In Layers window, click on the pull down menu, select Delete Unused Layers. Also remove any layers which contain elements not used in the final print job.
- Click again on the layers pull down menu, select Merge Layers.
- ***Only merge layers on your inside pages. Do not merge layers on your cover or dust jacket, or on pages that will have added elements such as silkscreen, foil or lamination.

Fonts

- To bypass submitting fonts, you can turn your fonts into vector graphics. First, select all objects. Then, go to Type menu > Create Outlines. This will make the text un-editable, but will also prevent delays in the case that an incomplete set of fonts are supplied.
- ***TIP: Keep a record of all fonts used. Because converted text is no longer editable as type, you may need your font files for future revisions.

Page Set up

- If pages were not created using the templates provided to you, ensure that each page is the correct size - 8 1/2" x 11" or 9 x 12".
- Ensure there is a bleed around all sides of your pages - at least 0.118 inches (0.9 picas)
- Ensure there is a slug at the bottom of each of your spreads - at least 2 inches (12 picas) and includes your school name and your job number.

Page Numbers

- If page numbers aren't included on every page as part of your design spread, please include them in the slug to ensure there is no confusion in the plant.

Provide one spread or multiple spreads per file.

- Do not submit single pages unless they are the first or last pages of your yearbook.

File Name

- Save files as Pages 002-006 for example. Use three digits in the number and do not include page names.

PACKAGE INDESIGN FILES

Save File

- Save File as Pages xxx -xxx

Go to File > Package

- Printing Instructions appear
 - Under File name, label the name appropriately, Pages xxx - xxx
 - Under Company type in your school name and Job # (your job number is listed in the slug of the templates we gave you.)
 - No need to fill out the rest of the information.

If no concerns:

- You will be prompted to save the entire file. Save it as Pages xxx - xxx Folder
 - Check the boxes marked: Copy Fonts, Copy Linked Graphics, Update Graphic Links in Pages, and Include Fonts and Links from Hidden Layers.
- Package

In most cases, concerns will arise:

- Under Fonts, ensure that the fonts chosen have an 'OK' status. Otherwise, select the appropriate fonts
- Under Links and Images, check that each link is CMYK, and Linked (if the box below, stating Show Problems Only is not checked, check this to reduce your list.) Any images left in RGB mode will be converted automatically and may not match the conversion tables on your computer.
- If your links have been modified, select them all and click Update
- If your links are missing, you will need to manually update them. To do this, cancel the packaging process. Open up your links palette under Windows. Select the links which show errors and Go To Link to see the image in question. Now, you must find the link. If it's on your computer, you should be able to Update Link. If it's not, you'll have to transfer it over.
- Now, proceed with the steps above to package your file.

FILE CONVERSION TO PDF

PLEASE VERIFY ALL POINTS BELOW PRIOR TO SUBMISSION:

Have all elements of your InDesign spread on the same computer

- If the spread was created on one computer, but exported on another, the links and fonts may not export, unless files are shared among all computers. You will receive a warning sign that fonts or links are missing if this is the case. To create ease and certainty when exporting, you may wish to package your InDesign files first. Please review the Packing InDesign Files sheet for further assistance.

Save your file

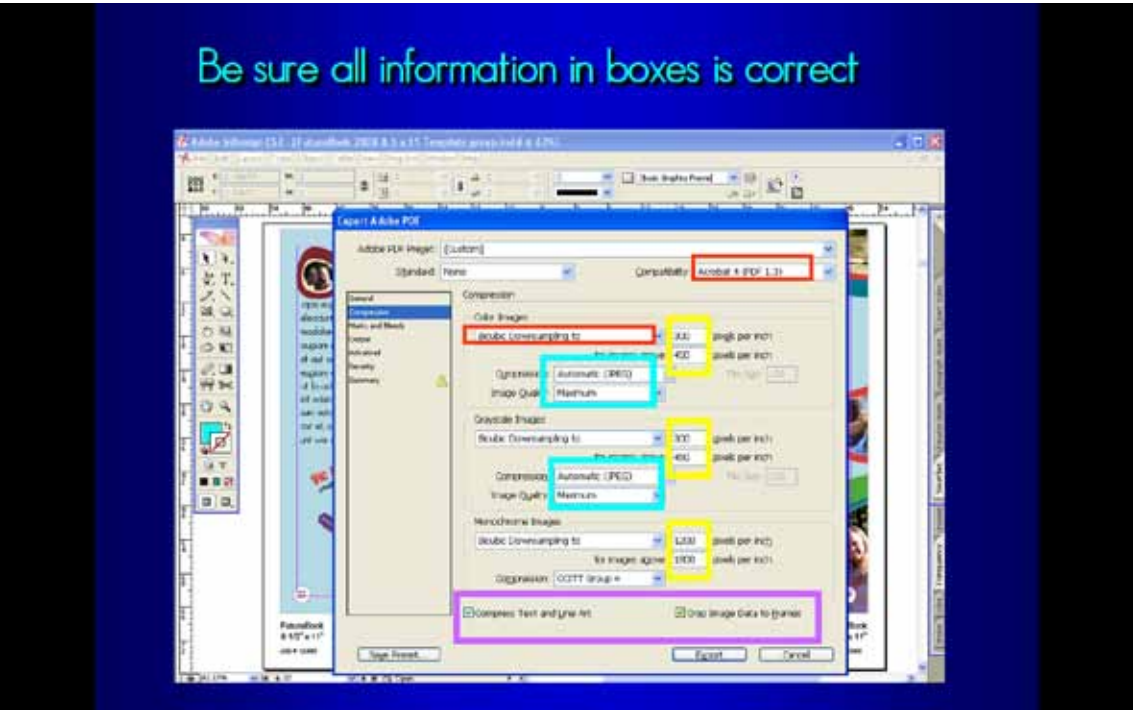
- Once your document is ready for submission, do a final save in InDesign.

Export your file

- Go to File > Export
- Chose a location and create a file name (Pages xxx - xxx)
- Chose Adobe PDF as the file type
- Click Save

Chose proper export settings

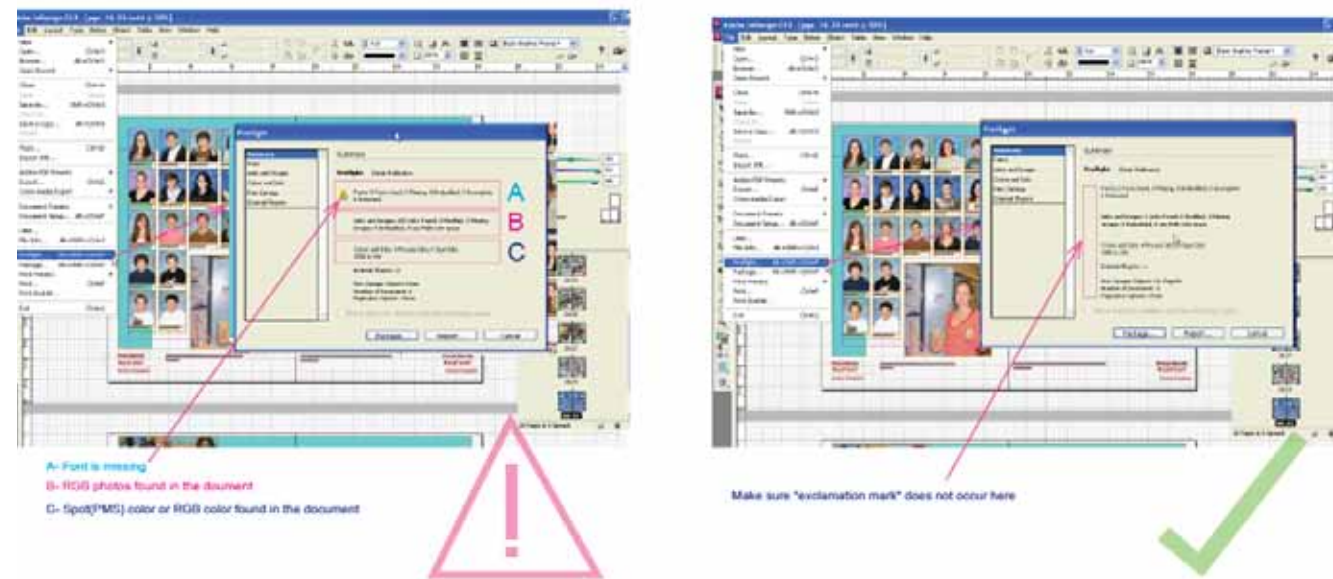
- Under General, chose the range of pages to export. Do not include pages not intended for printing
 - Check the box marked Spreads
 - Check the box to View PDF after Exporting so that you can double check your page
 - Check the box Optimize for Fast Web View
- Under Compression, ensure all information in boxes is correct:



- Under Marks and Bleeds, check the boxes All Printers Marks, Use Document Bleed Settings, and Include Slug area
- Under Advanced, select Transparency Flattener and choose High Resolution

Export

- Address any warnings that appear.



ADVANCED EFFECTS

Here are some popular effects and how to apply them.
The key is to try many settings and see what works best.

Check the last page for how to set up styles, so that you can duplicate the effects throughout your document.

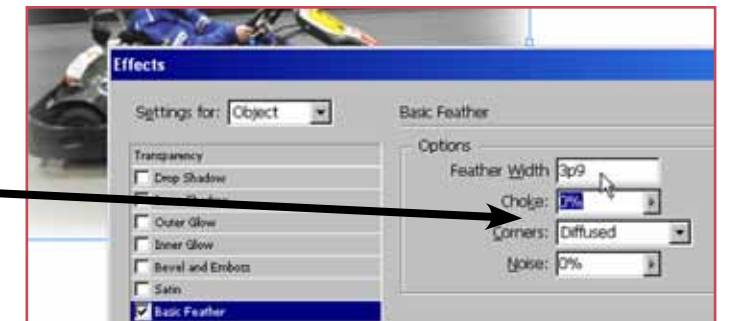
DROP SHADOWS

- Select object
- <Object / Effects / Drop Shadow> or <ALT+CTRL+M>.
- Change colour/parameters (Colour Direction, Size & Blur).
- You also can also apply a lot of other Photoshop effects here.



FEATHER

- Select Object
- <Object / Effects / Basic Feather>.
- Change feather width.
- Check the **Preview** box to see the effect.



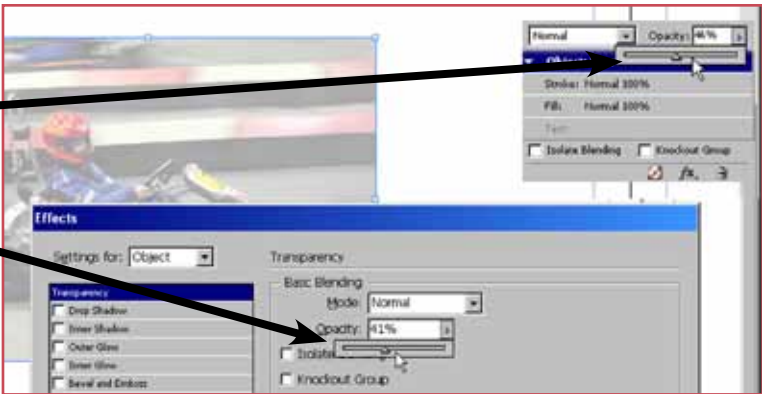
CORNER EFFECTS

- Select Object
- <Object / Corner Options>.
- Change Style & Width.
- Check <Preview> to see the effect.



TRANSPARENCY

- Use the **Transparency Tab** or **<Window/Effects/Transparency>**.
- Use the **slider** to adjust how much shows through an object.
- This is a good way to put captions over photos if you put the text in a semi-transparent text box.



COMPOUND IMAGES

You can group image frames and place photos in all of them at once, or create complex combinations of shapes and use them as image containers:

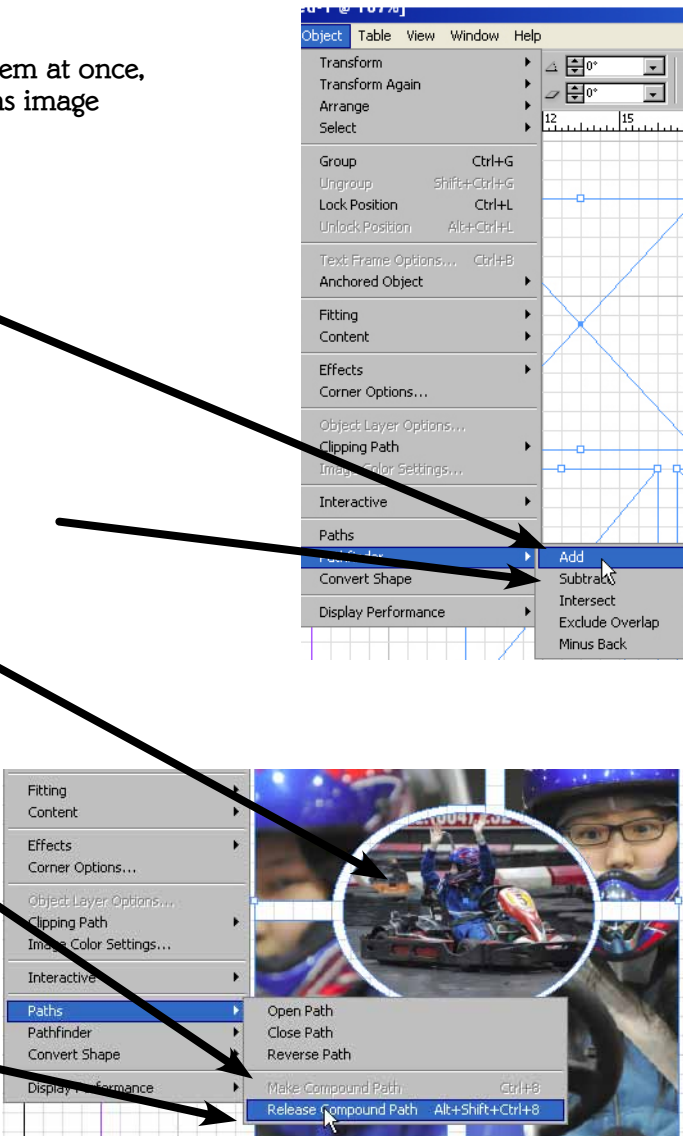
- TO CREATE COMPLEX SHAPES:
- Select all objects together (hold down shift and click)
 - Combine the objects **<Object/Pathfinder/Add>**.

- TO TAKE AWAY PART OF THE SHAPE:
- Place the shape you want to cut out on top of the other containers.
 - Select all objects together.
 - Cut out the shape **<Object/Pathfinder/Subtract>**.
 - Ready to place one image across multiple frames.

HINT: If you want to place an object into the shape you cut out, make sure to copy and paste the cutout shape and save it for placing the image later!

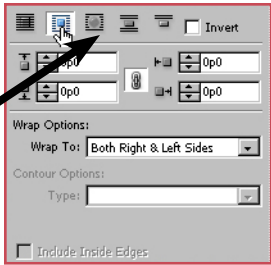
- TO HAVE ONE IMAGE FILL SEVERAL SHAPES
- Select all objects together and make one path **<Object/Paths/Make Compound Path>** / **<CTRL+8>**.
 - Ready to place one image across multiple frames.

- TO RELEASE images from the compound path
- **<Object/Paths/Release Compound Path>**.
 - Your image will stay in one of the shapes.



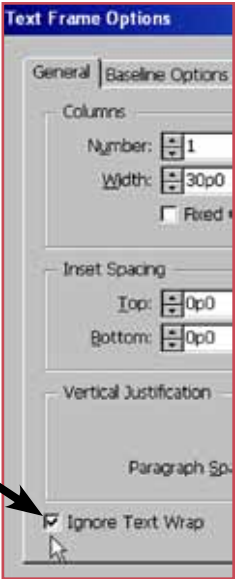
TEXT WRAP

- Select object.
- Go to **Text Wrap Tab <Window / Text Wrap>**.
- Choose the type of text wrap and offset value in the dialogue box.
- Create your own edges by creating new points with the **Pen Tool**.
- Move points with the **Direct Selection Tool**.



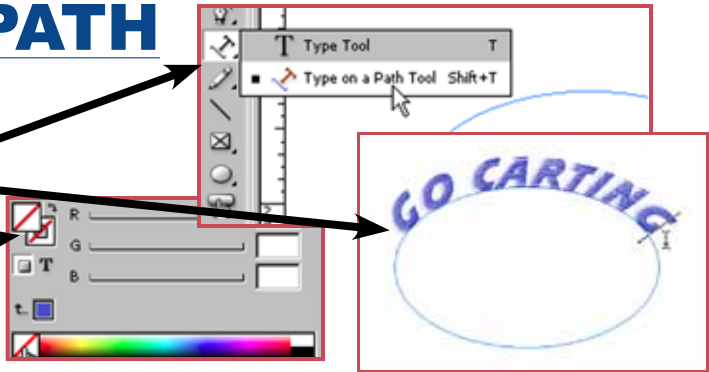
Ignoring Text Wrap

- If you do not want text wrap to apply a text frame:
- Select frame.



FITTING TEXT TO PATH

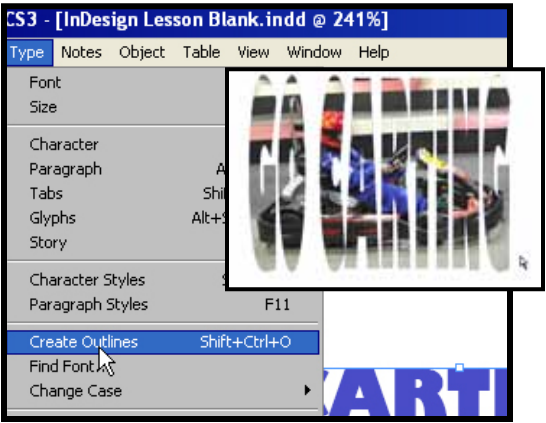
- Create the path (circle or line).
- Switch to the **Type on a Path Tool <Shift+T>**.
- Click on the **Path** to create a starting point.
- Type or **Paste** your text.
- Make the path invisible (no fill or stroke).



PHOTOS INSIDE TEXT

This is a great effect, but be careful because you won't be able to change the text once you have followed these steps.

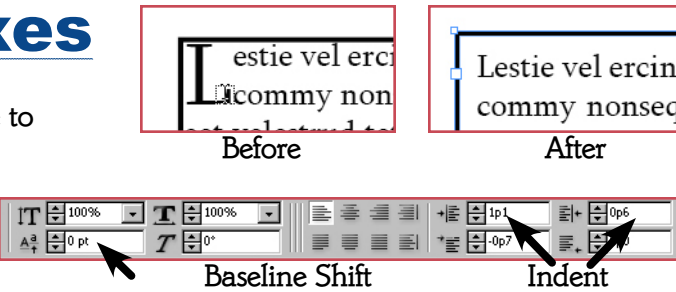
- Create your text.
- Convert it to a shape **<Type / Create Outlines>**.
- Resize the text to suit your design.
- Pull on nodes to change shape.
- Select the text with the **Direct Selection Tool**.
- Place your image in the outline **Ctrl+D** or **<File / Place>**.
- Now fit your image to the frame.



Fine-Tuning Text Boxes

Control spacing of text when the text in a box is too close to the edge of the box.

- Change the **Indent** to move over text.
- Change the **Baseline Shift** to move text up or down.
- Another solution is to create separate text box.



EXTRACTION AND CLIPPING PATHS (USING PHOTOSHOP)

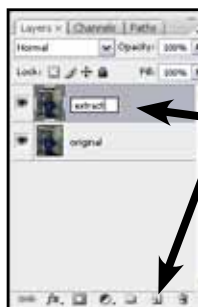
The effect everyone wants! Cutting objects out of their background and placing them on pages.

- Technically this is easy - the only challenge is in selecting and cropping the part you want in Photoshop.
- If you have CS3 or later, this is now much easier, using the Extract Filter and Refine Edge Tools.

- Open your image in PHOTOSHOP and **Crop** the image down to the part you want to use.
- **Duplicate your layer** so you have one as a back-up.

(Drag your layer onto the **paper icon** at the bottom of the **layer palette**.)

- **Rename your layers** (double click on name.)



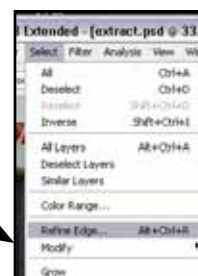
EXTRACT THE IMAGE

- Apply the Extract Filter **<Filter/extract>**.
- In the new window **zoom in** until you can see the edge clearly.
- Choose the **Edge Highlighter** (top tool).
- Make it wide enough to cover the whole edge.
- Enable **smart highlighting** to get a smaller edge.
- Use the **eraser** to make corrections (zoom in if you need to)
- When the entire image is outlined, **fill it** using the **bucket tool <g>**.
- If your whole image fills with colour, you have a gap in your outline you need to fix.
- Click **Preview** to see what it will look like.
- Use the **cleanup tools** to remove spots the filter missed, or add areas where it took too much.
- Click **<OK>** to apply the extracted filter.



REFINE THE EDGE

- **<CTRL+Click>** on the **extraction layer** in the **layers palette**.
- Make sure you are using the **original layer** and
- Choose **<Select/Refine Edge>**.
- In the **dialogue** use different previews to check the edge.
- Increase the **radius** to bring out detail.
- Increase **contrast** to fill in soft edge areas.
- Use **smooth** to round off jagged edges.
- Use the **contract** slider to increase and decrease size of selection.
- Click **<OK>** to apply the changes.



Your image is ready and cropped.
You can now create a mask or a path
if you want to use it in InDesign.

- **Create a new work path** (**path window**).
- Choose a tolerance (**0.5 pixels** works well).
- **Double click** on the path and **rename** it.
- **Create a clipping path** (**path window**).
- Choose your named path in the dialogue
- **Save** your file as a Photoshop (**.psd**) file.
- Switch to InDesign and **place** your picture.
- Select and adjust the **text wrap** style and distance as needed.

