

InDesign

Professional Typography
with Adobe InDesign

THIRD EDITION

Type

I see her father, aged and bent, but other-
stored, and faithful to all men in his healing office and a
see the good old man, so long their friend, in ten years'
enriching them with all he has, and passing tra
to his re... that I hold a sanctuary in their hearts and in
the... I see her, a... wom
... and her hu... their
... done, lying side by side in the... earthy
*and I know that each was not more honoured and held sacred in the ot
ner soul, than I was in the... of both. "I see... at child
d who lay upon her... som and who... ore m
name, a man winning Nigel French his way
at path of life which once was mine. I see him winning it so we
y name is made illust... there by the light of his. ... the blo
THREW UPON... ADED AWAY. I SEE HIM, ... RE-M
st judges and he... men, bringing a boy of my name, with a... tr
nd golden hair, to this place—then fair to look upon, with not a trace of this day's disfiguremen
"It is a far, far better thing that I do, than I have ever done;
it is a far, far better rest that I go to than I have ever known."*

InDesign Professional Typography with Adobe InDesign THIRD EDITION Type

Nigel French



InDesign Type: Professional Typography with Adobe® InDesign®, Third Edition

Nigel French

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Foreword

Want to drive a designer crazy? Show them some poorly typeset text with too-tight spacing between words and uneven spacing between letters. They cringe because they literally *feel* it's wrong — it's a sensitivity much like slipping into a bubble bath only to find that someone has left behind a thin layer of sand. Designers want to go one step further: They want to fix it, make it right, resolve the dissonant chord, clean up the mess.

Design — and especially the design of text, called typography — is something that anyone can learn. It involves two steps: developing the feeling, and learning how to make type better. Having “the eye” (the feeling for type) leads to misery if you don't know how to handle the tools to change it. And understanding the software is meaningless if you don't know what you're looking for.

Fortunately, I'm pleased to say that this book can help you do both. I've known Nigel French for many years, and I can tell you that he is one of the top typography trainers in the world, specifically because he understands the importance of “the eye” and the tools typographers need to master to transfer what they see to the page.

Adobe InDesign is the industry's best tool for setting type in short and long documents, for print and onscreen display. The more you know about InDesign, the more fun it is to use it — especially when you have a teacher like Nigel.

— David Blatner
co-host, InDesignSecrets.com
co-author, *Real World InDesign CC*

Introduction

Today we are all typographers. Everyone knows what a font is, and most people have an opinion about the fonts they like and those they don't. Typography is no longer an arcane trade plied by curmudgeonly men with inky fingers, but rather a life skill. We make typographic decisions every day: the material we choose to read in print and onscreen, the fonts we select for our correspondence, and the advertising we respond to, consciously or subconsciously.

This democratization of typography is empowering; anyone can participate. But to participate well it helps to know a thing or two; with power comes responsibility. If you're using InDesign, or plan to, then you have at your disposal the state-of-the-art software for creating typographic layouts of any length and complexity. It's worth bearing in mind that the concepts behind InDesign didn't just arrive simultaneously with the program's launch in 1999. InDesign itself may be a mere pup, but the principles upon which it is built are part of a long tradition. InDesign is part of a continuum of technological advances going back to the fifteenth century with the invention of movable type. The terminology and typographic conventions upon which InDesign is built have evolved over generations. The typefaces on our font menus — even the funky postmodern ones — are clearly related to the letter shapes chiseled into the Trajan Column in Rome nearly 2000 years ago.

Whether you're new to InDesign or have been using it for some time, you've probably found yourself wondering: What are all these controls? Where did they come from? And, perhaps more important: How do I use them, and why? This book attempts to answer these questions. It's not just a book about working with InDesign. Because I believe it's impossible to talk about InDesign without discussing typographic history and best practices, it's also a book about why certain type solutions work better than others.

If you're working in InDesign today, you're probably at least thinking about designing EPUBs and digital magazines. With each new release, InDesign is getting better at creating documents in these digital formats. If you're working with an older version of InDesign, my advice is to upgrade. The majority of the new features and enhancements since version 5.5 relate to digital publishing. This third edition addresses how InDesign's toolset has been adapted and extended so that we as typographers can produce professional-quality digital, as well as print, layouts.

Designing with type is a subjective discipline, so it's useful for you to know where I'm coming from and why I'm advancing the opinions I am. I'd say that my type preferences are more "old school" than experimental, my style more conventional than boundary pushing. I admire graphic designers who break the rules of type and do it well; I groan when I see graphic designers breaking the rules and doing it badly. Unfortunately, I think the majority of graphic designers that break the rules fall into the latter camp.

It's an oft-repeated adage that good typography is "invisible," meaning that, rather than drawing attention to itself, typography should serve the words it represents. As Stanley Morison, who in the 1930s brought us Times (the font designed for the *Times* of London, although the newspaper no longer uses it), said, "For a new fount to be successful it has to be so good that only very few recognize its novelty."

This perhaps makes typography sound like a thankless task. Where's the fame? The glory? There are few celebrity typographers, and those few walk the streets in relative anonymity. Nonetheless, typography is a noble cause. If typefaces are the bricks and mortar of communication, then we, the typographers, are the architects. A simple and understated building may pass unnoticed by many, but everyone notices an ugly one. Likewise with typography: Good designs serve their purpose and may not elicit comment, but we can all spot bad typography, even though we may not be able to say why it's bad. *InDesign Type* exists to demonstrate the rules and conventions of professional typography, specifically as they

relate to InDesign, so that we can avoid ugly and thoughtless type — which, I believe, is a major step in the direction of creating beautiful type.

Who Should Read This Book?

This book deals with English-language typography — not because it's the most important, but because it's what I know. It's primarily concerned with the typographic conventions of magazine and book publishing, whether those books and magazines are intended to be read in print or onscreen. The techniques in this book will help you create pages and layouts to a professional standard by following certain typographic “rules.” To this end, my approach is utilitarian rather than experimental. These rules are not intended to be stifling or limiting to creativity, but rather are intended as a starting point. Learn the rules. Then, if you choose, break them — but break them consciously, knowing why you do so. Whatever you do, don't ignore them.

I should also mention that although it was written specifically for Adobe InDesign CC, most of the techniques in the book are applicable to earlier versions of InDesign. Where there is a keyboard shortcut for a command, I indicate the Macintosh shortcut first, followed by the Windows shortcut in parentheses. For example: Cmd+Option+W (Ctrl+Alt+W).

I hope you find *InDesign Type* a useful addition to your design bookshelf. If you enjoy the book, you might be interested in viewing my “InDesign Typography” course on Lynda.com, which is structured in much the same way as the book and uses many of the same examples.

I'm keen to get your feedback, so please email me with any comments, corrections, or suggestions.

— Nigel French
nigel@nigelfrench.com

CHAPTER 4

Leading

Leading (pronounced “ledding”) is the space between lines of type. The term comes from the days of hot-metal typesetting when thin strips of lead, known as *reglets*, were inserted by hand between the lines of type to add vertical space. Lines of type without these strips of lead were — and still are — referred to as “set solid.” Leading plays a big part in the readability of text. Body text is usually made more readable by a positive amount of leading (a value greater than the point size of the type). Headlines and display type, however, may benefit from negative leading. When it comes to screen type, leading is usually referred to as *line height*.

**Was this the face
that launched
a thousand ships,
And burnt the
topless towers
of Ilium?**

The positive leading is indicated here in red. The total leading is measured from the baseline of one line to the baseline of the next.

I told you that you knew the answer already. Everyone knows it. The thing that is in Room 101 is the worst thing in the world.

A Hoefler Text 9.5/Auto (11.4)

The thing that is
in Room 101 is
the worst thing
in the world.

B Hoefler Text 17/Auto (21.6)

The thing that is
in Room 101 is
the worst thing
in the world.

C Hoefler Text 17/18

RELATIVE LEADING SIZES

A: Positive leading works OK for body text sizes.

B & C: As the type gets bigger, proportionally less leading is needed.

Getting the Lead Out

When it comes to leading there's no "one size fits all." Tight leading increases the density of the type and gives it authority. But if you go too tight, your type looks claustrophobic and the descenders of one line collide with the ascenders of the next. Loose leading can create a luxurious look. But if it's too loose, the lines of type look like individual strips rather than cohesive paragraphs and the type is made less readable. This is especially true if the leading value is greater than the size of the space between the paragraphs.

Leading is measured in points from one baseline to the next. The leading value includes the point size of the typeface and the actual space between the lines. Thus, 10-point type with 12 points of leading really means two points of space between each line. This is written 10/12, and spoken "10 on 12." Other common type size and leading combinations for print body text are 9/11, 11/13, and 12/15.

How Much Is Enough?

Bad leading makes your text harder to read because the eye has trouble locating the next line of type. Choosing an appropriate amount of leading depends on several variables:

- **The nature of the text.** While text intended for continuous reading benefits from some breathing space, a short burst of advertising copy or a title might be more effective if the lines are tightly led.
- **Type size.** As type size increases, you will want proportionally less leading. With display sizes, the same relative amount of space between the lines appears larger, so much so that it's common to use negative leading for display type.
- **The width of the column.** Increase leading as you increase column width, or *measure*. Increasing the leading anywhere from 0.5 point to 2 points improves readability by keeping the lines distinct and preventing the eye from dropping off to the line below or doubling back to reread the same line.

One of London's most
Battersea Power Sta
an uncertain future.
majestic four-chimn
ette, Battersea Pow
London with electri
and 1983. Designed
Scott, whose other
include Waterloo B
telephone box, and

One of London's
landmarks, Batt
Station now face
future. Admired
majestic four-ch
silhouette, Batt
Station supplied
electricity betw
1983. Designed

Type that reverses out of a solid color benefits from increased leading (right) as well as an increase in weight.

Top Hat,
White Tie
& Tails

Top Hat,
White Tie
& Tails

LEADING AND X-HEIGHT

Even though Bernhard Modern has elongated ascenders, it has a low x-height and short descenders, and so can be leaded tightly (bottom).

- **The color of the background.** We're used to reading black type on white paper, so when we use the opposite, we're guaranteed to get attention. However, reversed type tends to "sparkle," making it harder to read. A slight increase in leading can compensate. In addition, if you're working in print, avoid delicate serifs and consider using a heavier weight.
- **The characteristics of the typeface.** Typefaces with larger x-heights are perceived as bigger than other typefaces at equivalent sizes. The lowercase letters are large relative to the size of the overall character, and thus require more leading.

Didone (also called Modern) typefaces that have a strong vertical stress, like Bodoni, guide the eye down the page rather than across the line. Adding more leading with these typefaces keeps the eye tracking horizontally rather than vertically.

Typefaces that combine a low x-height with particularly tall ascenders require special treatment. The low x-height begs suggest tighter leading, but tighter leading might cause the ascenders and descenders to collide. Much depends on the characters themselves. If you're working on display type, rewording — if you have editorial license — might make all the difference. Let common sense prevail, and be open to the possibility that colliding ascenders and descenders might even look good in certain situations.

Leading Shortcuts

To tighten the leading of a selected range of text: Option+Up Arrow (Alt+Up Arrow)

To loosen the leading: Option+Down Arrow (Alt+Down Arrow)

The increment is determined in the Size/Leading field in the Units & Increments Preferences. To increase or decrease the leading value by five times this increment, press Cmd+Option+Up Arrow (Ctrl+Alt+Up Arrow) or Cmd+Option+Down Arrow (Ctrl+Alt+Down Arrow).

Pour and drink; and according to your choice of goblet, I shall know whether or not you are a connoisseur of wine. For if you have no feelings about wine one way or the other, you will want the sensation of drinking the stuff out of a vessel that may have cost thousands of pounds; but if you are a member of that vanishing tribe, the amateurs of fine vintages, you will choose the crystal, because everything about it is calculated to reveal rather than hide the beautiful thing which it was meant to contain.

Perpetua 9/11

Pour and drink; and according to your choice of goblet, I shall know whether or not you are a connoisseur of wine. For if you have no feelings about wine one way or the other, you will want the sensation of drinking the stuff out of a vessel that may have cost thousands of pounds; but if you are a member of that vanishing tribe, the amateurs of fine vintages, you will choose the crystal, because everything about it is calculated to reveal rather than hide the beautiful thing which it was meant to contain.

10/12

Pour and drink; and according to your choice of goblet, I shall know whether or not you are a connoisseur of wine. For if you have no feelings about wine one way or the other, you will want the sensation of drinking the stuff out of a vessel that may have cost thousands of pounds; but if you are a member of that vanishing tribe, the amateurs of fine vintages, you will choose the crystal, because everything about it is calculated to reveal rather than hide the beautiful thing which it was meant to contain.

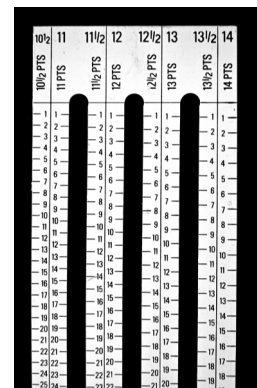
11/13

Pour and drink; and according to your choice of goblet, I shall know whether or not you are a connoisseur of wine. For if you have no feelings about wine one way or the other, you will want the sensation of drinking the stuff out of a vessel that may have cost thousands of pounds; but if you are a member of that vanishing tribe, the amateurs of fine vintages, you will choose the crystal, because everything about it is calculated to reveal rather than hide the beautiful thing which it was meant to contain.

12/15

COMMON LEADING AND TYPE SIZE COMBINATIONS

An excerpt from Beatrice Ward's influential 1930 essay on typography, "The Crystal Goblet."



A leading gauge lets you measure the leading value on a printed piece.

TIP: A convenient rule of thumb for determining leading is to take the width of a column in picas and divide it by the size of the type, then round the result to the nearest half point. For example, 10-point type on a 24-pica measure yields a leading value of 2.4. This is rounded up to 2.5 and expressed as 12.5 (the lead added to the point size).

The quick brown fox jumps over the lazy dog

Helvetica Neue Bold Condensed 24/26

THE QUICK BROWN FOX JUMPS OVER THE LAZY DOG

Helvetica Neue Bold Condensed 24/22

LEADING TYPE IN ALL CAPS

The same headline in all caps needs less leading because there are no descenders.

We are met on a great battlefield of that war. We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation

THE PROBLEM WITH AUTO LEADING

120% of what exactly? Because one character (a space at the end of line 5) is larger than the rest of the paragraph, the leading is inconsistent.

Typefaces with small x-heights appear to have more horizontal space between lines and thus require less leading.

Bold and Semibold typefaces benefit from extra leading to prevent the *type color* — the density of the letterforms as a block — from appearing too heavy.

Type in all caps requires less leading because the absence of descenders makes the lines appear farther apart.

Screen Leading (Line Height)

The W3C accessibility guidelines recommend a line height of 1.5 ems. While this is a good starting point, it's not a figure that should be adhered to slavishly. Just as with print, optimal line height onscreen is a nuanced thing, and should factor in the size of the type, the length of the line, the x-height of the typeface, and the perceived preferences of the audience. While it's broadly true that line height onscreen will be more than its equivalent in print (in part because line lengths onscreen tend to be longer), all of the factors discussed above are as applicable to screen typography as they are to print typography.

(Not) Using Auto Leading

Auto Leading is a relatively new concept, emerging with desktop publishing in the mid-'80s. InDesign's Auto Leading value is by default 120 percent of the type size, although you can change this in Justification options. You can spot Auto Leading on Control panel or Character panel because the value is in parentheses.

While Auto Leading just about works for body text, it usually looks awful applied to display type, causing the lines to appear too far apart. Auto Leading is one of those default, works-OK-most-of-the-time-if-all-you're-doing-is-designing-a-newsletter-for-the-local-scout-troop features. It is not a tool of the professional designer.

The best thing you can say about Auto Leading is that it's convenient. You can change your text size as often as you like and your type will always be readable. As your font size increases or decreases, so does your leading.

Type Type

x-height

If books are printed in order to be read, we must distinguish readability from what the optician would call legibility. A page set in 14-pt Bold Sans is, according to the laboratory tests, more *legible* than one set in 11-pt Baskerville. A public speaker is more *audible* in that sense when he bellows. But a good speaking voice is one which is inaudible as a voice. It is

Adobe Caslon Pro 10/12

If books are printed in order to be read, we must distinguish readability from what the optician would call legibility. A page set in 14-pt Bold Sans is, according to the laboratory tests, more legible than one set in 11-pt Baskerville. A public speaker is more audible in that sense when he bellows.

Helvetica 10/13

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Bodoni 10/12.5

This may sound like a good idea, but Auto Leading is actually proportional to the biggest piece of type in the paragraph. This means that if you have just one character larger than the rest of the paragraph, your leading value will be 120 percent of that character. This problem most often occurs at the end of the paragraph. Here's the scenario: The user selects the type by swiping, and unknowingly excludes the hidden paragraph mark at the end of the paragraph. They reduce the size of the type but not the size of the paragraph mark, with the result that the last line of the paragraph has more leading than the rest of the paragraph. You can avoid this by selecting paragraphs with four clicks, ensuring that the paragraph mark is part of the selection and so takes on the same formats. It's also a good idea to work with hidden characters shown (Type > Show Hidden Characters, or Cmd+Option+I/Ctrl+Alt+I), to see exactly what *is* — and what *isn't* — selected. Even with such precautions, it's still best to avoid Auto Leading.

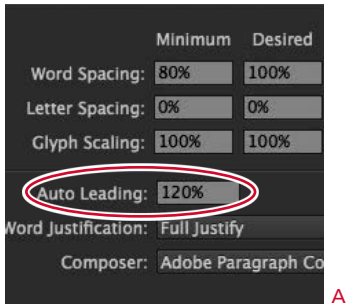
In a nutshell, Auto Leading doesn't give you the control that you need. If you're using 10-point type, Auto Leading is 12 points, a nice easy number to work with. However, if you're working with 11-point type, then your leading value is 13.2, which is difficult to calculate in multiples if you intend to work with a grid — see Chapter 16, "Pages, Margins, Columns, and Grids."

Typefaces with a larger x-height, like Helvetica, require more leading. Didone or Modern typefaces that have a strong vertical stress, like Bodoni, require more leading to keep the eye moving along the line rather than down the page.

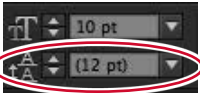
Colorful vintage
matchbook designs
advertising the
Flying Rani.

LEADING AND X-HEIGHT

Even though Raniscript has elongated ascenders and descenders, its low x-height means it looks good tightly leaded.



A

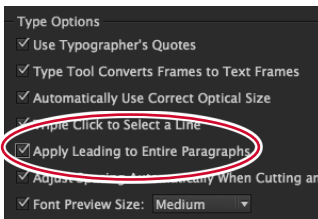


B

AUTO LEADING

A: By default the Auto Leading value (Justification dialog box) is 120% of the point size of the type.

B: When Auto Leading is chosen, the value appears in parentheses on the Control panel.



The Apply Leading to Entire Paragraphs preference keeps the leading within a paragraph consistent.



Good leading gone bad: The columns are balanced—but at the expense of inconsistent leading across the two columns.

Auto Leading and Inline Graphics

Auto Leading does have a legitimate use: when you're using inline objects. These are frames (usually, but not exclusively, picture frames) that are dragged or pasted into a blank paragraph in the text and thereafter move with the text flow. If the text makes specific reference to figures above or below, those figures can be inline graphics, so that the relationship between text and graphic is never disrupted by edits to the text. Inline graphics are a hybrid of text and graphics: You control their vertical spacing with leading. Auto Leading ensures there's always enough space for the graphic on the line, since the leading value increases or decreases according to the height of the graphic. When working with inline graphics, make a paragraph style with a leading value of Auto (you may wish to adjust the percentage of the Auto Leading) and apply this to the blank-line paragraphs into which the graphics are dragged or pasted.

The “Apply Leading to Entire Paragraphs” Preference

Whether you're working with Auto Leading or absolute leading, the height of a line is determined by the largest piece of type on that line. This can cause inconsistent leading if you mistakenly have one character bigger than the rest. You can change this behavior in your Type preferences by selecting Apply Leading to Entire Paragraphs. This means only one leading value can be applied to any given paragraph. Changing this setting does not affect the leading in existing frames.

This is arguably a useful “safety” feature, but I feel it gives too much control to the software. While we want only one leading value per paragraph most of the time, there are occasions—such as working with display type—when we need to control leading line by line. In such situations, we want mixed leading values to give the optical effect of consistency—something not possible with this preference turned on.

Olesequat magna fei faci blam dolorem
zzrit nosto euip ea adigna faccum
velit autet lummod tem quametum
quamcommod dolore molor sit, quat vent
il et nonse commod tat iureet irit lortie
dolorercin volobor peratueros nulpul
laor sed dolum ad magnim incilit wisi
bla facipit. Endrem illa fei feumny nibh
ercillam iure digna faccum ing eniamet

lore exer in etue modolore veliquat ipisl
dolessequat. Put in ut alis ad molor
sunsandigna feiupsu sciduisim acidunt
nulla alis alisi. Perostrud tem eniametum
quiscil. ■

Keep It Consistent, Except ...

Leading, like much in typography, is about rhythm, and as with a piece of music, you want your rhythm to be steady and unflinching. The best way to achieve this is to set the leading values within paragraph styles. Should you need to change the leading values, you can edit the style definition rather than work on the text locally.

When it comes to fixing widows and orphans, don't mess with the leading. You have other tricks up your sleeve — rewriting, tracking, adjusting word and letter spacing, discretionary hyphens, forced line breaks — to fix such problems. Tempting though it may be to tighten the leading a little here and there, your document will suffer if you do. Keep your body text leading consistent; otherwise, the rhythm of your type will wander like the beat of a distracted drummer.

Also, don't be tempted to go for the quick 'n' dirty solution of using vertical alignment, which increases the leading in a short column to make it bottom out (that is, end on the same baseline as other columns). While columns of uniform depth are preferable in continuous prose, InDesign can achieve this with the Balance Columns feature, which adjusts the height of all columns rather than just extend the shortest one.

There may be times when you need to relax consistency in favor of optical leading and tweak the leading of individual lines to make the leading *appear* more consistent. Such a situation may arise in display type if one line lacks descenders.

When Leading Gets Ignored

There are two scenarios when your leading value is overruled:

Baseline grid. If your text is aligned to a baseline grid, the grid increment trumps your leading value. For example, if you have a 12-point baseline grid and you increase the leading of text aligned to that grid to 13 points, the leading rounds up to the next grid increment of 24 points. See Chapter 16, “Pages, Margins, Columns, and Grids,” for more details.

Vertical justification. The Text Frame Options dialog box (Cmd/Ctrl+B) contains the Align pop-up menu, which you

The only way
to get rid of a
TEMPTATION
is to yield to it.

A

The only way
to get rid of a
TEMPTATION
is to yield to it.

B

— Oscar Wilde. *The Picture of Dorian Gray*

USING OPTICAL LEADING

A: Because there are no descenders for line 3, the leading between lines 3 and 4 appears bigger.

B: The leading for the fourth line has reduced to compensate for there being no descenders on the line above.

ia aut porepuda	ia aut porepuda
ae repuda simu	_____
to exerae veleca	ae repuda simu
rs ides est voluq	_____
isciis reserum fi	to exerae veleca
o blaccus sitatei	_____
rtiissu ndipidus	rs ides est voluq

A

B

A: Memphis Medium 10/12, aligned to grid

B: Memphis Medium 10/12.1, aligned to grid

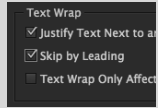
LEADING AND BASELINE GRIDS

When using a baseline grid, the grid increment trumps the leading value, as in the right column. Increasing the leading causes the lines of the paragraph to snap to the next available grid increment.

Skip by Leading

There's a (deservedly) overlooked preference that determines how leading is affected by a text wrap. Choose Preferences > Composition and select Skip by Leading to make text below a wrap object move to the next available leading increment. The purpose of this is to achieve cross alignment of your baselines. This sounds like a good idea, but Skip by Leading works only when the text goes over—not around—the wrap object. Also, if the wrap object is at the top of the column, the preference is ignored.

While it won't do any harm to have Skip by Leading turned on, it has little benefit. You're better off using a baseline grid to achieve the same effect.



Skip by Leading Off

Skip by Leading On

can use to force your text to vertically align within its text frame. Choose Align > Justify, and the leading value becomes irrelevant. The text fills the vertical space of the frame, regardless of how much space it has to add between the lines to do so—almost always a bad idea. To use vertical justification without overriding your leading values (a slightly better option), increase the Paragraph Spacing Limit so that InDesign can add space between the paragraphs instead of between the lines of text. See Chapter 7, “Alignment.”

Leading is one of the most important factors contributing to the readability of text. It ain't rocket science, but there are a number of variables to consider. While there's no single “right” leading value, there are plenty of inappropriate amounts. To sum it up: Avoid Auto Leading (except for inline graphics), think about the purpose—as well as the characteristics—of the type you're working with, and exercise a strong degree of common sense. And always trust your eyes.

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