Introduction to Layout with InDesign

InDesign is a powerful Desktop Publishing (layout) application. It is flexible enough so that it can be used by both new and experienced users because there is no single, correct way to lay out pages. InDesign can handle sophisticated tasks such as glossy magazines and high-impact ads, but its structured approach to publishing also makes it a good choice for newspapers, newsletters, and books. It can also be used for corporate publishing tasks such as proposals and annual reports.
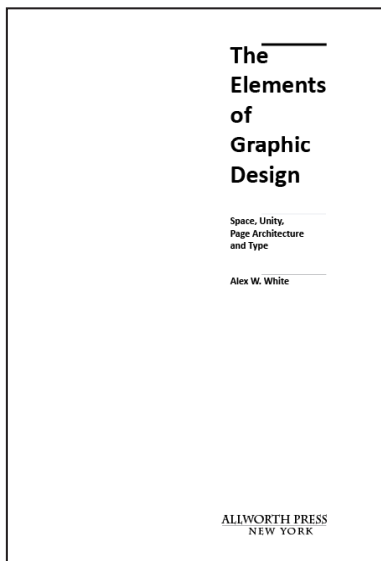
In all cases, you can design for printing on paper or for digital distribution as Adobe Acrobat Portable Document Format (PDF) files. You can also use InDesign to create Web and Flash documents. These documents can include interactive features such as page transitions, hyperlinks and buttons to play sounds or a movie.

Tutorial Summary
You will be creating an InDesign file which will consist of several Masters (templates) that will contain the main graphics and headings which are common to each style of page layout. You will then place your images into this InDesign file.   Use the instructions below to help you get started.

Prepare a Concept Design for your Presentation Boards
- You need to make a sketch of your ideas for the layout of your pages by hand before you begin designing in InDesign. This layout concept sketch is your starting point and helps you organise your digital page layout.
- Look at the sample pages below. You will reconstruct these page layouts for this exercise.
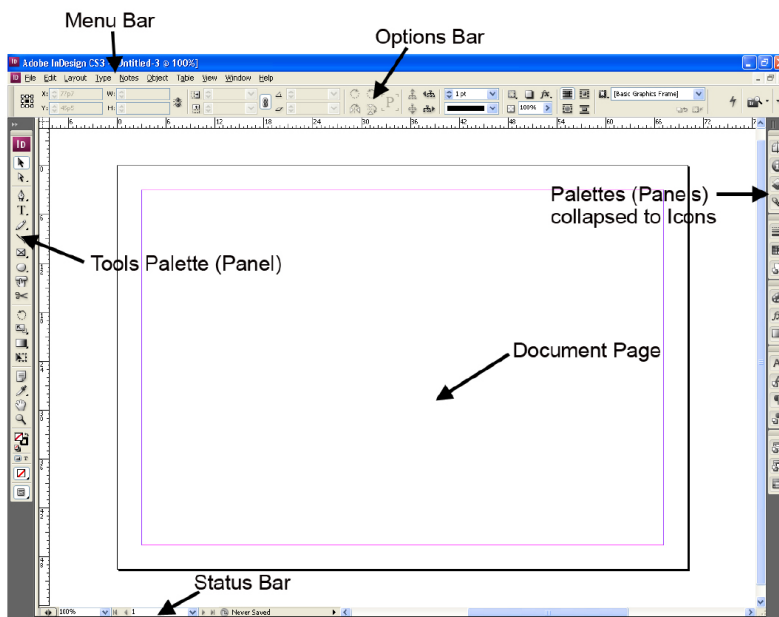

Page 1

Page 2

Page 3

Menu Bar

Options Bar

Palettes (Panels)
collapsed to Icons

Tools Palette (Panel)

Document Page

Status Bar

The Screen Workspace

The Menu Bar is the row across the top and organises commands under menus.

The Options Bar appears below the Menu Bar at the top of the workspace. The options bar is context sensitive—it changes as you select different tools.

The Tools Palette (or Tools Panel) sits on the left hand side and can be moved by dragging on the top of the panel. If you hover the cursor of your mouse on top of each Tool in the Tools Palette, the name of that tool will appear.

The Palettes (or Panels) in InDesign are on the right. They click neatly under one another and are moveable. If you hover over a Palette Icon, the name of that palette will appear. It is useful to learn the "Icons" for each of the Palettes so that you can quickly recognise and access them. If you can't see a particular palette that you need, open it by selecting Window> "palette name" from the Menu Bar. Most palettes open in group of more than one palette. You can drag a palette out of a group by dragging the palette's "tab" to a different location on the screen. The Palette will then sit on its own.
To close palettes click the "x" (close) button at the top right of the palette. When you do this, if the palettes are grouped the whole group will close.

Creating and Setting up Your Document
- From the Menu Bar select **File>New>Document**
- Set Number of Pages to **4**
- Tick "**Facing Pages"** to view the two pages of a book next to each other.
- Untick "**Master Text Frame**" because we will have varying pieces of information (text and images) on each page.
- In the dialogue box Set the settings to:
  - width = 15cm
  - height = 23.5cm
  - orientation = portrait (press the portrait button)
  - columns = 1
  - gutter - 0.4233cm
  - margins = top 1.5cm; bottom 1.27; left 0.8cm; right 1.5cm.
- Click "Save Preset" and name your layout "book". Click OK to save.
- Click **OK** to create the new document. A new document will open with a white background layer and with the specified number of pages.
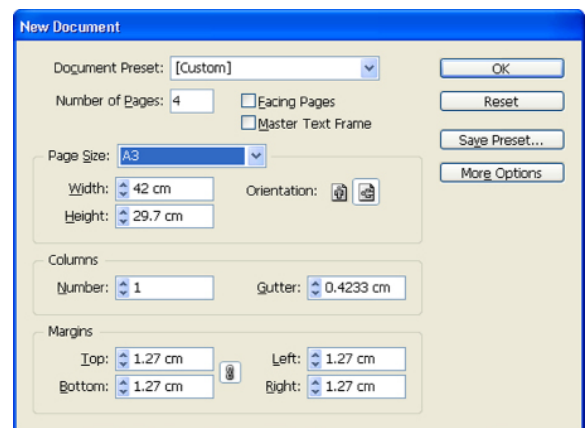

View the Rulers
- If you cannot see the **Rulers** around your document, from the Menu Bar select **View>Rulers** (or press ⌘ **R**).

Setting the Units of Measurement
- To set Units of Measurement, right click somewhere inside the top ruler, scroll down to the required unit and click to activate it. Do this again for the left hand side ruler.

Setting the Margins
- From the Menu Bar select **Layout>Margins and Columns**. This feature will set the margins FOR THIS PAGE ONLY. If you want to set margins for multiple pages, select them first in the
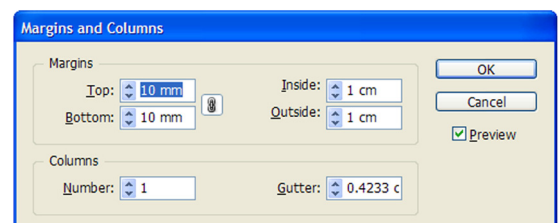
Pages Palette.
- You can set all the margins in this menu.   If you need to set margins that are not all the same, press the "**chain**" button to unlink the settings.
- For this document, make sure the chain is active and set the margins to **1cm**.

Navigating your Document
There are several ways to zoom and pan in your document
- Activate the **Navigation Palette** where you can slide the slider to zoom in and out as well as moving the red box to pan (move) to a different position on the page.
- Press Command **+** to zoom in and Command **-** to zoom out. You can use Command **Spacebar and click** with your mouse to zoom into a particular area. This is called "contextual zoom".
- Use the **scroll bars** or press **Spacebar** and drag with your mouse to pan.

Undo
To undo any action by choosing Edit>Undo or Command **Z**. (Note that you can't undo some actions such as scrolling that don't affect any items or the underlying document structure). **You can Undo several times.**

Setting up the Display Performance
If you are going to include graphics in a layout, it might be a good idea to begin with High Quality Display Performance.
- Click on the **InDesign** button at the right of the Apple button.
- Select **Preferences>Display Performance**.
- Set the **Default View** to **High Quality**.

Setting up a Master
Masters and Pages
Your Master (the basic background design for your pages)
A Master is like a background that you can quickly apply to many pages.
Objects on a Master appear on all pages with that Master applied.
Changes you make to a Master are automatically applied to associated pages.
**Masters commonly contain**:
- repeating logos and headings
- page numbers
- headers and footers

They can also contain empty text or graphic frames that function as placeholders on document pages. A master item cannot be selected on a document page unless the master item is overridden.

You can create as many Masters as you need. For example, if you require page numbers on some pages but not on others, you would create an **A Master** for the page with the no numbers, and a **B Master** for the pages with page numbers.

the Pages Palette

The Pages Palette (Window>Pages)
The Pages Palette contains all the information about your Master and Pages and can be visible at all times to help you navigate through your document. The top section of the palette contains icons for the Masters (A, B, C etc) and the bottom section contains icons for the separate "spreads" which are your document pages.
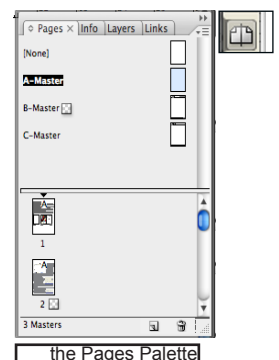
The A-Master - for Even Pages
- On the Pages Palette you can see that you automatically have an A-Master.
- Double click on the **A-Master** word to activate the A-Master on the screen for you to design.
- You can tell which page you are on by looking at the **Status Bar** (at the bottom left of your document). This should say "**A-Master**".
On this A-Master page we will create the necessary elements that may be repeated on more than one page.
You can see that the A-Master is consists of two facing pages.
- Make this one page by right clicking in the Pages Palette and selecting "**Master Options for A-Master**". Change the Number of Pages to **1**.
- Look at the first two pages you need to design **((1) on the following page)**.   The left page has a different

page number format to the right page. Page numbers will be common elements throughout most of the book so they belong on a Master Page.

Creating Text - a Text Frame for left page numbers
- Activate the **Type Tool** from the Tools Palette (or press the shortcut **T**).
- Click and drag the left mouse button to draw small **marquis** (i.e. a rectangle) near the top left of the left page. This will contain a page number.   We can adjust the size later if we need to.
- When you activated the Type Tool, your Options Bar changed to show the Text Options on the Options Bar at the top of the screen underneath the Menu Bar.
- On the **Options Bar**, change the font to **Calibri** and the size to **12 pt.**
- From the Menu Bar select **Type>Insert Special Character>Markers>Current Page Number.** An '**A**' appears showing you where the page number will appear.
- Press **ESC** to activate the **Selection Tool** and exit the Text Tool.
- Right click and select "**Text Frame Options**" (or select **Object>Text Frame Options**).
- Set the **Vertical Justification alignment** to "Centre" so that your text appears in the middle of the marquis box that you drew.
- Open the **Paragraph Panel** and press the 'Align Centre' button near the top left.
- Open the **Colour Palette**.
- Set the **Fill** colour to **black**.
- Click the **'T'** button on the **Colour Palette** and change the text colour to white.

Page 2   Page 3

Change size of Text Frame accurately
- With the **Text Box** selected, look on the Options Bar and readjust the **height** of the text box to exactly **0.7cm**.

The B-Master -for Odd Pages
Setting up a second Master for the right pages
- Open the **Pages Palette**, click on the small arrow at the top right of the palette and select **New Master**. This will automatically be named Master B but you can rename it if you wish.
- Double click on the **B-Master** words on the Pages Palette to start designing a layout for B-Master.
- From the Menu Bar select **Layout>Margins and Columns** and change the number of columns to 2.
- There are two lines in the middle where the **gutter** between the columns is automatically placed.
- From the Menu Bar select **View>Grids and Guides** and **untick 'Lock Column Guides'** so that we can move the columns.
- Using the Selection Tool click on the right side line of the gutter and drag it to **4cm**.
- Place the Page Number under the second column (**Type>Insert Special Character>Markers>Current Page Number**). You will see that a '**B**' appears showing you where the page number will appear

You can adjust the masters at any time and you will notice that any changes you make in a Master will automatically be applied to all the pages linked to that Master!

Applying Masters to Pages
- Drag the words A-Master to all even pages (i.e. pages on the left)
- Drag the words B-Master to all odd pages (i.e. pages on the right)

We will first design pages 2 & 3
Page 2
Activating a Page so that you can design your layout
- In the **Pages Palette**, double click on the **Page 2 icon** to display page 2 on the screen. You will notice that this page now has the A-Master has been applied to it.

- Import and arrange the appropriate graphic images from the Lecturer's folder for page 2 by following the instructions below.

Graphics - inserting drawings, images, photos, scans
There are four main ways to insert a graphic - the **Place** command is used most often, and it's the recommended way to import a graphic.

1. Importing a graphic using Place
- From the Menu Bar select **File>Place**. You will see the document menu from which you can select an image from a folder to place into your page.
- Click on the required file and click on **OPEN.** You should see your cursor change to a loaded graphics icon.
- **Click** with the loaded graphics icon 🖊 onto the page at the place where you want the upper left corner of the graphic to appear. Your file will be placed to the scale of the original.
- Be careful that you do not have any frame or image selected when you use File>Place. You will replace the existing image.

2. Importing a graphic using the Rectangle Frame Tool
- Select the **Rectangle Frame Tool** from the Tools Palette (the rectangle with an X, in the Tools Palette).
- Draw a **marquis** to position the image by clicking and dragging.
- From the Menu Bar select **File>Place** and locate the image from your folder. The file will be placed into the Placeholder Frame.

3. Copy and Paste
- In InDesign or another program, select the original graphic , and choose **Edit>Copy**.
- Switch to an InDesign document window, and choose **Edit>Paste**.

4. Drag and Drop a graphic
- Select the original graphic.
- **Drag** the graphic into an open InDesign document window.

Note: In Windows, if you try to drag an item from an application that does not support drag and drop, the pointer displays the ⊘ icon.

1

Placing and Fitting your Image
When you place or paste an object into a frame, it appears at the upper left corner of the frame by default. If the frame and its content are different sizes, you need to use the Fitting commands to achieve a perfect fit automatically.
To place your plan onto the first page,
- From the Menu Bar select **File>Place**.
- Select the correct **file** from the list.
- Your cursor has a small thumbnail of the image attached to it. **Click and drag** to place the image in the approximate position that you require.
- To access the Fitting command, **right click** on the image (or select Object>Fitting), select **Fitting** and scroll to "**Fit Content Proportionally**" to select it **(1)**.
- Right click again and select "**Fitting>Fit Frame to Content"**. If your frame does not cling to the image in the way that you want it to, you can click on the handles with the Selection Tool to move the frame edges **(2)**.
You can also use the Fitting Buttons at the top right of the Options Bar to fit your image appropriately.


2

Most of the time, you will need to use a combination of fitting commands to get the correct result for

your image.

Resizing an Image

- Select the image with the **Selection Tool**.
- Activate the **Scale Tool** (or press **S**).
- You will notice that handles appear around your image with a **Reference Point** in one of the corners.
- To resize proportionally, pull diagonally on the corner which is **opposite** the Reference Point corner. If you can't work out the reference point, there is a diagram at the **top left of the Options Bar (1)**, showing where the Reference Point is positioned.
- You can change the Reference Point by repositioning it on your image, or by using the diagram on the Options Bar.
- To resize horizontally or vertically at the same time, place the Reference Point at the centre and pull on the side handles.

Reference Point
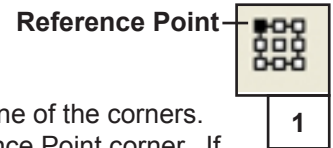
Views

- At the bottom of the Tools Palette there is the **Views Button (2)**. Click and hold to get the fly out menu and select **Preview** mode to see your document without guides, margin indicators and blue place holders.

Aligning Objects

- Open the **Align Palette** (**Window>Object and Layout>Align** or press **Shift F7**).
- Click on the objects you wish to align and select the Alignment Option from the Align Palette. For example, press the first icon to line up your sections at the left.
- **Note** that you can use the **Distribute Spacings** to distribute the vertical and horizontal spacing between objects. InDesign distributes the space between the top and bottom, or left and right objects.

Page 3
Importing Text from a File

- From the **Menu Bar** select **File>Place**.
- Choose the document called "**text1IndesignTutorial1.docx**"
- Your cursor becomes some text.
- Click and drag a text box into **Column 2**. The text from the file will appear. We need to adjust the layout of the text.
- Import the text file called "**text2IndesignTutorial1.docx**' and place it into Column 1.
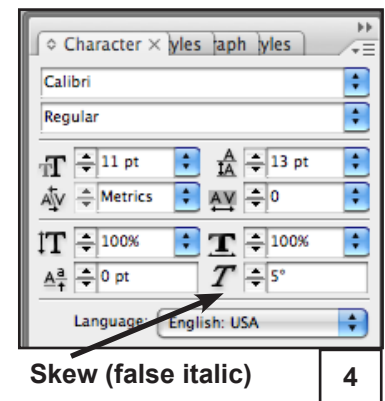
Manipulating Text
Dropped Capitals

- Select the **I** in the paragraph "I define beauty...".
- Change the font to **Times Roman** for this letter.
- Open the **Paragraph Palette**.
- Set the Drop Cap Number of Lines to 5 (3).
- Change the font of the **paragraph** to
- Change the **Skew** (false italic) to 5 degrees (4).
- Your paragraph should look like the one below.
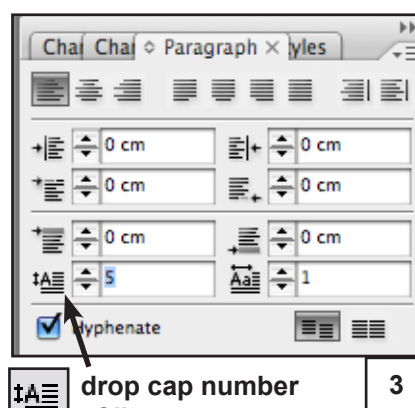
drop cap number of lines

Skew (false italic)

I define beauty to be a harmony of all the parts... fitted together with such proportion and connection, that nothing could be added, diminished or altered, but for the worse.
   - Leon Battista Alberti (1406-1472)

Calibri 11pt with **13pt leading**.

Inserting an Image
- Create a text box for the number **5**.
- Drag the text box onto the existing paragraph text.
- If the number 5 disappears, right click on the text box (or select **Object>Text Frame Options)** and select **Ignore Text Wrap**.
- On the **Options Bar** press the '**Wrap around bounding box**' button so that the text can be pushed to the right of the box. This is how you get text to 'flow' around an object. You can also select the **'Wrap around object shape'** button if your object is a group of objects, or you want more space between the object and the text.

wrap around bounding box   **wrap around object shape**

Notes to assist with your Layout

Hiding Frame Edges
Sometimes the number of blue frames can be distracting, particularly when several of them overlap.
- To see only active frames, from the Menu Bar select **View>Hide Frame Edges.**
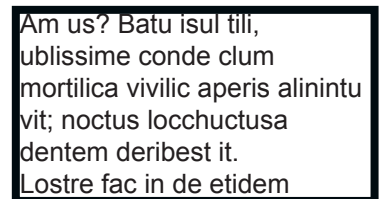
Drawing a Line
- Select the **Line Tool** and drag the cursor to draw a line. Press the Shift key for a horizontal or a vertical line.
- On the **Options Bar** set the **Line Weight** and the **Line Style**. The Colour of the line is dependent on the Stroke Colour.

Line Weight — 1 pt
Line Style —

Placeholder Text
- If you want to trial a batch of text while in the design phase, create a **Text Frame** by dragging a marquis with the Text Tool and from the Menu Bar select T**ype> Fill with Place-Holder Text** (see Right).

Am us? Batu isul tili, ublissime conde clum mortilica vivilic aperis alinintu vit; noctus locchuctusa dentem deribest it. Lostre fac in de etidem

Transparency
Unlike Photoshop, each object which can be selected can have its own transparency. To change the transparency of an object
- Select the object.
- Click on the **Transparency** setting on the Options bar and slide the slider until the required transparency is reached.
- Alternatively you can type in a transparency percentage.

100%
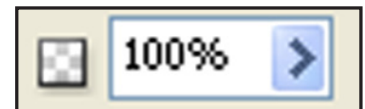
Layers Palette
Layers work in a similar way to Photoshop, except that each new layer is identified by a different colour.

When you do something on a layer, the borders of the text or image are the colour of the layer.

It is often an advantage to have certain experimental elements on different layers so that you can turn their visibility on and off (by clicking the "eye" at the left of the layer on the Layers Palette).

Layer 3
Layer 2
Layer 1

3 Layers
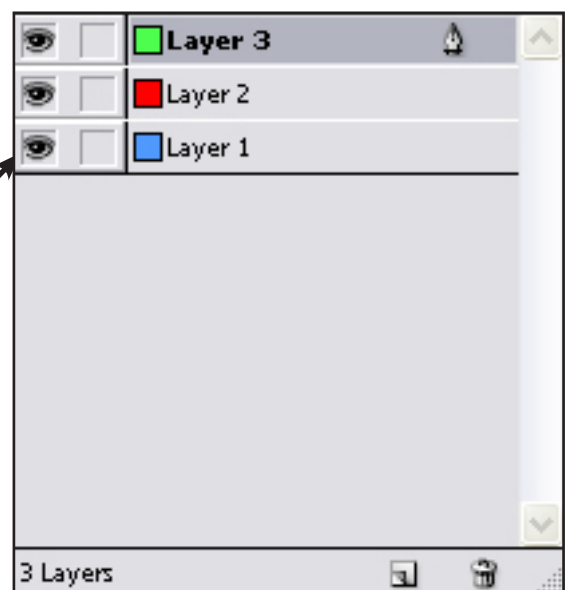
Links

When you place an image into your page it is automatically linked to your document. You can view all your linked images and files in the Links Palette. When you reopen an InDesign file with placed objects you will see the message at right. Always select 'Don't Fix' unless you are certain all the objects are in their correct state before you fix.
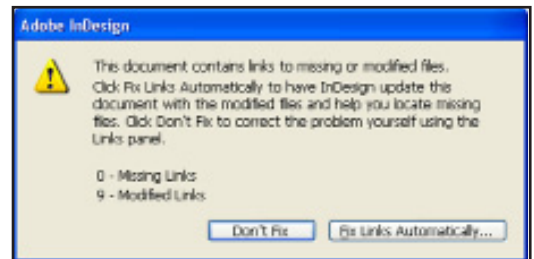
Links Palette
- A. Linked graphic file name
- B. Page containing linked graphic
- C. Embedded-link icon
- D. Modified-link icon
- E. Image from linked .indd file
- F. Missing-link icon
- G. Layer Visibility Override icon
- H. Adobe Stock Photos Comp icon
- I. Relink button
- J. Go To Link button
- K. Update Link button
- L. Edit Original button
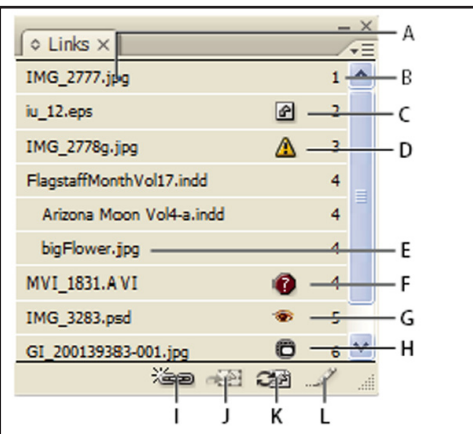
When you save your InDesign file it keeps a "snapshot" of the images you have placed, in the state that they were in at the time you placed them. When you reopen the InDesign file, if your linked file is not available or if it has been modified, a message will be displayed. If you choose not to fix the link, the image you placed will remain the same. If you choose to fix links automatically, InDesign will search for the image and replace it with a new version if you have modified it. You can use the Links Palette to manually relink if you wish. In any case, the image will remain in your document until you delete it.

Printing

If you print on an inkjet or laser printer the artwork will not print right to the edge of the sheet of paper, shown as the bounding box. Even if you have designed right to the edges of your page on the screen, there will always be a white margin where the machine grips the paper. This margin is often up to 10mm. If the design includes images or artwork up to the document edge, you will have to print on a larger piece of paper, and specify a larger page size for your printer.

Creating a PDF file
- From the Menu Bar select **File> Export> Adobe PDF**.
- Change the compatibility to **Acrobat 6 or 7.**
- Click Spreads if you have facing pages.