

Getting Started with InDesign

Adobe InDesign is a very powerful publishing application. In fact, many of the books, magazines, pamphlets, brochures, PDF files, and fliers you read every day were created and published using InDesign. InDesign is part of the Adobe Creative Suite 3 suite of applications that include Acrobat, Photoshop, Dreamweaver, Flash, Illustrator, and more. If you don't have access to these applications, you can download a trial version from the Adobe website...

Link: <http://www.adobe.com/products/InDesign/?promoid=BPDEI>

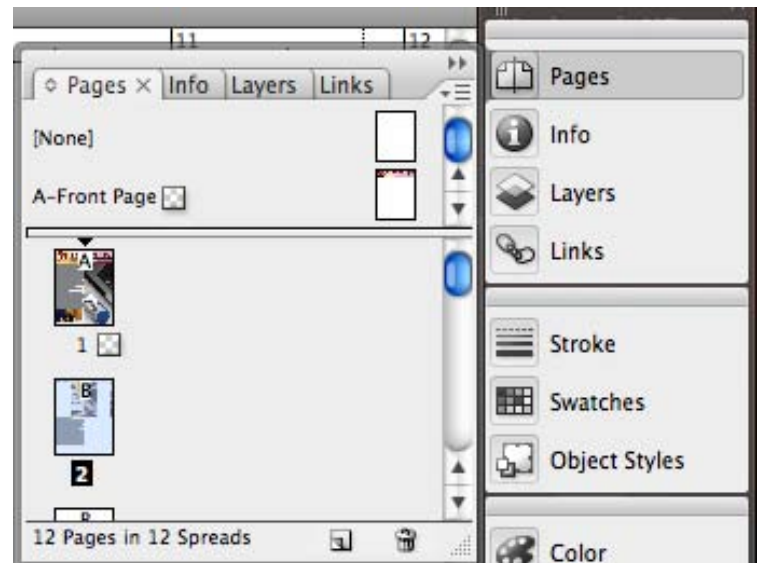
Also, you'll find links to video tutorials, a tour of the product, other downloads related to InDesign there.

When you open InDesign, you'll see a layout similar to that in the illustration above. At the left is the toolbar. As you select a tool by clicking on it, an options bar for that tool appears just under the menus at the top of the screen. Above, I have the selection tool selected, and you see the common tasks and options I can do with that tool in the options bar at the top of the screen.

On the right side of the screen, you see InDesign's palettes (collapsed so they take up little screen real estate). Clicking on any palette will expand it. For example, in the illustration to the right, I've clicked on the Pages palette. It expanded to show me the pages in my document, which has twelve pages. Double click any of the page thumbnails to go to that page. Drag a page to the trash icon at the bottom of the palette to delete it. Add a new page after the currently selected page in the palette by clicking on the 'Create

New Page' icon. Duplicate a page by dragging its thumbnail icon on top of the 'Create New Page' icon. (That's the icon of a page with its corner turned up.) Above the page thumbnails there's a dividing line, above which you'll see the master page icons. Remember this, we'll be talking about master pages later on.

In the center of the screen, you see the work area, or pasteboard. The Pasteboard includes your page layout, plus room around the outside to store objects that you may want to add onto the page later. It is an intuitive, clean layout that corresponds closely to the layout of other Adobe applications.



Preliminary Preparations Before Beginning an InDesign Project.

When you start any InDesign project, you should first create a new folder on your hard drive and give it a name. All resources you are going to include in your InDesign document should be saved to this folder, including any graphics and multimedia files. This should be done before you actually insert any of these into your InDesign project. Here's why...

In order to save room in the InDesign file itself, InDesign creates a 'preview' of any graphic or multimedia file you place in the document - a low resolution placeholder instead of the real graphic. Imagine, if you will, that you have a 24 page document with a photo on each page. High resolution color photos typically are 20 megabytes in size (or higher!). With 24 such photos, your InDesign document would end up being a huge, unwieldy file if it saved these photos as part of the file itself. To get around this, and make InDesign more responsive to work with, low resolution previews are placed instead. This allows you to visually view the layout you're creating, but at the same time keeps things from bogging down in bloat.

When you actually create your new InDesign file for your project, that file should be saved into the folder you've created as well. Then if you have to move your project (say, to another computer), you just move the entire folder and its contents. You'll also want to make sure that other computer has the same fonts installed that you used in your project. If you're missing anything, InDesign will tell you. The Links palette will help you reconnect things if you need to.

Create a New File in InDesign

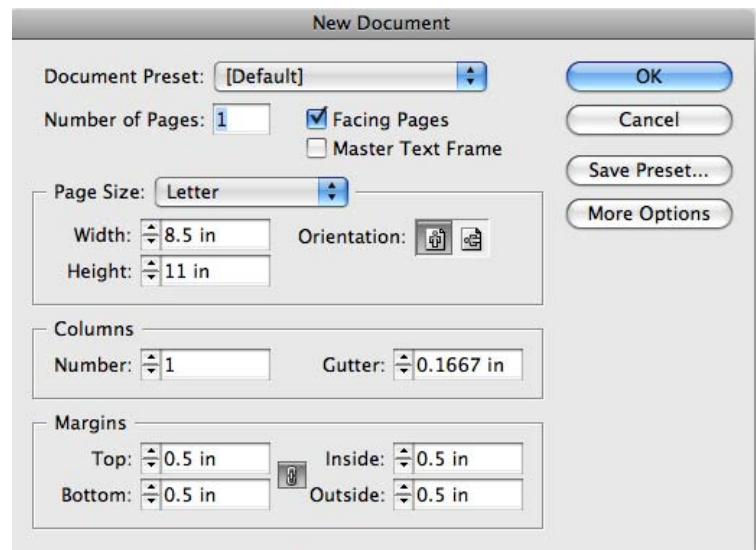
By default, InDesign uses points or picas to measure things on a page. These are common measurement systems for printers and publishers - but confusing to most of us who are used to the good old English measurement system of inches. A pica is a typesetting unit of measurement commonly used for measuring lines of type. One pica equals 12 points. There are 6 picas to an inch. Also used to describe a typewriter type that prints 10 characters per inch (cpi). It takes 72 points to make an inch. You've worked with points before - every time you change a font size. Fonts are measured in points.

You usually change the measurement system by going into the preferences - units and increments - and change it to inches. You can also right-click on the ruler in InDesign and choose inches to display on the ruler.

"What you may not know is that you can also change the global measurement system on the fly without ever going into the Units & Increments pane of Preferences.

It's a keyboard shortcut—four-fingered, true, but still typically faster than the Preferences route. On Mac, press CMD+OPT+SHIFT+U, and on Windows, CTRL+ALT+SHIFT+U, to cycle through the available measurement systems, in the order of the Units & Increments Ruler Units menus—Points, Picas, Inches, Inches Decimal, Millimeters, Centimeters, Ciceros, and Custom (measured in points). Each press of the keyboard shortcut will change both the horizontal and vertical rulers, as well as reflect in the applicable fields on the

Transform, Control, and other palettes." (<http://www.InDesignsecrets.com/>)



[change-measurement-systems-on-the-fly.php](#))

So after you've changed the measurement system to your particular preference, click the File - New - Document menu, and you'll see the following dialog...

Here, you can specify the number of pages. If you're creating a book with facing pages that need extra room at one edge for binding purposes, you'll want to make sure the facing pages option is checked. That way, you'll end up with 2-page spreads. You can choose the margin sizes, number of columns, and paper size as well. Once you click OK, you'll be looking at a similar screen layout that I showed you on the previous page. Let's jump in and create our project...

Moving from page to page in InDesign

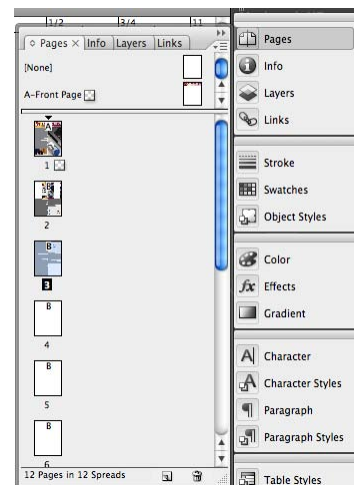
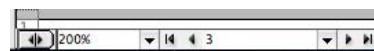
Since InDesign is a publishing application, it's quite different from using a word processor. If you've created a 12 page document, for example, you can move from page to page in a number of ways...

Of course, the most obvious way is to use the scroll bars. You'll see each page and its pasteboard area.

The next way is to use the Pages palette. You can double-click any page's thumbnail icon to go to that page in the document. Also, you can re-order pages by dragging them up or down the list.

This is also where you can view the master pages (at the top of the dialog - usually begins with A-name or B-name, etc.). You put items you want to appear on every page on the master page, like page numbering.

You can also use the page controls at the bottom of the screen to move to any page. (See illustrations at right and below.)

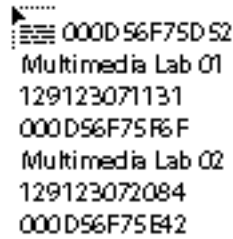




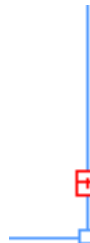
Working with Text in InDesign

There are two ways to enter text into InDesign. One way is to type your document into your favorite word processing program. Then you place the file into InDesign using the Place command (in the FILE menu). InDesign generally imports all formatting information specified in the word-processing application, except information for word-processing features not available in InDesign.

When you place a text document into InDesign, the cursor changes to a "place" cursor. The cursor looks like the one to the right. You'll also see a little of the text you are placing (or picture, if it is a graphic). Because you can place more than one file at a time in InDesign CS3, this becomes very handy - you can see which document you're placing. To place a document, you click in the upper left corner of the area in the document where you want to place the file, then drag to the lower right corner.



If there is more text than can fit in the frame you've created, you'll see a red plus in the lower right portion of the frame. To place the remainder of the text somewhere else, get your selection tool (the shortcut is the escape key), click on the red plus, and your cursor changes into a place cursor again. Move to another section of your document, click and drag another text frame, and your text will continue in this frame. You keep doing this procedure until all your text is visible.



This kind of procedure results in a threaded story. When you decide to change the shape or size of any of these text frames, the story will re-flow to fit the new area. If any of your text cannot fit into the re-sized frames, then you'll see the red plus sign again.

The other way you can enter text into InDesign is to type it directly in InDesign. Grab your text tool and click and drag a text frame with it in your document. The options bar at the top will change so you can see your font and size fields, and more ways to change and control your text than you ever had in your word processor. You can see that option bar at the top of this page. You can also use the Character palette in your palette area to control many of the font and type settings. (See the Character palette to the right)

There's much more about working with text in InDesign that we can't cover in this short article. Here are some other resources you may find helpful.

Link: <http://www.layersmagazine.com/category/in-design/>

Link: http://www.adobe.com/designcenter/video_workshop/

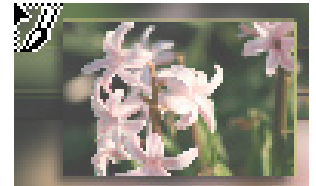
Link: <http://indesignsecrets.com/>

Link: http://www.pixel2life.com/tutorials/adobe_in-design/

Adding Graphics into Your InDesign Document

One great thing about working with the Adobe CS3 suite of applications is they work very well together. I use Bridge to view and scan through my document files, graphics, etc. You can open a graphic in Photoshop CS3 and manipulate it the way you want, then save and open it within InDesign. In InDesign, you can right-click on a graphic and choose 'Edit Original,' work with it in Photoshop, save the changes, jump back into InDesign, and the changes will be showing there.

You place a graphic the same way you place text. You go to the FILE menu and choose the Place command. Select the image you want to place, and the cursor will change to the place cursor with a preview of your graphic showing. Click and drag a frame, just like you did with text.

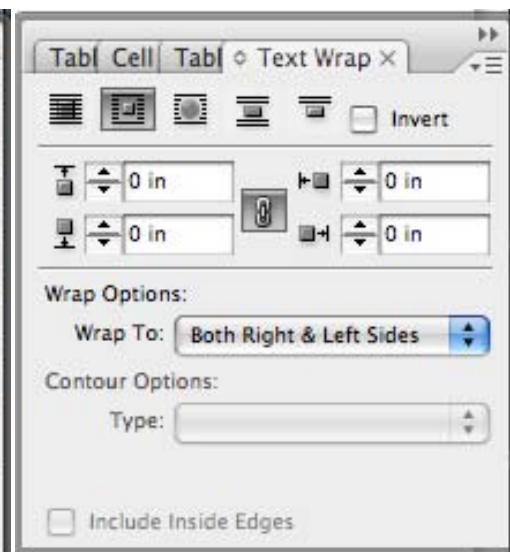
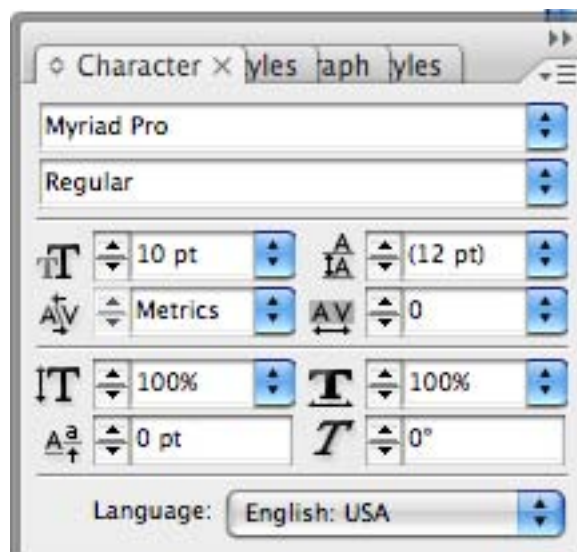


Depending on the size of your graphic you're placing, you may not see all of the image in the frame you've created. With the selection tool, you can click on the frame to see the re-size handles. With the blue frame handles you can stretch or shrink the frame to see more (or less) of your image. This re-sizes the frame only, not the graphic.

To re-size the graphic itself keep clicking the frame again with the selection tool until it turns brown. Or you can grab the Direct Selection tool (the white arrow tool) and click on the frame. Now you can re-size the image rather than the frame.

Between these two tools, you can work with the size, cropping, and shape of both the frame and the image that has been placed within it.

To make your text wrap around your image, go to the Window menu and choose 'Text Wrap.' If you've used text wrap in Microsoft Word or other programs, this window will look familiar to you. You can choose how your text will wrap around your graphic, as well as the spacing you want to separate your graphic from your text. You have some options as well. I use the text wrap window so much that I've dragged its window into my palette area so its always easily opened.



Using InDesign Master Pages

When you first create a new document, a default master page, called the A-Master, appears in the top section of the Pages palette. You can use this as your first master page, but you can also create as many master pages as you want in InDesign. A master page is used to place graphics and text that are common to more than one page in your document. For example, the color bar at the top and bottom of the UCET newsletters, and the page numbering are elements I've placed on the A-Master in this document. Other common master page elements would be company logos, colored side bars, dividing bars, etc. Remember, this is where you put something that you want to appear on many pages, so a master can save you lots of time!

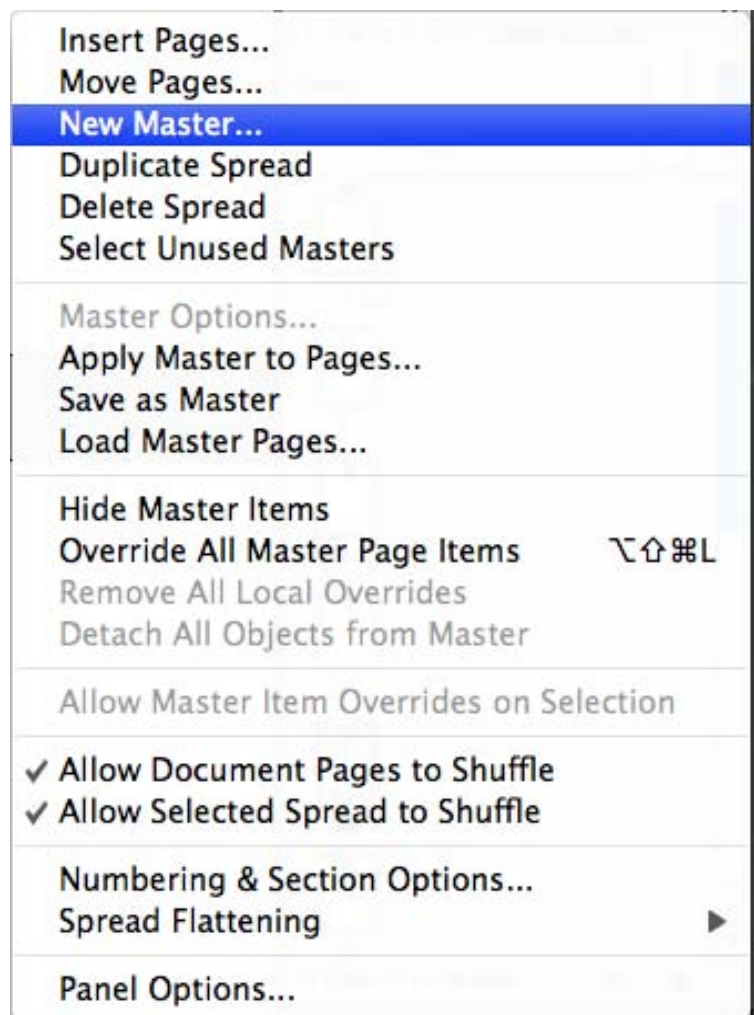
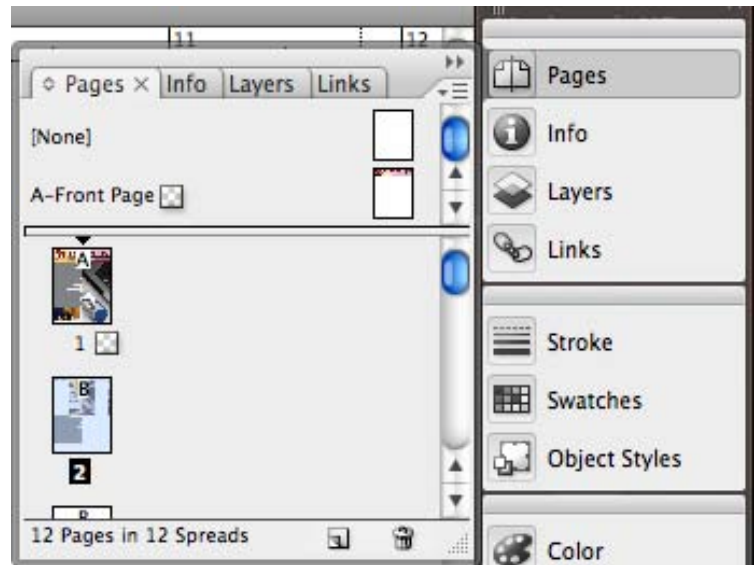
To get to the master pages, or to create more of your own, go to the Pages palette in your palette bar. Double click on the A-Master (which I renamed A-Front Page in the illustration at right.) Then place text and graphics just as I described how on the previous page.

To create a new master, click on the small single triangle in the master page section of the Pages palette. You'll see the drop down menu at the right. Choose 'New Master...' and follow the dialog box that will continue through the process. Here you can also associate pages to a particular master page you've created ('Apply Master to Pages...'), and you can load a master page from another document you've created.

To automatically number pages from a master page, get your text tool and create a text frame, then go to the Type menu, Insert Special Character, Markers, and choose 'Current Page Number.' Size and place this text frame on your master where you wish the page numbers to appear. If you already have more than one master, you'll want to copy this text frame and place it in the same position on your other masters as well.

One nice thing about master pages in InDesign - you can create a new master page based upon one you've already created. When you're in a master page, the 'Duplicate Spread' option you see in the menu at right becomes 'Duplicate Master Spread "A-Master"' which will give you an exact copy of your master page, named 'B-Master'. You can then change elements on that master page and associate pages with it.

Master pages are a very powerful and time saving feature of InDesign. If you do a daily, weekly, or monthly publication - and want to keep the same look and feel each time, you develop a document with all your text styles, master pages, and layouts, and save them as a template rather than a regular InDesign document. That way, when you double click on a template file, InDesign will open a copy of your template, so you never end up writing to your template file.



Creating a Table in InDesign

Tables are important to any text and layout application. They are an easy way to communicate information quickly, and are often used to summarize large amounts of data into an easily read format. Tables consist of rectangles (called cells) laid out in rows and columns.

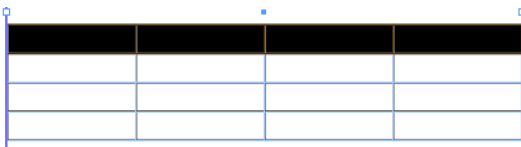
InDesign regards tables as text, so they can only be created within a text frame. And you'll need the text tool to edit a table.

To create a table, you must first create a text frame. Grab your text tool and click and drag a text frame on your document. Then you can go to the table menu and select 'Insert Table...'

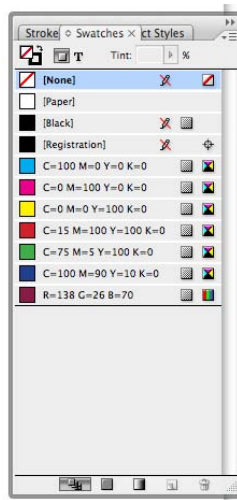
In the dialog that appears (see illustration at right), you can choose how many rows and columns you desire. You can also select how many header and footer rows you want. A header row will appear at the top of the table, and if the table takes up more than one page - will appear at the top of the table on each page. Of course, a footer row is the same, only at the bottom row of a table.

Once your table has been created, the 'Table' menu will allow you to control almost every aspect of your table, including the ability to merge cells together, or to unmerge them. You can split cells either vertically or horizontally. There's a lot more you can do as well. Explore the table menu options.

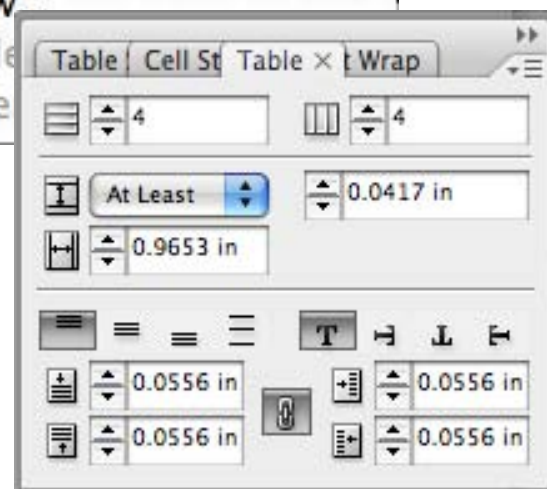
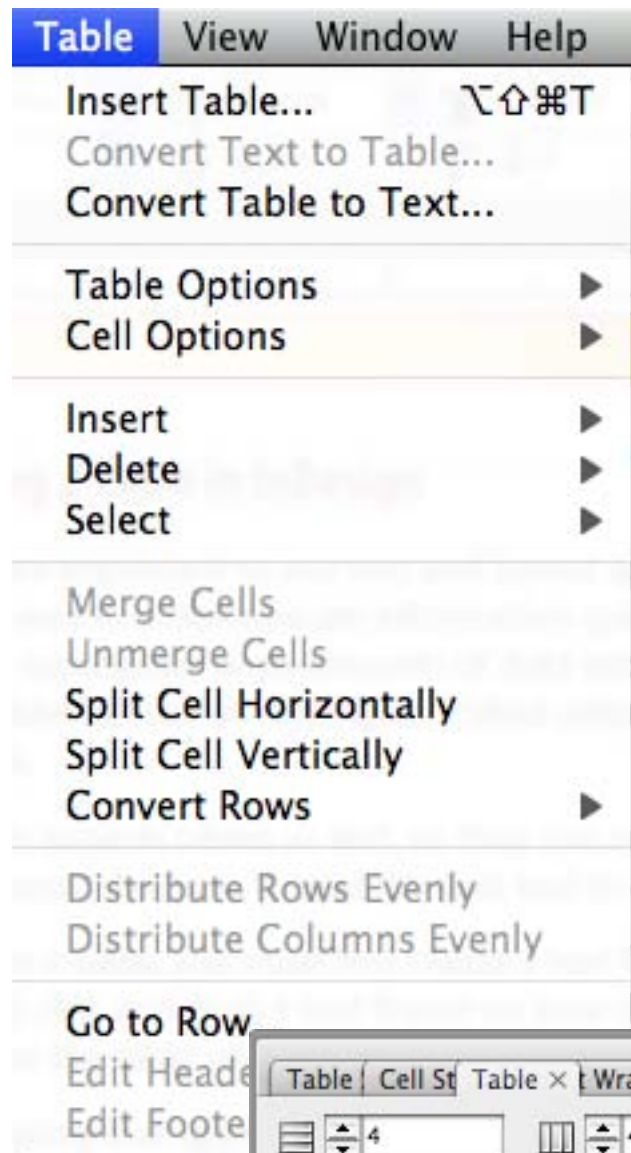
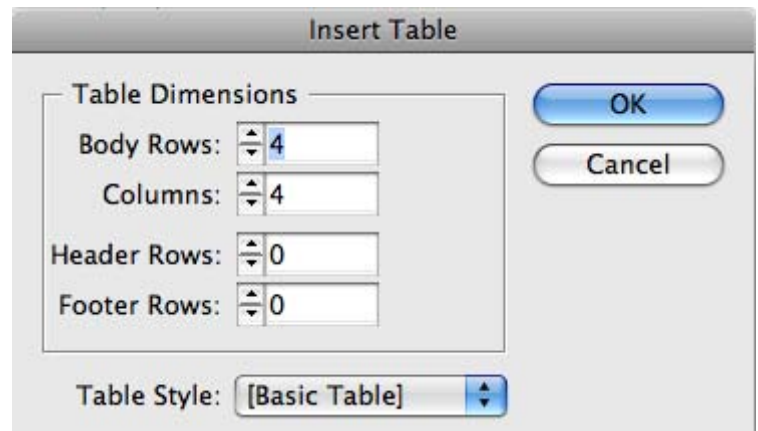
Adding color to a table always can put some pizzazz into a document. You use the text tool to select cells, rows, or columns of your table.



Then go to the swatches palette to add a fill color or apply a stroke color. In the upper left corner of the 'Swatches' palette, you'll see the stroke and fill icon. The stroke icon is on the bottom right, the fill icon is in the upper left in this illustration. You can switch them by clicking the corner arrow. Whichever icon is on top will be the active choice. If you want to fill the cells with color, make sure the fill icon is on top, then pick a color swatch from the list. If the color you want is not in the list, create a new swatch by clicking the single triangle in the upper right corner of the palette, and choose 'New Color Swatch.' To color the lines of the table, switch to the stroke icon and follow the same procedure.



By the way, this is how you can color or put a stroke on any frame you've created in InDesign, including text and graphics frames. This is how you'd create a colored side bar box as well. If you create a shape with the Rectangle tool, ellipse tool, or shape tool - this is how you'd color the fill and stroke on these as well. You'll notice that there is a 'Stroke' palette as well, which will let you choose the thickness and style of a stroke. There is also a 'Table' palette which provides a quick click to many options you'll find in the Table menu.



A Typical Workflow for an InDesign Document...

It always helps to know the process for creating an InDesign document. Here the workflow I use...

- 1) Create and name a folder for my InDesign project on my computer's hard drive.
- 2) Create or gather all the text files (such as Word documents, Excel files, PDF documents, etc.) and graphics I plan on using in my InDesign document.
- 3) Create a blank InDesign document and save it to my folder.
- 4) Use the frame tool and create my layout for my document, including any master page layout items.
- 5) Place (File-Place command) the text and graphics into the document where I want them to be. One of the great new features of InDesign CS3 is that you can select many documents or graphics to place at one time. In the browse dialog that comes up when you issue a place command, you can select more than one file by using the shift key or the control key (command key on a Mac). As you place files into frames in your document, you'll see a preview of your file at the cursor.
- 6) Clean up (perfection counts!), spell check, and otherwise double check that everything is working the way you want it to. Be sure to save your file often. Sometimes it's helpful to save versions of your file as you go along.
- 7) Publish or print your file. More about this...

Publishing Your InDesign Document

If you're going to print your document, it's as easy as File-Print in the menu. Most print shops have InDesign, so if you're printing things professionally, you can send your InDesign file to them to print. Be sure to ask your publisher.

You can go to the File menu and do 'Export'. Here you can export your InDesign file as a PDF file, JPG image, EPS file, and more. This is how I publish the UCET newsletter each month.

Conclusion

InDesign is a powerful desktop publishing program. However, there are many others as well. You'll find many similarities between the various desktop publishing programs, so if you learn how to do one, it will be easier to learn others.

Some desktop publishing programs are freeware. One example is PagePlus SE from Serif. PagePlus SE is a one way to get into desktop publishing and easily design professional-looking documents for every occasion.

Link: <http://www.freeserifsoftware.com/>

Link: http://www.download.com/PagePlus-SE/3000-6675_4-10409484.html?cdlPid=10409485

If you've not used desktop publishing software before, you'll be amazed at the freedom you have to easily arrange and place graphics, text, hyperlinks, and multimedia into a document. You'll start to wonder why you ever use that word processing program. Now, all I need is a computer that's smart enough to write it all for me! Or at least, let me tell it what to write....

