InDesign Setup

New Document

Width: 4 in
Units: Inches
Height: 6 in
Orientation

PAGE DIMENSIONS

Width and Height: the size of one page. Even if Facing Pages is on, this still means just one page, not the whole spread.

UNITS

The other ways to switch units, besides here when starting a new document, are:

- Right-clicking on the rulers at the edges of the InDesign window (⌘**R** = show rulers)
- InDesign>Preferences>Units & Increments

Pages: 1
Facing Pages
Start#: 1
Primary Text Frame

FACING PAGES

☐ **Off:** single pages — 1, 2, 3, 4

☑ **On:** 2-page spreads — 1 | 2 3 | 4 5 | 6

PRIMARY TEXT FRAME

A continuous text frame on all the pages that fits the margin + column settings

START #

Will the first page start with a different number than 1? *Warning: changing this can complicate printing folding books*

Columns: 3
Column Gutter: 0.25 in

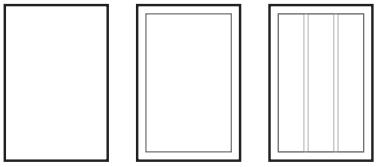
Margins
Top: 0.5 in
Bottom: 0.5 in
Left: 0.5 in
Right: 0.5 in

COLUMNS AND MARGINS

These are guidelines to help with the layout, and they do not print.

They can be changed later by going to **Layout > Margins and Columns...**

Columns are always vertical. Horizontal rows can be added with **Layout > Create Guides**



Empty page with no grid or guides

Margin: the border between the main content + page edge

Columns: The page is divided vertically

Gutter: The space between columns or rows

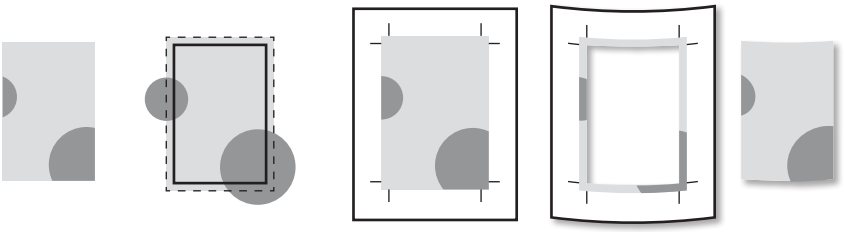
Bleed and Slug

Bleed
Top: 0.125 in
Bottom: 0.125 in
Left: 0.125 in
Right: 0.125 in

Slug
Top: 0 in
Bottom: 0 in
Left: 0 in
Right: 0 in

BLEED is printing a little extra beyond the edge of your page, so that it can be trimmed off. Any part of your design that touches an outer page edge needs to extend to the bleed line (the red line outside the InDesign pages)

SLUG is an area outside the page that can contain extra printing information, for example registration marks, fold marks, or instructions



Original Design

File with bleed Background color and the artwork touching the page edge also reach the bleed line.

Printed and ready to trim The paper it's printed on needs to fit the artwork, + the bleed, + room for trim marks.

Trimmed and finished The bleed is visible on the paper scraps.

Bleed is used to make sure there aren't slivers of white paper visible on the edges, and allows room for error making the cut.

InDesign Pages

PARENT PAGES

Everything on a parent page will appear on the document pages it's applied to. In this example, pages 1–4 have **A-Parent** applied, and pages 5-6 have **B-Parent.**

Margins, columns, and other guides can be set up on parent pages.

Drag a parent page onto a regular page to apply it. Parent page artwork will be locked, and can be unlocked on either by ⌘-shift-clicking it, or with **Object > Unlock All On Spread**

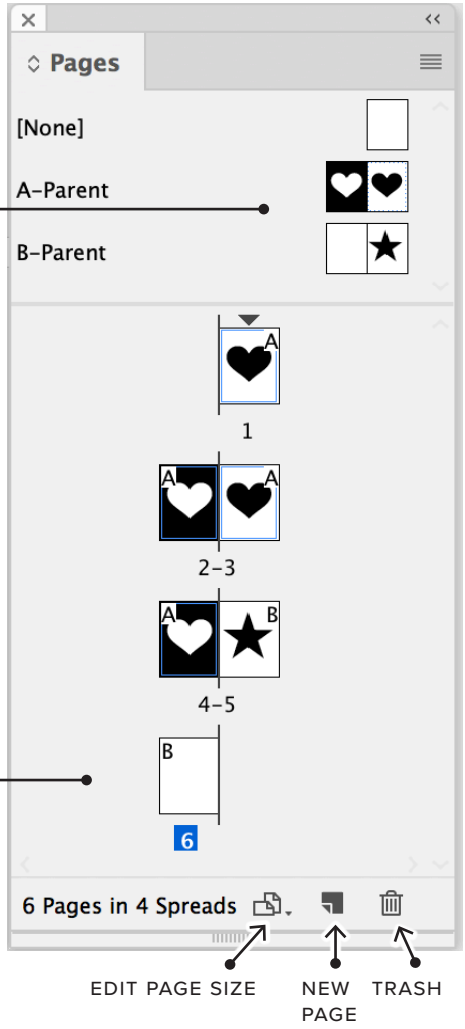
REGULAR DOCUMENT PAGES

- Click on pages to select them *(shift-click to select multiple continuous pages, and ⌘-click for non-continuous pages)*
- Double click a page to go to it
- Drag pages to change the order
- Drag pages to the trash to delete
- Drag pages onto the New Page icon to duplicate them

If Facing Pages is on, the first page and the last page on the left side will appear alone. If you print a folding booklet, they will print next to each other as the front/back covers.

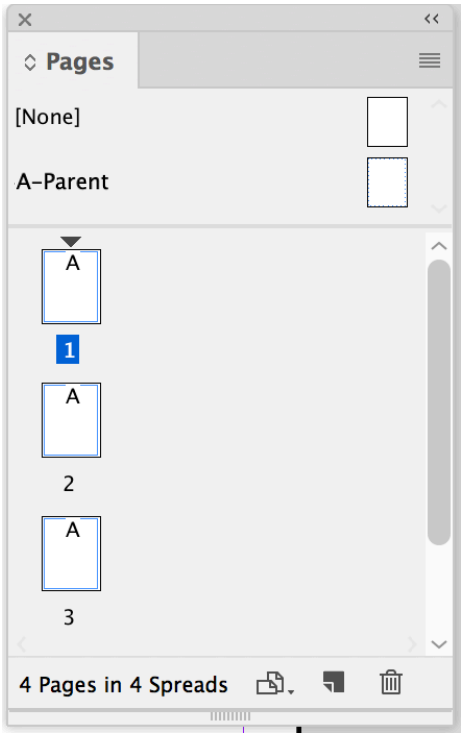
DOCUMENT SETUP: FACING PAGES ON

2-page spreads with center spine



DOCUMENT SETUP: FACING PAGES OFF

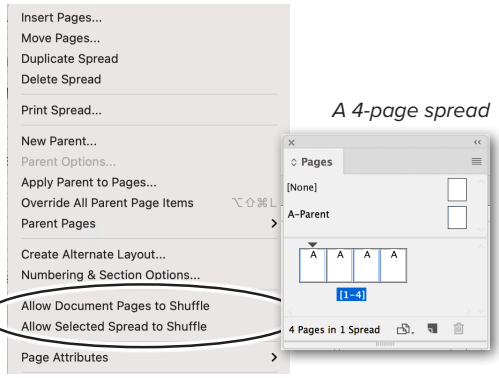
Separate, single pages



SPREADS OF MORE THAN 2

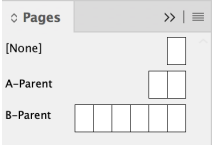
You might need a spread of more than 2 pages for a folding design. One method is to start with single pages, not facing pages.

Open the menu at the top right corner of Pages, and turn OFF "Allow Document Pages To Shuffle." Then drag the pages next to each other until you see a square bracket shape like]



A 4-page spread

Another way to get spreads like this is to choose New Parent... and set the number of pages higher than 2.



AUTOMATIC PAGE NUMBERING

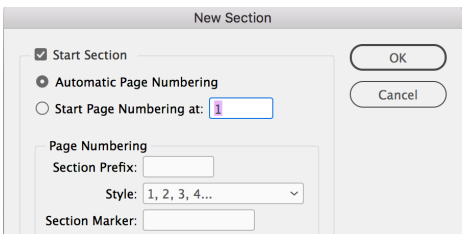
Make a text box on a parent page. Then, go to:

Type > Insert Special Character > Markers > Current Page Number

The special "Current Page Number" character will appear on the parent page as the parent prefix (like **A** or **B**), and appear on each document page as the page number. It uses the same page numbers that you see in the Pages window, and it's also possible to change the number style (for example, to roman numerals) and starting number by going to "Numbering & Section Options" in the Pages side menu.

NUMBERING & SECTION OPTIONS

A default new document starts out with only one "section", starting with a page numbered **1**. The triangle above Page 1 in the Pages window is a section marker. In the Pages side menu, **"Numbering & Section Options..."** lets you split the document into multiple sections, and customize the numbering.



InDesign Images

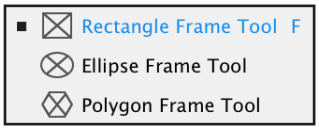
Place Images

File > Place
or
Drag image file directly from Finder window

EVERY IMAGE HAS A FRAME

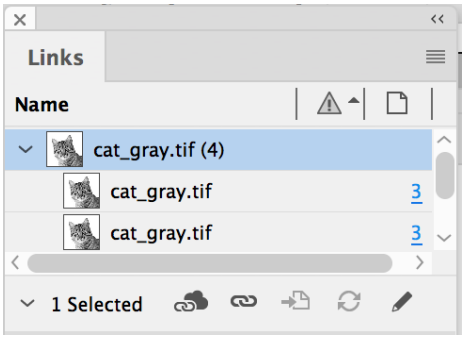
You can draw a frame first using the frame tools, or any other tools that can make a closed vector shape, and then drag or place images into that frame.

If you don't make a new frame first, images will automatically have a simple rectangle frame, the same size as the image.



Window > Links

This panel shows a list of every placed image in the document. It shows how many copies of each, which pages they're on, and image information like colour mode and resolution.



These images are linked to the original files on the computer, and won't come along with the .indd file to another computer unless you either:

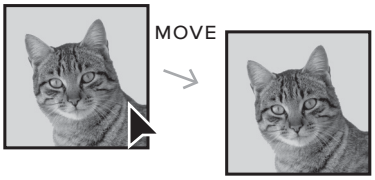
Embed them (in the Links panel side menu) to attach them to the InDesign file

Use File > Package to collect everything together in a folder, instead of just saving the .indd file

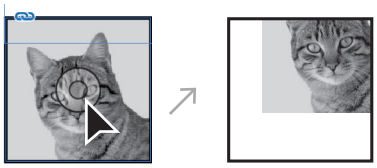
Moving and sizing images

The content and the frame are two different parts. Frames can have fill and stroke colours in addition to containing placed image content.

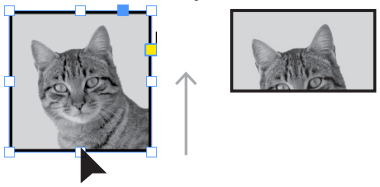
Black Arrow (Selection Tool):
Drag to move the frame and the content around together



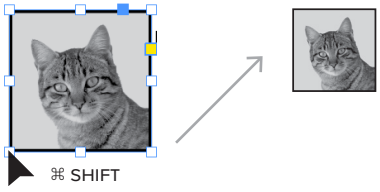
Drag the circle that appears in the center of the frame to move the content around inside the frame



Drag the bounding box handles to crop or extend the frame. The content inside stays the same.



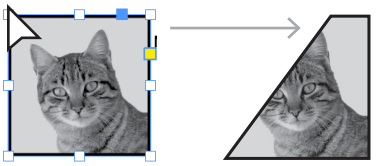
Drag the bounding box handles while holding command ⌘ and shift to size the content/frame together.



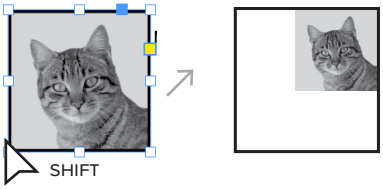
White Arrow (Direct Selection Tool):
Drag to move the content around inside the frame



Move individual points to change the frame shape. The pen tools for adding/deleting points work too.



Drag the bounding box handles while holding shift to resize the content. The frame stays the same.



AUTOMATIC FITTING

Select an image, and go to **Object > Fitting**, or right-click (control click on a Mac keyboard with no mouse) and choose Fitting from the menu.



Fill frame proportionally

The whole frame is filled, no matter how much of the original image is cropped



Fit content proportionally

The whole original image is visible, no matter how much of the frame is empty

Useful InDesign Features For Text

Glyphs Panel

Type > Glyphs
Lets you see every character in the font that's selected – just double click to add to a text box. This is also in Illustrator.

Great for quickly finding punctuation and symbols, fractions, letters from different language alphabets than your keyboard, alternate versions of characters, or specific dingbats and ornaments. Some fonts have unusual surprises in their full set of glyphs!

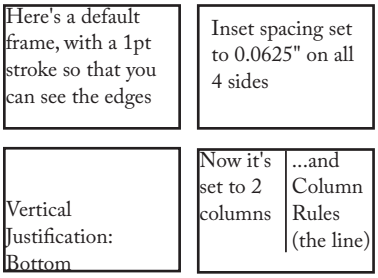
Show Hidden Characters

Type > Show Hidden Characters
Lets you see the invisible characters for spaces, line breaks, and more.

¶ Paragraph break (return)
affects paragraph styles
¬ Line break (shift-return)
doesn't affect paragraph styles
» Tab
• Space
End of text

Text Frame Options

Object > Text Frame Options
Here are some settings that apply per frame, rather than to selected paragraphs or characters. Note: this is under the Object menu, not Type, and these are many of the same options available for table cells.



Paragraph Styles + Character Styles

Window > Styles > Paragraph Styles

Window > Styles > Character Styles

Working on a large project is a lot easier if you use these panels to save and reuse text styles. For example: if you need to change the font for every heading in a 100 page book, this is a way to make that change *once*, instead of hundreds of times.

IN BOTH PARAGRAPH AND CHARACTER STYLES

Basic Character Formats
- Font family, style, and point size
- Leading, kerning, and tracking
- Case and position

Advanced Character Formats
- Horizontal/vertical scale, skew *(distorts the type + usually shouldn't be used)*
- Language options

Character Color
- Apply color swatches to text fill/outline

OpenType Features
- Choices about whether to automatically use special characters for ligatures, alternates, fractions, etc
- Figure style

1 2 3 4 5 6 7 8 9 0	1 2 3 4 5 6 7 8 9 0
TABULAR LINING	PROPORTIONAL LINING
1 2 3 4 5 6 7 8 9 0	1 2 3 4 5 6 7 8 9 0
TABULAR OLDSTYLE	PROPORTIONAL OLDSTYLE

Underline Options/~~Strikethrough Options~~
- Line weight and color
- Type: solid, dashed, dotted, etc
- Offset: shift position up or down

Export Tagging
- InDesign can export to HTML/CSS and EPUB, which use tags to organize the structure and style of the document (for example: <h1> is the HTML tag for a top level heading, and <p> is a regular paragraph.) It does some of this automatically, but you can also customize which styles correspond to each tag.
- Paragraph styles can also become tags for PDFs.
- Well-organized tags improve accessibility for devices like screen readers

ONLY IN PARAGRAPH STYLES

Indents and Spacing
- Alignment (left, center, right, justify)
- Paragraph indents
- Space Before / Space After
- Baseline grid alignment

Tabs
- Set positions for tabs

Paragraph Rules
- A line above or below the paragraph
- Options: line weight, line type, colour, positioning (offset, indent)

Paragraph Border
- A line around the paragraph
- Options: line weight, line type, colour, corners, positioning (offset, edges)

Paragraph Shading
- A solid fill behind the paragraph
- Options: Colour, corners, positioning (offset, edges)

Keep Options
- For handling widows and orphans
- Forces lines of text to stay together and not split across pages/frames

Hyphenation
- Control whether hyphens are allowed
- Set the rules for how hyphenated words are split up and balanced

Justification
- Adjust the allowable range of word and letter spacing for justified text

Span Columns
- Lines of text can split into columns, or span across multiple columns

Drop Caps and Nested Styles
- Specify formatting for the first character in a paragraph, or a custom range of text within a paragraph or line.

GREP Style
- Customize & replace text using a system of codes and patterns

Bullets and Numbering
- Options for bulleted and numbered lists

InDesign Table Reference

Creating a Table

Tables are contained in a text frame.
There are a few ways to make a new table:

A. With the Type Tool cursor (T)in a text frame, go to **Table > Insert Table** in the menu. It does not need to be an empty frame – a table can be included in the same frame before or after other text.
OR

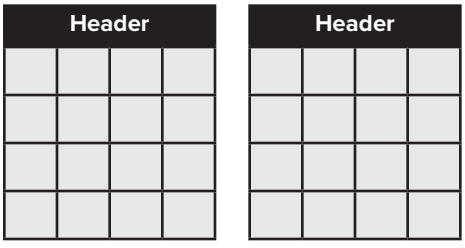
B. If the type cursor is not in a text frame, the **Table** menu will have **Create Table** instead of **Insert Table**. The new table will be "loaded" on the cursor, and you can click to place it on the page, similar to placing image files.
OR

C. If you already have text content for the table: paste or place it into InDesign, select/highlight it with the Type Tool, and choose **Table > Convert Text to Table** in the menu. The formatting of the original text matters, and InDesign can only automatically arrange it into rows + columns based on commas, tabs, or paragraph breaks.

If the content is from a spreadsheet like Excel, Google Sheets, or Numbers, and you're having trouble bringing it correctly into an InDesign table (either pasting into a blank table, or using Convert Text To Table): try saving/exporting it from the original sheet as "comma separated" (.csv) or "tab separated" (.tsv)

Header + Footer Rows

Header (top) and footer (bottom) rows can either be set when a new table is created, or made from existing rows with **Table > Convert Rows.** If a table spans multiple pages or multiple text frames, the header/ footer will automatically appear at the top/ bottom of each.



ABOVE: this is all one table with one header row set up, continuing across 2 text frames.

Table Vocabulary

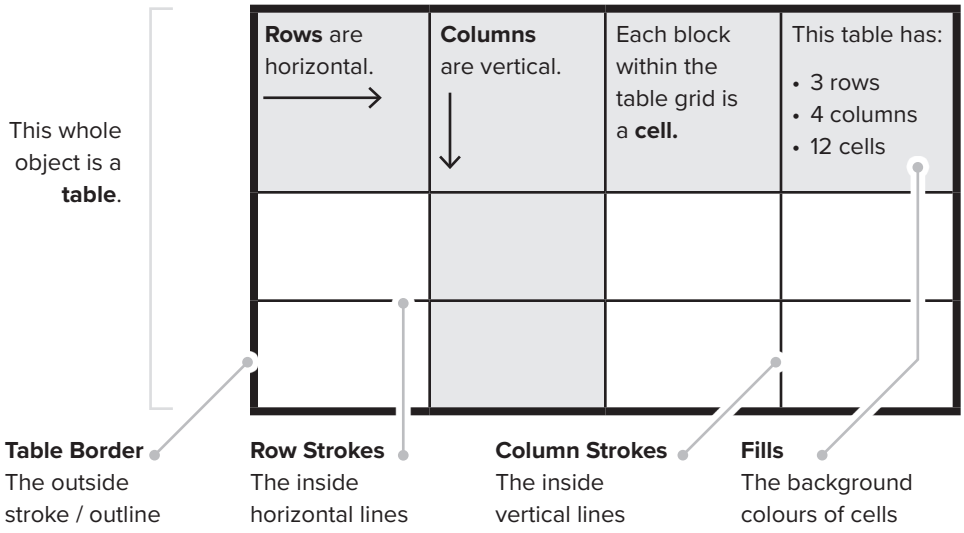


Table Menu

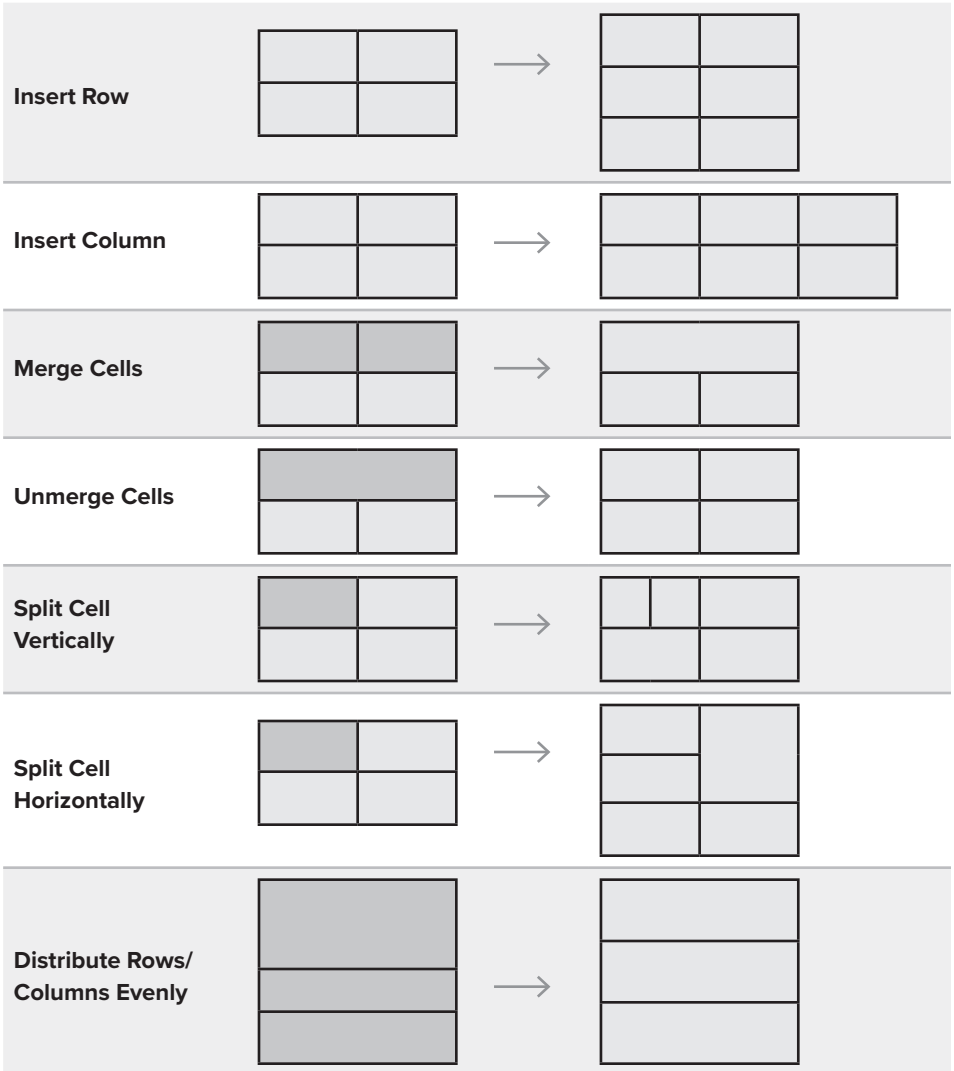


Table Options

These settings are:

- In **Table > Table Options**
- Some appear at the top of the screen when table cells are selected with the Type tool
- Some of these settings can be saved and reused with Win**dow > Styles > Table Styles**

TABLE DIMENSIONS

- Change the number of rows, columns, header rows, or footer rows

TABLE BORDER

- The outside outline of the entire table
- Stroke options inlude weight, colour, and type (solid, dashed, dotted, etc)
- For a borderless table, set the weight to zero, or the colour to none.

TABLE SPACING

- Set the spacing before and after a table in a text frame

ROW STROKES

- The inside horizontal lines
- Stroke options inlude weight, colour, and type (solid, dashed, dotted, etc)
- There are options for alternating patterns
- If you don't want visible lines, set the weight to zero, or the colour to none.

COLUMN STROKES

- The inside vertical lines
- Stroke options inlude weight, colour, and type (solid, dashed, dotted, etc)
- There are options for alternating patterns
- If you don't want visible lines, set the weight to zero, or the colour to none.

FILLS

- Use the alternating patterns here to automatically create striped tables (sometimes called "zebra" tables)
- Under "Alternating Pattern", the options for rows will create horizontal stripes, and columns will create vertical stripes
- The "fills" section of the Table Options menu only contains the settings for alternating patterns. To just choose fill colours for one or more cells, select those cells with the Type tool, and pick the colour from Swatches. There are stroke and fill colour swatch shortcuts in the table options that appear at the top of the screen in most InDesign workspaces when table cells are selected, and stroke/fill colour also appear in Cell Options.

Cell Options

These settings are:

- In **Table > Cell Options**
- In **Window > Type & Tables > Table**
- Some appear at the top of the screen when table cells are selected with the Type tool
- Some of these settings can be saved and reused with **Window > Styles > Cell Styles**

CELL INSETS

- The space between the edge of a cell and its contents.
- Can be different for top, bottom, left and right

Cell insets set to 0. Ihilit officae conseditatis entias et aut quam conseque versped quam fugit ullupta tempero	**Cell insets set to 0.125** Ihilit officae conseditatis entias et aut quam conseque versped quam fugit ullupta tempero

VERTICAL JUSTIFICATION

Top Top Top	Center Center Center
Bottom Bottom Bottom	Justify Justify Justify

TEXT ROTATION

T 0°	90° T
180° T	T 270°

ROW HEIGHT

At Least: Sets the *minimum* height for the selected row(s). Rows can be made bigger, and will automatically stretch to fit longer content.

At Least 0.25"
...but can expand vertically if the text is longer.

Exactly: Sets the *exact* height for the selected row(s). If the text/content is longer, the cell will not stretch, and the extra will be overset and hidden

Exactly 0.25"
No room for more

DIAGONAL LINES

- Lines across a cell that can be styled with weight, colour, and type in the same way as row and column strokes

These cells can still contain text.		