InDesign Intermediate

Learning Objectives
To work more efficiently with text and graphics in InDesign.

What you can expect to learn from this class:

- Create multiple pages document and Master Pages
- Insert page number and global elements; scripts
- More on handling graphics — scaling, captions, gradients, corner options, placing and aligning multiple images+
- Linking and embedding Excel data, Photoshop and Illustrator files
- Formatting text across columns, baseline grids and auto guides, drop caps
- Create and apply new paragraph and character styles
- Break link to style and edit styles; update links
- Create text on a path
- Typekit tools and CC Libraries

Who should attend this class?
You should have the basic knowledge of the InDesign interface and workspace; creating and saving new documents; using guides and rulers for visual aid; adding and flowing text boxes; creating contents; inserting graphics using basic fitting techniques; and applying and creating swatches.

Fundamentals
Elements that repeat from page to page should be placed on Master Pages. Those could be logo, heads, footers, auto page numbers, guides etc. To help with controlling text box placement on the page, it is recommended to use guides on Master Page.

Setting Preferences
- (Mac/PC) Choose Window > Pages to show the Pages palette.
- (Mac/PC) Choose InDesign > Preferences > File Handling > Create Links when placing text and spreadsheet files.
- (Mac/PC) Choose InDesign > Preferences > Type > Apply Leading to Entire Paragraph.

Creating a Master Page
A Master Page is a template that can contain guides, content and formatting that can be applied to new pages within a document. You can have more than one Master Page for one publication document. For example, if you were creating a newsletter, you can have a Master Page for the title page, for the article pages, for the advertisements pages, etc.
NOTE: InDesign automatically has one master created for you titled ‘A-Master’ – which can be edited to match your desired settings.
Add text or graphics to a Master Page when you want it to appear on all pages in the document.

To create a Master Page:

1. Go to the Window menu and make sure the Pages palette is selected.
2. In the Pages palette, click on the black triangle to open the pages menu.
3. Select New Master from the drop-down menu.
4. In the New Master window:
   • Type the prefix of the new Master Page
   • Type the name
   • If this new Master Page is based off of an existing master, select it from the drop-down menu
   • Select the number of pages the master will contain
5. Press the OK button.
6. The Master Page will be added to the Pages palette.

To edit the Master Page:

1. Double-click on the Master Page icons in the Pages palette:
2. A blank page or spread will appear.
3. Edit the Master Page according to desired preferences:
   • Add guides
   • Add content (i.e. – headers, footers, page numbers)

To apply Master Pages to actual pages:

1. In the Pages palette, click on the black triangle to open the pages menu.
2. Choose Apply Master to Pages
3. Select the master you wish to apply.
4. Type the page numbers you wish to change.
5. Press the OK button.
6. The changes will automatically take effect. Double-click on one of the body pages to see applied changes.

OR

1. In the Page palette, simply drag-and-drop the specific Master Page icon on top of the individual pages.
2. The changes will automatically take effect. Double-click on one of the body pages to see applied changes.
View Page Palettes

1. If you have a document with many pages, it is easier if you change the display to ‘Show Vertically’ and choose ‘Small thumbnail’.

2. From the Pages palette, choose Panel Options from the Options Menu (the Drop-Down triangle).

3. Uncheck the box next to Show Vertically under Pages.

4. Choose the ‘small thumbnail’ icon.

5. Click OK.

TASK
Create Multiple-Page Document using Two Master Pages

Create New Document
- Choose File > New Document.
- Facing Pages - check ON
- Number of Pages - enter 5.
- Unlink the Margins and enter 1.35” Top, 0.5” Bottom, 0.5” Inside and Outside.
- Column - choose 1. (Gutter value is irrelevant in this case.)

Master Page

1. Double-click on the Master Page A to open the layout.
2. Put some **Guides** in as shown above.
3. With the **Type Tool**, click and drag a box in the center bottom on the left side of Master Page A. Your cursor should be blinking inside the box now.
4. Choose **Type > Insert Special Character > Markers > Current Page Number**.
5. In the box, you should see an ‘A’. Double-click on it to highlight it. Change the font size to 18 using the **Character Formatting Controls**.
6. Repeat on the opposite page, this time choose **Markers > Next Page Number**.

All your document pages now show A-Master notation. Check this by double-clicking on the spread number. You should see the correct page numbers on each page.

**Create New Master Page**

1. Click the **Option Menu** button on the **Pages** palette and choose **New Master**.

2. In the New Master dialog box, under Prefix, use default **Prefix ‘B’**. For **Number of Pages** — enter 1. Click **OK**.
3. Pull a guide from the top and drop it at 6” as shown.

4. Choose **Type > Insert Special Character > Markers > Current Page Number**.
5. Simply drag the B-Master Page on top of **Page 5** to apply this template.

**Add Page Numbers**

1. Double-click on a **Master Page icon** in the **Pages** palette.
2. Select the **Type** tool by clicking once on it in the tool bar.
3. Click-and-drag to draw a text frame in the location on the Master Page where you want the page number to appear.
4. Go to Type > Insert Special Character > Markers > Current Page Number.
5. Make sure the Master Page has been applied to appropriate body pages.
6. Double-click on a body page to see if the actual page number appears.

Using Scripts - Make Page Numbers as Words Instead of Numbers

Scripts can be used to automate processes while you are developing your contents in InDesign. Try this exercise of using a simple script found on the web ‘writeoutnumbers.jsx’

**TASK**

1. To install scripts, choose Window > Utilities > Scripts.
2. Select the Users folder. Click the panel option menu and choose Revel in Finder to open the Scripts Panel.
3. Copy and paste the script inside the Script Panel. Close.
4. Go to your Master Page, choose the Type tool and type the symbol #.
5. Then, go back to your document page and double-click the script in the Scripts panel to run it.
6. The script will now turn the # into an actual number.

Scale an Image

**Scale an object using the Selection Tool**

1. To scale the frame and content together, use the Selection Tool to select the frame.
2. Hold down the Command (or Control on PC) + Shift key and drag to resize the object/text proportionally.

**Scale an image using the Scale command**

1. To scale the frame and content simultaneously, choose the Selection Tool to select the frame.
2. You can also choose Object > Transform > Scale or double-click the Scale Tool on the Toolbar to open the Scale dialog box.
3. Type a percentage value in the Scale X and Scale Y box. Make sure that the Constrain Proportions icon is selected if you want to maintain the original proportions of the object.
Scale an image using the Transform Panel

1. To scale the frame and content simultaneously, choose the Selection Tool to select the frame.
2. In the Transform Panel, type a percentage value in the Scale X Percentage or Scale Y Percentage box, and then press Enter or Return.

Rotating/Flipping an Image

Choose one of the Rotate/Flip tools on the context menu.

Corners Options

1. Select your image, choose Object menu > Corner Options.
2. Click on the Link icon to break it if you would like to adjust each corner individually.

Apply Border around an Image

1. Select the image and open the Swatches panel. Choose a stroke color.
2. Then open the Stroke panel. Choose the pixel size and style for your stroke.

Placing Graphics on top of Text Box

BEFORE you click the Open button to begin the Place process, take a look at the lower left corner of the Open window. There is the ‘Replace Selected Item’ checkbox. Checking the box:

• If the text box is selected, but your cursor is not active, the graphic will replace the text and the box will be converted into a graphic object.

If you Uncheck the checkbox, your graphic will be placed in its own graphic box on top of the text box. (You need to click and drag out a box for your graphic after File > Place.)

Add Static Caption to Image

Check the Create Static Captions option when you are
Add Anchor to Image
Anchoring an image to a position in the text ensures that it stays at that same position when text reflows.

1. Select your image.
2. Click and drag the anchor to the text position.
3. To release anchor, simply right-click on the Anchor point and choose Anchored Object > Release.
4. Choose View > Extras > Show Text Threads to display the connection of the anchor to text; or view/reposition text in Story Editor.

Create Guides for your Page
- From Layout menu > choose Create Guides, and enter 2x3.

Select, Place and Align Multiple Images

1. Select three images.
2. Hold down the Up arrow to cycle through the images and decide which one to place first.
3. Draw an image frame and don’t let go of your mouse, click the Up arrow twice and continue stretching your frame to add two additional rows to the page.
4. Let go of your mouse when you’re done adding enough frames for all your images.
5. Then, choose Fill frame proportionally.

Unconstraint your Image when Placed
While you are placing an image by dragging and drawing the frame simultaneously, you can hold down the Shift key to break the frame from keeping to the proportion of the image.

Linking to AI and PSD files
When you place a Photoshop or Illustrator file into InDesign, you can easily edit the original image by clicking on the Edit Original icon in the Links panel. After you have made changes in PS or AI and saved your file, ID file will prompt you to update with a yellow triangle.

Object Layers Options
When you place a Photoshop or Illustrator file into InDesign, you can right-click on the image and choose Object Layer Options. This will open up a dialogue box for you to see the individual layers you built in Photoshop or Illustrator, and let you hide/show them as desired.
Linking to Excel Data
When you import data from Excel to InDesign, InDesign will create a link to the Excel file by setting it in Preferences. When you make changes to the Excel file, the data in the InDesign document will also get updated automatically.

**TASK**  
**Insert and Update Excel Data to your Document**

1. First, choose InDesign > Preferences > File Handling.
2. Under Links, check the checkbox next to ‘Create Links When Placing Text and Spreadsheet Files’.
3. Choose File > Place.
4. Locate the excel file. Check the box “Show Import Options”. Click Open.
5. The Excel Export Options dialogue box appears.
6. Choose ‘Formatted Table’ and Cell Alignment - Center.
7. Click OK after you are finished.
8. At the loaded cursor, drag and draw a box in your document.
Edit and Update Data

1. Select the table.
2. Choose Window > Links to show the Links palette.
3. To edit data, click on the Update Original icon at the bottom of the Link Palette. This will launch Excel and you can make your edit.
4. Save your edit and close Excel.
5. Click once in the document and the excel data is now updated.

Working with Text

Leading - The vertical space between lines of type is called leading.

Tracking - Tracking is the process of loosening or tightening a block of text.

Kerning - The process of adding or subtracting space between specific pairs of characters.

Type on a Circle Path

To create text along a circle path, you first need to create a circle. Likewise, if you would like the text on a curve, you need to first use the pen tool to create a curve.

TASK
Create a Circle and Type along its Path

1. Choose the Ellipse Frame Tool (L).
2. Holding down the Shift key, click-and-drag to create a circle.
3. Activate the Color Palette (F6) assign a Fill color of Red and a Stroke color to Blue.
4. Activate the Stroke palette (F10) and assign a 2pt Stroke.
5. Click on Type Tool, select ‘Type on a Path’ tool.
6. Click once on the edge of the circle when you see the cursor with a (+) sign. (Click at the point where you want to start your text.)
7. You should see a blinking line. Start typing your text along the path.
8. Choose the Selection Tool and drag the text start and finish markers until they meet.
9. Choose Type on a Path Tool to highlight the text and use the Character Formatting Controls to adjust the font size and tracking until it fits the entire path.
Flip type on the Path

1. Highlight the type on a path using the **Type on a Path Tool**.
2. Choose **Type > Type on a Path > Options**.
3. Select the **Flip** option, and click **OK**.

Text-Frame Options, Paragraph and Character Palettes

**Text Frame Options – Change # of Columns**
1. Select text frame.
2. Choose **Object > Text Frame Options**.
3. Enter number of columns and gutter margins.

**Paragraph Palette - Drop Caps**
1. Select the first letter in your paragraph.
2. Choose **Type > Paragraph** to activate the palette.
3. Enter number of lines for **Drop Caps**.
4. Select the same paragraph and choose **‘Full Justify’**.

**Character Palette**
- Choose **Type > Character** to activate the palette.

Information on Text
- Choose **Window menu > Info** and put your cursor anywhere inside the text frame to check on overset text, word and paragraph counts etc.

Create Library Items
You can create library items that are like little stickies that you can easily drag onto your page to use.

1. Choose **File > New Library**.
2. Enter a **name** for your library and save.
3. Select an image or text and drag them into your library.
4. To use items in your library, simply drag them onto your page.

Convert Type to Graphics and Wrap around Object
If you wish to wrap text along the curve of a type rather than squarely around it, you need to first convert the type to a graphic element.

**Convert Type to Graphics**
1. Create a new text box and type the letter ‘A’.
2. Choose a script font - ‘Zafino’ (Mac) or ‘Vivaldi’ (PC), 48 pt.
3. Choose **Type > Glyphs**. (Not all fonts have glyphs.)
4. With the **Type Tool**, select the glyph letter ‘A’.
5. From the top menu, choose **Type > Create Outlines** to convert text into graphic.
6. Select the **Selection Tool**, click once to select the letter, not the outside frame.
7. Choose **Edit > Cut**.
8. Then choose **Edit > Paste** to paste the letter back into the document.
9. Use the **Selection Tool** to move graphic to desired location.
10. Choose **Window > Text Wrap**.
11. Choose the **Wrap around Object shape** button.
12. Use the **Direct Selection Tool** to further modify the letter as desired.

**Applying Gradients to Text**

**TASK**
Applying a gradient to a single word or block of text

**Create a gradient swatch**

1. In the **Swatches Panel**, from the **Options Menu**, choose **New Gradient Swatch**.
2. Type a name for your swatch.
3. Choose **Linear** or **Radial** for **Type**.
4. Click the first **Color Stop** on the gradient ramp. The **Stop Color** field box is now activated.
5. For **Stop Color**, you can choose an existing color from the Swatch Panel by choosing **Swatches** from the drop-down menu; or choose **CMYK** to mix a new color using the sliders.
6. Do the same for the last color in the gradient ramp.
7. To add color stop, hold down the **Command** key (Ctrl on PC) and click on slider.
8. Click **OK** to store the gradient in the Swatches panel.

**To apply gradient swatch to text**

1. Select a paragraph of text.
2. Choose the **Gradient Tool** in the toolbar.
3. From the **Swatches** panel, select the gradient swatch.
4. (Hold down the **Shift** key and) drag a line from top to bottom or left to right and apply the gradient to the text block.
5. Deselect by choosing the **Selection Tool**.
Formatting Styles

Paragraph Styles
Creating style sheets can help you save time and improve edit ability. You can follow steps below to create such a paragraph style.

TASK
Create and Apply Paragraph Styles

1. Open the Paragraph Styles palette (F11)
2. Click on the Create New Style icon located next to the trash can in the lower right corner of the palette.
3. A new ‘Paragraph Style 1’ is created.
4. Control-click (PC: Right-click) on ‘Paragraph Style 1’ and choose ‘Edit paragraph style1’.
5. The Paragraph Style Options dialog box appears with the default Style Name.
6. Rename this style name to e.g. ‘Headline’.
7. Under General, keep ‘No Paragraph Style’.
8. Under Basic Character Formats, define Font Family, Style, Size and Leading as desired. Click OK when done.

9. Select Type Tool.
10. Position your cursor in the Headline paragraph, and click on Headline to apply paragraph style.

Break Link to Style
To remove connection to a paragraph style so that it remains the same look even when the style got changed later.

1. Select the paragraph style.
2. From Paragraph Style panel, click the Option Menu > choose Break link to style.
3. Now the paragraph should show ‘No style’ (non-highlighted)
4. Now if you change the ‘Headline’ style, this is not affected.

Remove Local Formatting
To remove any local formatting to a paragraph style, simply click on Clear Overrides in Selection button at the bottom of the Paragraph Style Panel.
Character Styles
Sometimes you might want to apply a different style to just one word or a few words in a paragraph. You can follow steps below to create character style:

TASK
Create and Apply Character Styles

1. Open the Character Styles palette (F11)
2. Click on the New Character Style icon located next to the trash can in the lower right corner of the palette.
3. A new ‘Character Style 1’ is created.
4. Control-click (PC: Right-click) on ‘Character Style 1’ and choose ‘Edit character style1’.
5. The Character Style dialog box appears with a default label.
6. Rename this style name to ‘Bold Red’.
7. Under General, choose ‘None’ for Based On.
8. Under Basic Character Formats, define Font Family, Style = Bold, & Size as desired.
9. Then choose Character Color. Choose the Red color swatch. Or, double-click on Text Fill icon and create your own color, then click Add > Done.
10. Click OK to exit Character Style Options dialog box.
11. Select the text you want and click on Bold Red to apply Character Style.

Updating Links
We have talked about how images are linked to the document in InDesign, so if you move your linked images from one folder to another folder, you will get an error message the next time you open up your InDesign document.

1. Click OK, and open up the Links panel.
2. There is a red question-mark notation to the image that’s missing.
3. Double-click on the red question-mark notation to relink, or click the Relink icon at the bottom of the panel.
4. Navigate to find the missing image.
5. Once you have relinked the image, the error notation will disappear.
**TASK**

**Spanning Columns for Title**

1. Draw a text frame and fill with placeholder text.
2. Make 3 columns.
3. With the Text tool, select the paragraph in which you’d like to set the span and select Span Columns from the Control Panel.
4. Click on Span Columns button on the top context bar and choose Span 3;
5. Or click on and select Span Columns. Select how many columns to span, and set the spacing above and below the span if desired.
6. Click OK.

**TASK**

**Column Break**

1. Position your cursor at where you want it to start on a new column.
2. Choose Type > Insert Break Character > Column Break.
3. To remove column breaks, just hit Delete to remove the breaks.
TASK

Balancing Text Frames

If you would like to balance text evenly in two frames on a page, you can use the Selection Tool click and hold on the bottom of the text frame and scroll up and down to adjust the text flow.

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qui ut labore oditatint aliquem voluptas ipsit aciet la dolupta tectatibea dem re sitiasperi aut verest eum doluptatur?
Peruntiam, inimaio be ruptibus, cuptaque labori voluptatetur aut harum vero quis eventur as volupta velique rem estem qui atibus sitibus, ipitat quarro quidem faccata tisquodi volo intus, volor sim eatis immaginis must fugitib ustrum restem quis rem sequia velibus, tempel earum est laut em ipitatquia doluptatur, quatem deliquo bero voluptatate pa voluptur santiate dunte ma volorunt.

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Hyphenation

If you do not want any word in your document to be hypendated, you don’t have to fix it manually. You can select the Type tool, and uncheck the checkbox next to Hyphenate on the Formatting Palette.
Baseline Grid: Making a Trifold

1. To start, create a new file and choose **Letter Size**. Select **Landscape** as the orientation.
2. Make 3 columns.
3. Enter your content.
4. To align your text to the document baseline, choose **View menu > Grids and Guides > Show Baseline Grid**.
5. Use your **Selection tool** to select your text frame, click the **Align to Baseline Grid** button from your **Paragraph Formatting Controls**.

To adjust spacing between lines, with the text frame still selected, adjust the **Leading** button on the **Character Formatting Controls**.

To adjust spacing before or after a paragraph, with the text frame still selected, adjust the **Space Before** or **Space After** button on the **Paragraph Formatting Control**.
NOTE: When you are making a trifold, it is important to print a test copy. Check to make sure text frames are properly set after it's being folded into three parts. The width of the cover page can be slightly longer than the rest of the brochure when it's folded.

**Shortcuts**

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>W</td>
<td>Hide/Show Guides</td>
</tr>
<tr>
<td>Cmd+1</td>
<td>Zoom to 100%</td>
</tr>
<tr>
<td>Cmd+2</td>
<td>Zoom to 200%</td>
</tr>
<tr>
<td>Cmd +/-  (PC: Ctrl +/-)</td>
<td>Zoom In and Out</td>
</tr>
<tr>
<td>Cmd + Opt + 0 (PC: Ctrl +Alt +0)</td>
<td>Fit Spread in window</td>
</tr>
<tr>
<td>Cmd + Z (PC: Ctrl +Z)</td>
<td>Undo</td>
</tr>
<tr>
<td>Cmd + D (PC: Ctrl +D)</td>
<td>Place</td>
</tr>
<tr>
<td>Shift+Cmd-&gt;(PC: Shift+Ctrl)</td>
<td>Make Text Larger</td>
</tr>
<tr>
<td>Shift+Cmd&lt;- (PC: Shift+Ctrl)</td>
<td>Make Text Smaller</td>
</tr>
<tr>
<td>Cmd/Ctrl +G</td>
<td>Group Tool</td>
</tr>
<tr>
<td>Click + hold, drag over eyeballs</td>
<td>Hide Visibility</td>
</tr>
<tr>
<td>Opt/Alt +click on eyeballs</td>
<td>Hide Visibility except selected</td>
</tr>
<tr>
<td>Opt/Alt, hold and drag</td>
<td>Duplicate Shape</td>
</tr>
</tbody>
</table>

**Resources**

Adobe InDesign CS6 Classroom in a Book: Adobe Creative Team

Creative Suite 6 Design and Web Premium All-in-one for Dummies: Smith and Fred Gerantabee

Adobe InDesign Creative Suite 6 Design and Web Premium Classroom in a Book : Adobe Creative Team

Online Tutorials: [www.lynda.com](http://www.lynda.com)
Adobe Color Themes

Windows > Color > Adobe Color Themes

There are three sections in this panel – Create, Explore, My Themes

My Themes section displays all the themes you have saved from different devices. You can search for themes using Favorites or by typing the name of the themes.

Explore section displays all themes that are created by the community, and you can view by the drop-down menu to look for the most popular, most used etc.

All themes have options, choose the little triangle Actions > then choose Edit This Themes, Add to My Favorites, Add to Swatches panel etc.

Create > choose your colors, and Save themes to sync to Adobe Color Service, making it available for use of other desktop or mobile applications that use Adobe Color.

New Color Theme Tool

This tool allows you to create color themes based on artworks in your document, and give you options to adjust the theme to be more colorful, dark, deep etc. Press the Esc key on your keyboard to unload themes.

Select the New Color Theme Tool > click on an object in your artwork, or draw a marquee around an area of your artwork to create the color themes.

You can then add the theme to your Swatches, or to Adobe Color Services.

Adobe Libraries

Window > CC Libraries > access and share favorite colors, brushes

Creative Cloud Libraries, now available in InDesign, allow you to organize, access and share creative assets, such as colors, type, brushes and graphics. You can add character attributes as text styles. You can also copy your native InDesign library assets your Creative Cloud Libraries.

Note:
You cannot transfer character styles to Creative Cloud Libraries. However, you can transfer character attributes as text styles.

On different computers:

Libraries are automatically synced to Creative Cloud as they are created, so you don’t need to worry about saving, or accidentally deleting or overwriting an asset.

Photoshop and Illustrator CC:

Photoshop and Illustrator CC have the Creative Cloud Libraries built in, too. Any Library that you save from InDesign automatically becomes available for use in Photoshop and Illustrator as well. The same way, any Library that you save in Photoshop and Illustrator becomes available in InDesign.

Working offline:

Your libraries are there when you need them; no Internet connection is needed. You can access a local copy on your desktop offline.

Migrate native InDesign libraries content to Creative Cloud Libraries:

Easily migrate all or selected assets from native InDesign libraries to Creative Cloud Libraries. You can choose to migrate your native library assets to new or existing Creative Cloud Libraries.

For more information, see the article on Creative Cloud Libraries.

1. Choose Window > CC Libraries, and click the Library menu.
2. Choose Create New Library.
3. Enter a name for your Library. (You can create unlimited number of CC Libraries for your assets; and 1000 maximum assets per Library)
4. Highlight some text in your document, and then click Add Text Style button.
5. Click the View button to toggle between the thumbnail and the List views.

6. Select some artwork in your document, and click on Add Graphic button to the Library panel. A graphic thumbnail appears.

7. Now try to create a new document, open the CC Libraries. Select some text and click on the Text style.
8. Right-click on a graphic, and choose Use in Document.
9. To delete Library, choose Delete Library from the Options menu of the CC Libraries panel.
10. To collaborate and share your Library, click the Options menu, and choose Collaborate. You will invite your team members, who have a CC account, to share your library.
Typekit Fonts

Members of CC can access Typekit Fonts by downloading them to your Desktop for any applications.

Use Filter button to filter out all Typekit Fonts you have downloaded.

Missing Fonts can be found on Typekit

While the missing fonts are highlighted in your document, simply click Sync Fonts button at the bottom of the Missing Fonts panel. The fonts are updated in your InDesign document, and are available for use by any application on your computer.