

LAYOUT FOR YOUR BRAND STYLE GUIDE IN INDESIGN

This tutorial covers basic features of InDesign and steps involved in laying out pages for your BSG.

Creating a New Document

After opening InDesign, note the list of tutorials you can access by clicking the Learn button. Create a new document by clicking on the Create New button. By default, InDesign creates an 8.5" x 11" (51 picas x 66 picas) one-page document intended for printing. You can change the width, height, number of pages, and other features of the document in the Preset details panel on the right (select inches as your unit of measurement). Note that you can change these dimensions later in the Properties panel. You can also change the document dimensions by clicking on Document Presets and choosing a different preset size, or by selecting a Template from the collection.

For this exercise, set up a document that's 6" wide by 6" high, with 12 pages, and facing pages. The margins are set to .5" by default.

Click on OK. In the resulting new document, the white area indicates the document itself. The inner pink outline is the .5" margin; the recommendation is that all text should go inside of this margin, just to be sure it isn't too close to the edge and inadvertently cut off, although if you're displaying the document online or having it professionally printed this won't be a problem.

Step 1: Set up a 6" x 6" 12-page document with facing pages, as described above. Save the document as bsg.indd.

Select the Zoom tool (keyboard shortcut Z) and hold down the Option key while clicking to zoom out and see the document: it has a front and back cover, along with 5 sets of facing pages.

The Interface

The interface of InDesign is similar to that of Photoshop and other Adobe products. There are menus across the top of the screen with dropdown menus and sub-menus. The Toolbox has the basic tools and tool groups. Finally, there are panels that deal with special features and functions; view and hide these panels through the Windows menu in the application bar.

Layers in InDesign

Open the layers panel by going to Window > Layers. Layers in InDesign are not used as much as they are in Photoshop. You can create, delete, name, stack, change the visibility, lock, and otherwise manipulate layers like you do in Photoshop. Although you can put different elements on different layers, it's standard practice to put multiple elements on a layer in InDesign. If you have multiple elements on a single layer and you need to adjust the stacking order of the items (in other words, to move one item on top of or beneath another), you can right-click on the item and select Arrange from the dropdown menu; then send the item to the front or back as you wish.

Placing an Image

Go to File > Place (or Control/Command D) to place a graphic element in your document. Once you've selected the image, you can either click on the document to place the full-size image, or click and drag to draw the frame for the image. You can place graphics from a variety of file formats: jpg, png, psd, pdf, and others.

Step 2: Place your image in your document.

To resize the frame in which the image is automatically placed, use the Selection tool (keyboard shortcut is V) and drag on one of the squares on the bounding box around the image; remember to hold down the Shift key to resize the box proportionally. To resize the image itself, use the Direct Selection tool (keyboard shortcut is A) and resize proportionally. You can also right click on the image and select one of the options in the Fitting menu to make the image fit the frame or the frame fit the image.

When you place a graphic, it is either embedded in or linked to your InDesign file. By default, InDesign automatically embeds images that are 48K or smaller but for larger images it creates links. The advantage of embedding is that the graphic file is included in the InDesign file; your document is self-sufficient but it is also going to be larger. The advantage of linking is that your InDesign document will be smaller; however, when you go to print the document, you need to be sure that the image is included among the files that you give to the printer.

To determine if the graphic is linked or embedded, or to change its status from one to the other, use the Links panel.

Step 3: Open the Links panel (Window > Links) and click on the name of the image you just placed in the document. To embed the file, choose **Embed Link** in the Links panel menu (top right corner of the panel).

Viewing your File

At any point as you're working on your document, you can go to View > Screen Mode > Preview to see the document without all of the grids and guides—that is, to see how the document will look when it's printed out. Or a simpler way, just press the letter "W" on your keyboard.

By default, InDesign uses a "typical" display performance, with may not show your images at their fullest, clearest quality. To see what the images will look like for printing, you can change the Display Performance. Go to View > Display Performance > High Quality Display. Note that keeping the setting at High Quality may slow down processes as you work in InDesign.

Placing and Formatting Text

InDesign requires that you place text inside frames. You can create text frames in two ways: click on the Rectangle Frame tool (keyboard shortcut is F) in the toolbox and draw a text frame; or click on the Type tool and drag across the screen to the size you want. You can adjust the size of the frame by using the Selection tool (black arrow), clicking on a handle (smaller white square), and dragging; InDesign rewraps the text. Use the Type tool to type within the frame.

Step 4: Type a header to go above your image. Select the text and use the various formatting options in the Application bar to set the font, size, spacing, and other elements.

Typography

You can make the text in your book look more professional and be more readable by adjusting leading, kerning & tracking, and by using other typographic features of InDesign. Leading is the vertical space

between lines; kerning is the space between two characters, while tracking is the character spacing for a whole block of text.

Step 5: Add a short paragraph of text (to use lorem ipsum, go to [Type > Fill with Placeholder Text](#). Select the text, and use the leading tool in the menu across the top to adjust the vertical line spacing. Select all of the text or just a pair of characters, and use the kerning and tracking tools to adjust spacing.

Note that to use manual kerning, you don't select text but rather insert your cursor between the two characters that you want to kern.

When your text is larger than the frame that you have for it, the text will disappear from the frame or you will see a small red plus sign in the frame. To put all of the text in the frame, you can either use the Selection tool to resize the frame or you can right-click on the frame and select [Fitting > Fit Frame to Content](#).

Color in InDesign

You can draw shapes in InDesign with the Rectangle tool (keyboard shortcut is M), and the Ellipse and Polygon tool underneath it, as well as with the Line tool (keyboard shortcut is \). You can add a color strokes (that is, borders) and fills to your shapes and frames (text frames or image frames). Note that at the bottom of the toolbox there are separate small boxes for fill and stroke, along with arrows to change your selection. You can also use the Properties panel.

To create a new swatch, click on the Color tab and select a color; then click on the Swatches tab and the New Swatch icon at the bottom to add the color as a swatch. To adjust the color, double-click on it in the Swatches panel.

Step 6: Use the Rectangle tool to draw a rectangle on the document. In the Properties panel, select the color for the stroke and fill of the box; note that if the box is selected, the color should fill automatically.

Move the rectangle behind the title by right-clicking on the rectangle and using the Arrange option to send the rectangle backwards.

Saving and File Format Options

As you're working on the document, save it regularly as an InDesign (.indd) file by going to [File > Save](#) (or Control/Command S). When you're finished and ready to send it to the printer or otherwise distribute the document, you can save it in a variety of formats.

Go to [File > Export](#). From the Format dropdown menu, select the format (typically Adobe PDF Print). If you're exporting the file as a PDF, note that there are different PDF presets located under [File > PDF Presets](#). The Define option explains the function of each PDF preset.