

Lecture Notes for Adobe InDesign Webinar

- Welcome to the Webinar
 - ◆ Webinar procedure
 - * We'll begin with about an hour of lecture
 - * I'll be going fast, so you should just watch and take notes
 - * It would be best if you held your questions to the end of the lecture portion
 - * After the lecture, I'll take questions and then set you loose working on the Practice InDesign File assignment
 - * My lecture notes will be available to you after the webinar, as will a recording of the webinar on YouTube
 - * Please mute your webcam until the questions portion
 - * If you have questions and are an active member, then you may post them in the chat box; if you are not an active participant, you should post your questions to the webinar hashtag, #411webinar
- Introduction to Adobe InDesign
 - ◆ Page layout program used by artists, designers, and technical writers to produce complex document designs
 - ◆ Part of the Adobe Creative Suite
 - ◆ In this class, you'll be using InDesign in conjunction with Illustrator
- Open InDesign
 - ◆ On open, you'll see a quick launch panel that allows you to open recently opened documents and create new documents
 - ◆ Under "Create New," click "Document" to pull up the New Document Setup Window
- New Document Setup Window
 - ◆ Pages: set your number of pages
 - ◆ Facing Pages: set whether to do spreads or not
 - ◆ Page Size: set your page size and orientation
 - ◆ Columns: set the number of columns and gutter, if applicable
 - ◆ Margins: set the margins
 - ◆ More Options: reveals Bleed and Slug section for setting bleed space
 - ◆ You can also save preset document setups for later access
 - ◆ Let's set up a new document with two 10" x 8" non-facing pages
 - ◆ If you want to change something later, you can do that under File > Document Setup
- Introduction to the Interface
 - ◆ Each InDesign document appears in its own tab (illustrate this by creating a new document)
 - ◆ On the left side of the screen, you'll see the Toolbox; this is where you can access different tools
 - * Any tool icon with an arrow in the bottom-right corner has hidden tools underneath it

- * Access these hidden tools by clicking and holding or right-clicking
- ◆ On the right side of the screen, you'll see the Panels
 - * Panels can be added by opening them with the Window menu, then dragging them into the panel dock
 - * By going to Window > Workspace, you can also change the set of panels that are open and save preset groups of panels as workspaces
 - * For now, make sure you have the following: Pages, Layers, Stroke Color, Swatches, Gradient, Character Styles, Paragraph Styles, Object Styles, Hyperlinks, and Text Wrap
 - * Any panel you open will have a number of different options; you can find more by opening the fly-out menu from the top-right corner of the panel
 - * You can collapse any panel by clicking the double-arrow icon in the top-right corner of the panel
- ◆ Above the document area is the Control Panel; this is a quick-access area for common settings that changes depending on the tool you have active
- ◆ Above that is the Application Menu, where you can apply almost anything you want in InDesign
- Layers
 - ◆ Sometimes your content will overlap; in those cases, InDesign decides which content will show up on top with layers
 - ◆ Layers also allow you to organize your content for quick and easy selection
 - ◆ Open the Layers panel; double-click "Layer 1" and rename it "Text"
 - ◆ Create two new layers, named "Images" and "Drawing"
 - ◆ Anytime you create an item in a layer, it will show up with the color of the layer
 - ◆ You can also select all items in a layer by clicking the square next to the layer name
 - ◆ From here on out, select the appropriate layer before you put content into it
 - ◆ If you put something into the wrong layer, you can put it in the right layer by selecting the item(s) and clicking and dragging the square from the wrong layer to the right layer
- Frames
 - ◆ The most used tool in InDesign is the rectangle frame
 - ◆ Frames are empty containers that can have either text or graphics inside them; they are the base unit of InDesign
 - ◆ You may create any number of shapes of frames, but rectangle frames are the most common by far
 - ◆ Once you've selected any shape or frame tool, you have two options: click to input exact size or click and drag to size manually (hold down shift to make all dimensions identical)

- ◆ Create an empty rectangle frame now
 - ◆ To add text to a frame, double-click it and start typing or click the Type tool and click inside the frame
 - ◆ You can also add pre-existing text or graphics files with File > Place
- Fitting, Links, Display Performance, and Threading
 - ◆ When you place graphics, they will place at full size, no matter the size of the frame
 - ◆ To resize an image within a frame, right-click it and go to Fitting; “Fit Content Proportionally” is the most common and useful of the fitting options
 - ◆ To select an image (not the frame), click the lens icon in the middle of the image
 - ◆ When you place an image, it does not actually embed the image; rather, it creates a link to the image file and then shows a “preview” of the image
 - * This will become particularly important when we get around to saving and sharing InDesign documents
 - * If you move an image file on your computer after placing it, you’ll need to relink it using the Links panel
 - * For now, though, it’s important in that occasionally, the graphic you placed may look pixelated or fuzzy; that’s a function of the image “preview” taking shortcuts, and you can change it (if it bugs you) by right-clicking the image and selecting Display Performance > High Quality Display
 - ◆ With text frames, you have the option of “threading” to create a link between two text frames; if you change the text in one threaded frame, the text in all subsequent threaded frames will follow along, just as if you were working in a word-processor window
- Grouping, Locking, and Guides
 - ◆ You can group items together, meaning they will move as a single item, by selecting them and right-clicking and selecting “Group”
 - ◆ You can lock items on the page, meaning they will not move until unlocked, by right-clicking and selecting “Lock”
 - ◆ You can create guides, invisible grid lines for your own reference and for quick and easy snapping, by clicking either ruler and dragging onto the page
- Pages and Masters
 - ◆ An InDesign document starts with the number of pages you specified in the New Document Setup Window
 - ◆ You can add and delete pages with the Pages panel
 - ◆ Inside the thumbnail view for each page, you’ll see an “A”; each page has a master page applied to it (much like the master slide in PowerPoint), and those have the default A-Master applied
 - ◆ Double-click the A-Master to select it; afterward, any changes you make to the page will be on the A-Master (and thus any page with the A-Master applied)

- ◆ You can also use the fly-out menu to create other masters, such as if you want the even and odd pages to have slightly different master setups
- Character and Paragraph Styles
 - ◆ Styles are an important feature in InDesign, one I want to make sure you're using every step of the way
 - ◆ A style is a group of settings and effects that you can apply across text, graphics, or frames; when you change the settings of the style, it changes everything that has that style applied to it
 - ◆ There are two options for text styles: character and paragraph
 - * Character styles are used for small chunks of text, such as title, section headers, headlines, hyperlinks, or captions
 - * Paragraphs styles are used for large chunks of text, namely paragraphs
 - ◆ Let's create a paragraph style; they work basically same, just with fewer options for character styles than paragraph
 - ◆ Explore the options in the style editing window
 - ◆ Make sure to apply the style by selecting text, then clicking the name of the style
- Object Styles
 - ◆ Character and paragraph styles apply to text, but object styles apply to objects, meaning drawing shapes and the frames for either text or graphics
 - ◆ Object styles include things like stroke, fill, text wrap, and effects; we'll cover stroke, fill, and text wrap later, but I'll point you to the effects now
 - ◆ Create a new object style and explore the effects
 - * The most common (and tasteful) effects are Transparency, Drop Shadow, and Feather, though the other ones can be used well in certain circumstances
 - ◆ You can also use object styles to apply rounded corners with Stroke & Corner Options
 - ◆ As with character and paragraph styles, you need to apply them; once applied, if you change the style settings, it will change on the appropriate objects
- Text Wrap
 - ◆ There will be many times when you want to place graphics within the area covered by a text frame and wrap the text around them
 - ◆ As I noted before, you can apply text wrap through the Object Styles panel, but everything in object styles can be applied on an individual basis, which is how I'll show you to do these things from here on out for simplicity's sake
 - ◆ Select the object you want the text to wrap around (not the text frame itself); you may apply text wrap to multiple objects as a group
 - ◆ Open the Text Wrap panel, and you'll see the wrap type options along the top

- * “Wrap around bounding box” is the simplest and will wrap around a rectangle (the bounding box) around the object; for rectangular objects, it doesn’t make a difference, but it does for other shapes
 - * “Wrap around object shape” will wrap around the actual object shape
 - * “Jump object” and “Jump to next column” will skip lines around the object
- ◆ Sometimes you will want to wrap around an image on a white background; to do so, you have to create a clipping mask that will basically tell InDesign to ignore the white background
 - * Select the image and go to Object > Clipping Path > Options
 - * Adjust Threshold and Tolerance as necessary
 - * Select the frame, go to the Text Wrap panel, select “Wrap around object shape,” and under Contour Options, select “Same as Clipping”
- Drawing in InDesign
 - ◆ Vocabulary necessary for drawing
 - * When you draw with InDesign, it creates what are called “paths”; a path is essentially all the data involving with a shape looks like
 - * Paths have individual points, known as anchor points, and segments, or the lines between two anchor points
 - * Paths can be open (e.g., a line) or closed (e.g., a circle)
 - * All paths can have a stroke, which affects the path itself
 - * Closed paths can have a fill, which affects the area inside the path
 - ◆ Create a line with the Line tool; as before, if you click you can specify the length of the line, and if you hold shift while dragging, you can snap to 45-degree increments
 - ◆ Apply stroke with the Stroke panel; by default, InDesign applies a 1-point solid black stroke
 - ◆ Create a rectangle with the Rectangle tool
 - ◆ Toward the bottom of the Toolbox are two overlapping squares; these are quick views for stroke and fill; the one on top is the one you have selected
 - ◆ Select fill and go to the Color panel; apply a color (we’ll cover color more in depth in a bit)
 - ◆ Create an ellipse with the Ellipse tool
 - ◆ Create a polygon with the Polygon tool
 - * Default for the Polygon tool is a hexagon
 - * Click to set number of sides and star inset
 - * Star inset allows you to create traditional stars, six-pointed stars, and starburst patterns
 - ◆ Change an existing shape to another with Object > Convert Shape
 - ◆ Change an existing shape to a frame with Object > Content > Text/Graphic

- ◆ Change the dimensions of an existing shape in the Transform panel
- ◆ Resize and rotate an existing shape (or frame) by mousing over the corners of the bounding box
- ◆ There are other drawing tools available in InDesign, including Pen and Pencil tools; we'll cover these when we get to Illustrator, where more complex drawing is common
- Color in InDesign
 - ◆ We've already seen how to apply stroke and fill, but now we'll look at how to find just the right color and set up custom swatches for use throughout an entire document
 - ◆ Swatches are your painter's palette, your set of colors you can quickly and easily turn to throughout your document
 - ◆ Open the Swatches panel and using the fly-out menu, create a new color swatch
 - * You can change the color mode to RGB if you want RGB color
 - * You can also use colors from existing Pantone color libraries under Color Mode
 - * Play with the sliders or input specific values
 - * Hold shift and drag the sliders to create tints of an existing color
 - * Name your swatches appropriately for easier access
 - ◆ Go back to the Swatches panel and using the fly-out menu, create a new gradient swatch
 - * Much like colors, gradients can be applied to stroke, fill, or text
 - * Gradients come in radial and linear versions
 - * You can change stops to adjust the gradients
 - * Use gradients sparingly, and if you do use gradients, you should generally use closely related colors
- Hyperlinks
 - ◆ Add hyperlinks to external URLs or other spots in the document with the Hyperlinks panel
 - ◆ Create a character style called "Hyperlinks" and style the hyperlinks how you want them (e.g., blue and underlined)
- Preflight, Saving, Exporting, and Packaging
 - ◆ At the bottom of the screen is a green or red "light" that signals the Preflight errors; double-click to open the Preflight panel, where you can identify errors prior to saving, exporting, and packaging
 - ◆ To save an InDesign file for your own later use, go to File > Save
 - ◆ To export to a finished file format, such as PDF, go to File > Export
 - ◆ To share an InDesign file with others, go to File > Package, which will create a file folder with all the relevant files for others to see and edit your InDesign document