A Beginner's Guide to InDesign software

InDesign Basics 2009

1. General Tips & Reminders
    a. When you're done with a tool, always deselect it! When in doubt, click the black arrow.
    b. To find a palette, choose the Window dropdown.
    c. A plus (+) in a text box means text is hidden. Click on the + to load your cursor, and place it elsewhere. Or enlarge your box.
    d. Always place an image! Do not paste.
    e. Preflight before exporting to catch missing links or improperly placed images.
    f. To clone a box of any kind: select your black arrow, hold your Alt key, click & hold on the box, and pull it to a new location.
    g. There are always 3 ways to do everything.

2. New document = file/new/document. Set your:
    a. Number of pages
    b. Number of columns
    c. Margin sizes
    d. Check inches/picas (edit/prefs/general/units…) . To reset them, go to edit/preferences/units & increments.
    e. Save as (your document name).

3. Text import / entry
    a. Using the Rectangle Tool (box without " x") or the Text Tool ("T"), click & drag inside your document to create a text box.
    b. Import your text doc using CTRL-D or using "place" command.
    c. You may also type directly into the text box.
    d. If you place text in a Rectangle Frame tool ("x" box), it will turn into a text box.

4. Paragraph styles
   To create a style that can be recognized by InDesign for Table of Contents titles:
    a. Go to Type/paragraph/paragraph styles/new paragraph style
    b. Choose the dropdown and select New paragraph style
    c. Format text the way you want it.
    d. Name it.
    e. Save it.
    f. To use it, choose the paragraph symbol in your overhead menu bar; then select the style name from the center dropdown. Or select it from windows/type & tables.
    g. You can also use this sequence to create new character styles for general text.

5. Images
    a. Using the Rectangle Frame Tool (box with the" x") click & drag inside your document to create an image box.
    b. Place your picture (CTRL-D).

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    c. To resize, choose your black arrow tool click the box, then choose one of the 5 icons at the center of your menu bar to fit content or frame as you like it.

    d. Wrap text around an object using object icons on the menu bar. If icons are not present, choose window/text wrap (Alt+ctrl+W).

    e. To move or position your image within the box, choose the Direct Selection Tool (white arrow).

    f. To embed an image, choose the image. Then choose the links palette, select the dropdown menu, and choose Embed.

6. Graphics

    a. Create a circle or multi-pointed star by clicking and holding on the rectangle box, then choosing the hidden ellipse or polygon tool. You can ….

    b. Color it. (use eyedropper in your toolbar.)

    c. Type text in it. ("T" inside the toolbar)

    d. Rotate it. (choose Object/Transform from menu bar)

    e. Type text on a path around it. (choose Type/Type on a path from your menu bar)

7. Links

    a. Step 1: (Important – do this first!) Create a hyperlink destination.

        i. Highlight your intended link.

        ii. Right click. Choose Interactive/New Hyperlink Destination

        iii. In the pop-up, choose the type of link (e.g., URL); enter a short name for it and enter the link address. Click OK.

    b. Step 2: Create a hyperlink.

        i. Rehighlight your intended link, if it is no longer highlighted.

        ii. Right click. Choose interactive/New Hyperlink.

        iii. In the pop-up, choose the type of link; find and choose the name you just created in the Name field drop-down.

        iv. Choose the appearance characteristics you woul d like for your link. Click OK.

    c. To edit a link, highlight it and double click on its name in your right-hand hyperlinks palette. To find the palette, choose window/interactive.

8. Page numbers

    a. Create a text box in your Master page. Place it where you would like your page number to appear.

    b. Using your Text tool "T", click in the box. Then …

    c. Select Type/Insert Special Character/Markers/Current page number.

9. Table of Contents

    a. Go to Layout / Table of Contents in the menu bar.

    b. Enter your TOC title, set style for title.

    c. Choose the styles InDesign should seek to include as content titles.

      d. Under Style, choose the way those titles should appear in the TOC. Choose hyperlink.

10. Publish to pdf.
    a. Check for problems by choosing File/Preflight.
    b. If Preflight indicates missing links, images, or text, fix the problems.
    c. Choose File/Export to create your pdf. A popup box will appear that lets you customize the appearance and interactivity of the export.
    d. If you have links or interactive elements, choose the appropriate click boxes in your export pop-up window.

11. Master Pages.
    a. Double click in the Master icon on the palette OR choose the master page from the pages numbered at the bottom to work in the Master.
    b. Anything you save in the Master will be applied to pages based on that Master.
    c. Create new masters using the dropdown menu in the palette.
    d. Drag any page into the Master section of the palette to make it a Master.
    e. To unlock an item from a page without removing it from the Master, click and hold on both your Ctrl and Shift keys and click your mouse on the item. Then use your black arrow to select it. Edit or remove it.

12. Questions? Contact Jacki Betsworth: betsworth@macalester.edu, 651-696-6345.