InDesign QuickStart

Although InDesign is a complex program that lets you do everything from designing a fashion magazine to indexing a book to generating separation plates for professional printing, you can get started building documents with just a few simple skills. If you're in a hurry to get started on a document — or you have a job interview tomorrow based on your proficiency in InDesign — work through the steps in this section. You'll learn the basic building blocks of documents (frames and lines) and the two primary tools (Selection and Direct Selection).

By all means, do not assume that these steps provide all you need to know about InDesign. From here, head to related sections of the book and explore the full functionality of the program. If you're not sure where to start, figure out what you'll be doing the most. For example, if you'll be flowing text into a newsletter template, head to Part IV, "Text Fundamentals."

To create the sample document shown in Figure QS-1 — an annual compendium of case studies from a publication called *IT Wireless* — you'll need InDesign, a text file from a word processing program such as Microsoft Word, a graphic file such as a TIFF file, and a laser or inkjet printer. You can follow the steps exactly (substituting your own text, graphic, and fonts), or you can vary the design as much as you want. (You can download the text and graphics used in this QuickStart example at `www.InDesignCentral.com/QS.html`. You'll have to supply your own fonts, however.)

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In This QuickStart

Creating a new document

Working with frames

Working with lines

Working with text and graphics

Creating and applying colors

Printing a composite

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Figure QS-1: Combining formatted text and several graphics with a few simple frames and lines produces a completely designed magazine article.

Creating a New Document

When you create a new document in InDesign, you're actually specifying the final size and setup of the pages in the document. Note that in this QuickStart, I provide measurements in picas, which is a more standard measure in the layout world, and then provide the equivalent measurement in inches.

1. **Start InDesign.**

2. **Choose File ➪ New ➪ Document, or press ⌘+N or Ctrl+N.** The New Document dialog box appears (see Figure QS-2).

3. **In the Page Size pop-up menu, choose Letter.**

4. **Select the Facing Pages option.** Because this is a magazine printed on two sides, you need both left- and right-page versions.

5. **Select the Master Text Frame option.**

6. **Set the number of columns to 2, with a gutter width of 1p6 (0.25 in).**

7. **Set the margin guides at 4p6 (0.75 in) for the top and inside, 3p6 (0.583 in) for the bottom, and 3p (0.5 in) for the outside.** Note that in this example InDesign has been set with picas as the default measurement for vertical and horizontal measurement, one of two typical settings for publications. (The other is to set horizontal at picas and vertical measurements at inches.)
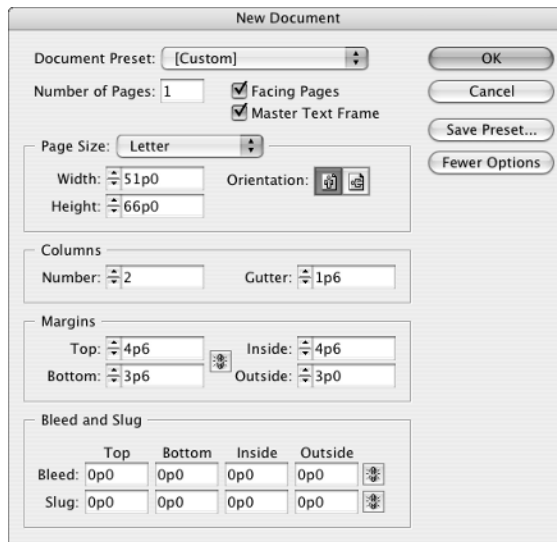
Figure QS-2: Set up the page size and other attributes for your document in the New Document dialog box.

8. **Click Save Preset, and give these specifications a name.** Assigning a name to these specifications lets you select these exact settings for future documents for this publication by choosing the Preset name from the Document Preset pop-up menu.

9. **Click OK to create the new document's new layout.** InDesign creates one 8½-×-11-inch page.

10. **Choose File ➪ Save As, or press Shift+⌘+S or Ctrl+Shift+S.**

11. **In the Save As field, type** ITW Case Studies 2005.indd, **as shown in Figure QS-3.** Choose a location for the file, and then click Save.
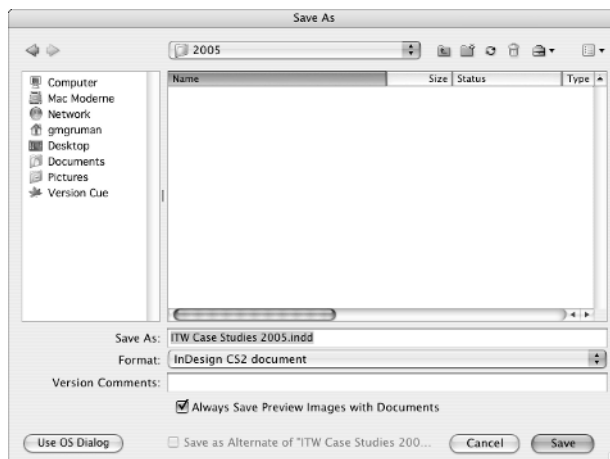

Figure QS-3: Use the Save As dialog box to name a new document.

Cross-Reference

For more information about creating a new document, see Chapter 4.

Working with Frames

By using the Master Text Frame option when creating the new document, you've already created the frame, or container, for the article text. But the article has colored frames at the top for the story title that need to be created via frames.

1. **Select the Rectangle Frame tool.** To see the names of tools, point at them until a Tool Tip appears.

2. **Click and drag to create a frame that is approximately 21p (3.5 in) wide and 4p (0.667 in) tall, as shown in Figure QS-4.** You'll fine-tune the size and placement in the next steps. The new frame is selected, as indicated by the white handles. If the frame becomes deselected in the following steps, click on it to select it.

3. **Highlight the X field in the Control palette (Window ➪ Control, or Option+⌘+6 or Ctrl+Alt+6), which specifies the item's origin across (placement from the left edge of the page); type** 4p6 **in this field.** Make sure the upper-left square is black (in the grid of nine squares)at the left of the palette; this controls what the coordinates are based on. Click that square to make it black (active) if it's not already black.
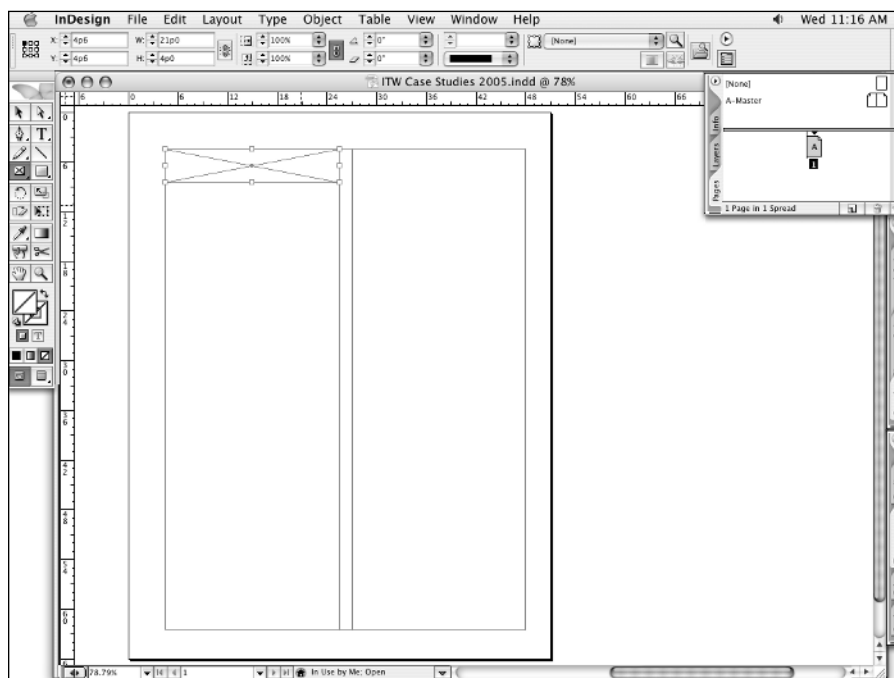

Figure QS-4: Use any of the frame tools to create background shapes into which you will import a picture. Use the Control palette (at the top) to precisely control its position and size.

4. **Tab to the Y field, which specifies the item's origin down (placement from the top of the page); type** 4p6 **in this field.**

5. **Tab to the W field, which specifies the item's width; type** 21p **in this field.**

6. **Tab to the H field, which specifies the item's height; type** 4p **in this field.**

7. **Press Return or Enter to reposition and resize the frame according to the values typed.**

8. **Choose Item ➪ Duplicate, or press Option+Shift+⌘+D or Ctrl+Alt+Shift+D.** If necessary, first click on the new frame to select it.

9. **Highlight the X field in the Control palette, and then type** 25p6**.**

10. **Tab to the Y field, and then type** 4p6**.**

11. **Tab to the W field, and then type** 22p6**.**

12. **If the H field is not already set to 4p, type** 4p **in its field.**

13. **Press Return to reposition and resize the second frame, as shown in Figure QS-5.** Later, you will add color to this frame.

Cross-Reference

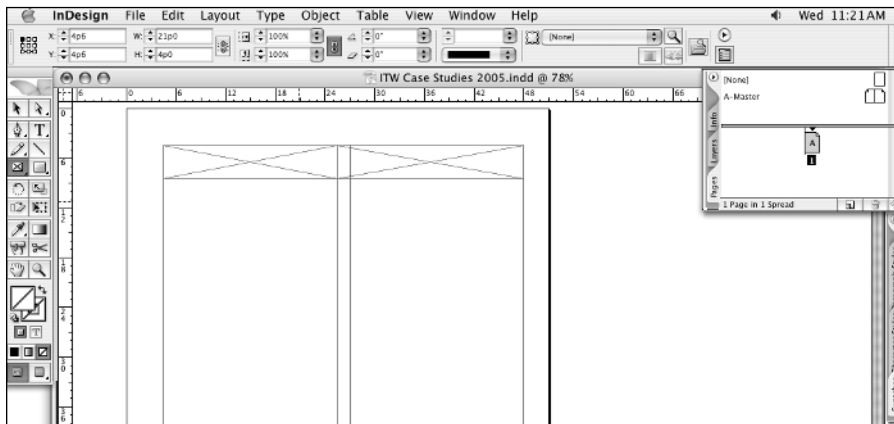For more information about working with frames, see Chapters 9 and 10.

Figure QS-5: Resizing and repositioning the second frame with the Control palette

Working with Text

In InDesign, text goes inside a text frame. You can type text into the frame or import a text file in various formats. Once text is inside the frame, you can change the font, size, color, and many more options. First, you'll create text frames and type text into them.

1. **Select the Type tool.** You can also use the Rectangle tool or the Rectangular Frame tool.

2. **Click and drag to create a frame that is approximately 45p (7.5 in) wide and 6p (1 in) tall, as shown in Figure QS-6.** Select the new frame with the Selection or Direct Selection tool, as indicated by the white handles. If the frame becomes deselected in the following steps, click on it to select it.
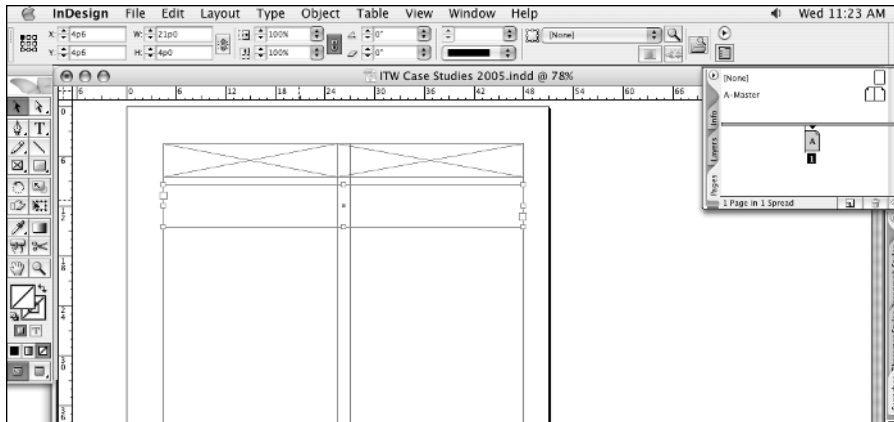
Figure QS-6: Use the Type tool to create a container for text.

3. **To size and place the frame precisely, type the following values in the Control palette: X:** 4p6, **Y:** 9p6, **W:** 43p6, **H:** 5p0.

4. **Select the Type tool, and then click in the new frame that will hold the story's headline.**

5. **Type the words** Public Safety's Second Wireless Wave **in the frame.**

6. **Highlight the entire phrase and choose a different font from the Control palette's Font menu (the example uses Frutiger).**

7. **Choose a typestyle from the Type Style menu (the example uses 65 Bold).**

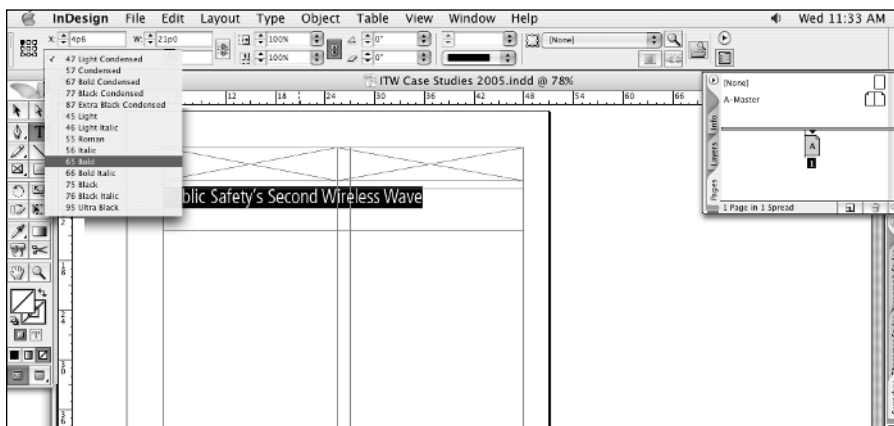8. **Choose 28 pt from the Font Size menu, as shown in Figure QS-7.**

Figure QS-7: When text is highlighted, you can format it using controls on the left side of the Control palette.

9. **In the frame at upper right, enter two paragraph returns and type the phrase** CASE STUDY **(in all caps).**

10. **Highlight the text** *CASE STUDY* **and apply the font Frutiger 76 Black Italic to it; make the point size 12 pt.**

Now you'll put text in the text frame that was created through the Master Text Frame feature earlier:

1. **Choose File ⇨ Place, or press ⌘+D or Ctrl+D.** The Place dialog box appears.

2. **Locate a text file in a format such as Microsoft Word.**

3. **Select the Show Import Options option.** The file used in the example has just two style sheets in use: Normal and Headline 2.

4. **Click to select the text file, and then click Open.** The Microsoft Word Import Options dialog box appears, as shown in Figure QS-8.
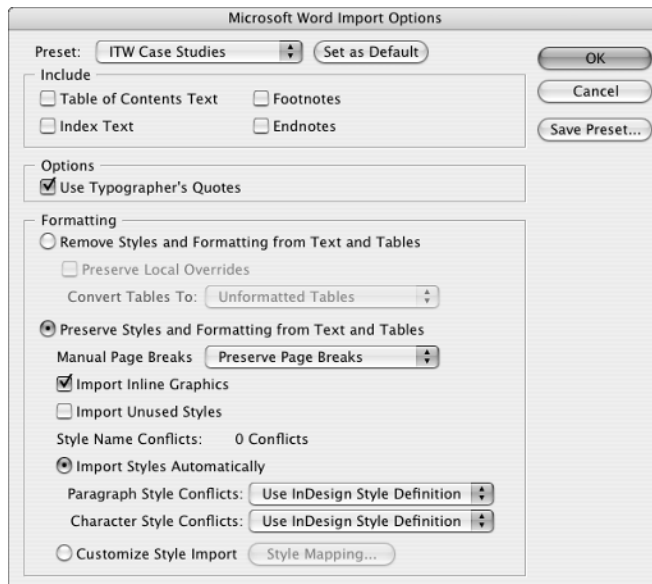

Figure QS-8: Choose File ⇨ Place, or press ⌘+D or Ctrl+D, to import text from a word processor.

5. **Be sure that the Use Typographer's Quotes option is selected.** In most cases, you will want the Import Styles Automatically option selected, with both the Paragraph Style Conflicts and Character Style Conflicts pop-up menus set to Use InDesign Style Definition. You can save Word import settings for reuse later by clicking Save Preset. Click OK to import the file. InDesign will show the loaded-text icon (it looks like a tiny paragraph) that indicates a file ready to be placed into a frame. (If you do not have a text file to import, simply type another sentence in the frame.)

Note   If the text file you import does not fit in the frame, a red square in the lower-right corner indicates that text is overflowing. There is no need to worry about that for these purposes.

6. **Click the two-column master text frame to pour the text into it.** Figure QS-9 shows the result.

7. **Because the first page of the article has the two empty frames at the top as well as the headline frame, you'll want to resize the master text frame for this page so the story text doesn't overprint the other frames.** (You can also set text wrap for each of those frames using the Text Wrap pane, covered later in this QuickStart.) To resize, use the Selection tool to drag the middle frame handle at the top of the frame, and drag the frame's top down below the three other frames.

With the text placed, you now need to format it. Follow these steps:

1. **With the Type tool, click anywhere in the text and highlight all the text using ⌘+A or Ctrl+A.**

2. **Choose Type ⇨ Character, or press ⌘+T or Ctrl+T, to open the Character pane and select a font (the example uses ITC Veljovic), select a typestyle (Book, here), set the point size to 9.5 pt, and set the leading to 11 pt.** You can also use the Control palette to set these settings (be sure to click the A icon to see its character settings). Figure QS-10 shows the pane and the results.

3. **Make sure all the text is still selected, and choose Type ⇨ Paragraph, or press Option+⌘+T or Ctrl+Alt+T, to open the Paragraph pane.**
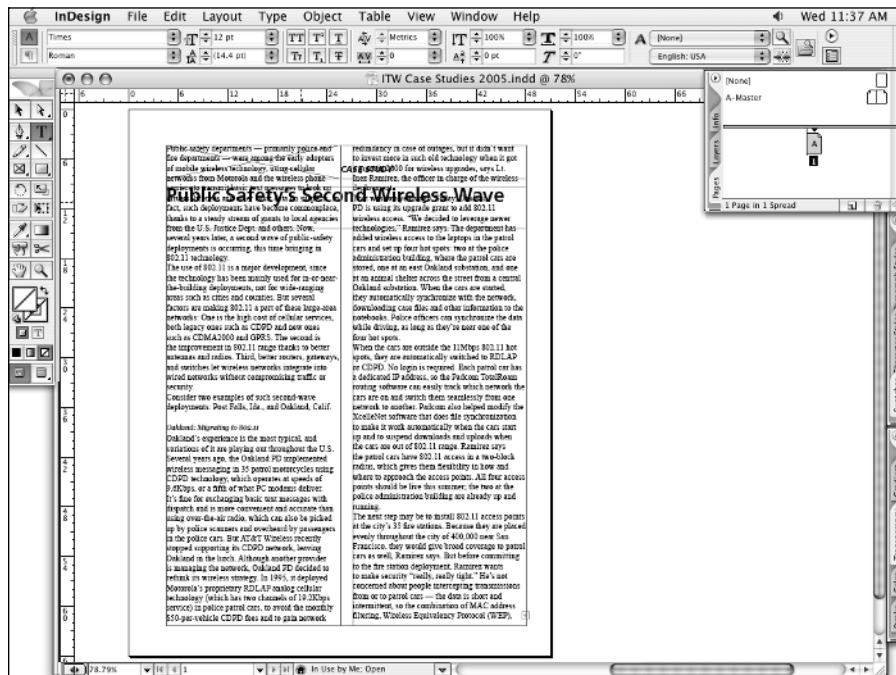

Figure QS-9: When text is placed into the master text frame, it overprints other frames that overlap it.
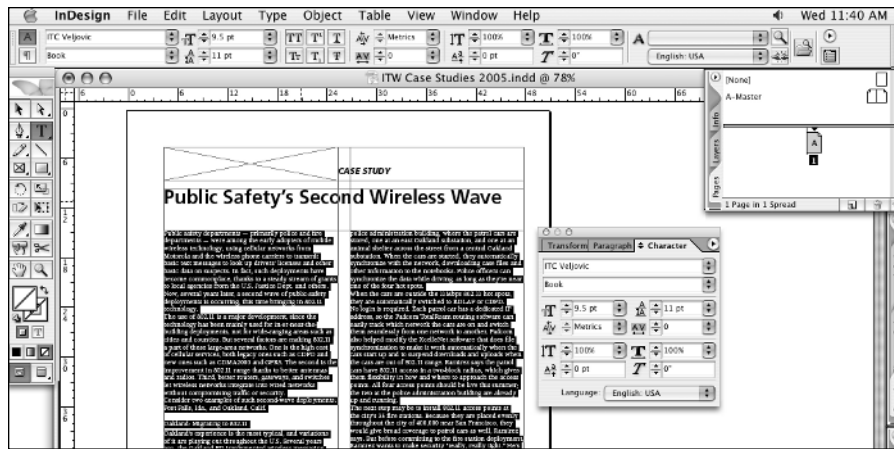
Figure QS-10: Use the Character pane or Control palette to set the font, typestyle, point size, and leading.

4. **Make sure the alignment is set to Justified, the first-line indent to** 0p10**, and the Hyphenate option is selected, as shown in Figure QS-11.** You can also use the Control palette; just be sure to click the ¶ icon to see its paragraph settings.
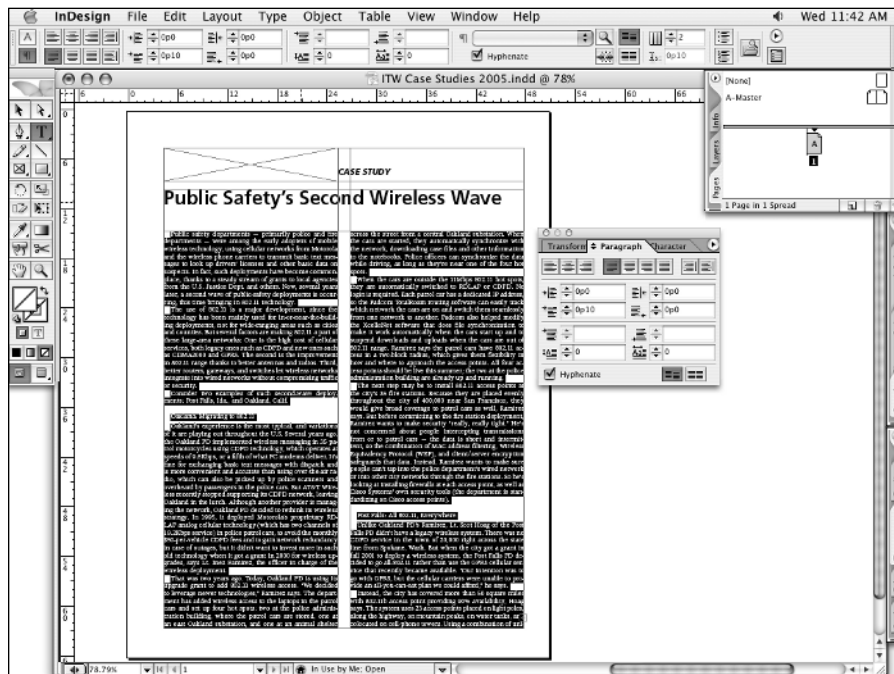

Figure QS-11: Use the Paragraph pane or Control palette to set the justification.

5. **For the first paragraph, add a drop cap by clicking the paragraph with the Type tool and choosing Drop Caps & Nested Styles from the Paragraph pane's palette menu or by pressing Option+⌘+R or Ctrl+Alt+R.** Type **4** in the Lines field and **1** in the Characters field. Click OK. In the Paragraph pane, change the first-line indent to 0p. Highlight the first letter in this paragraph, and then go to the Character pane and change the font to **Frutiger** and the typestyle to **65 Bold**.

6. **Find the internal section headlines in the story and format them to be left-aligned, hyphenation turned off, the first-line indent set to** 0p**, space above to** 1p**, space after to** 0p3**, the point size to** 11 pt**, and the font to** Frutiger 65 Bold **using the Paragraph and Character panes or by using the Control palette.**

7. **Find the paragraphs that immediately follow the internal headlines and change the first-line indent to** 0p **using the Paragraph pane.** Figure QS-12 shows the results of all this text formatting.

8. **If you will be creating pages with the same type specifications, create styles from the formatted text:**

   a. **Start with the drop cap: Highlight the text with the Type tool, and then choose New Character Style from the Character Style pane's palette menu.** (Choose Type ⇨ Character Styles or press Shift+F11.) Provide a name at the top of the New Character Styles dialog box, verify the attributes in the Basic Character Formats pane, and then click OK.
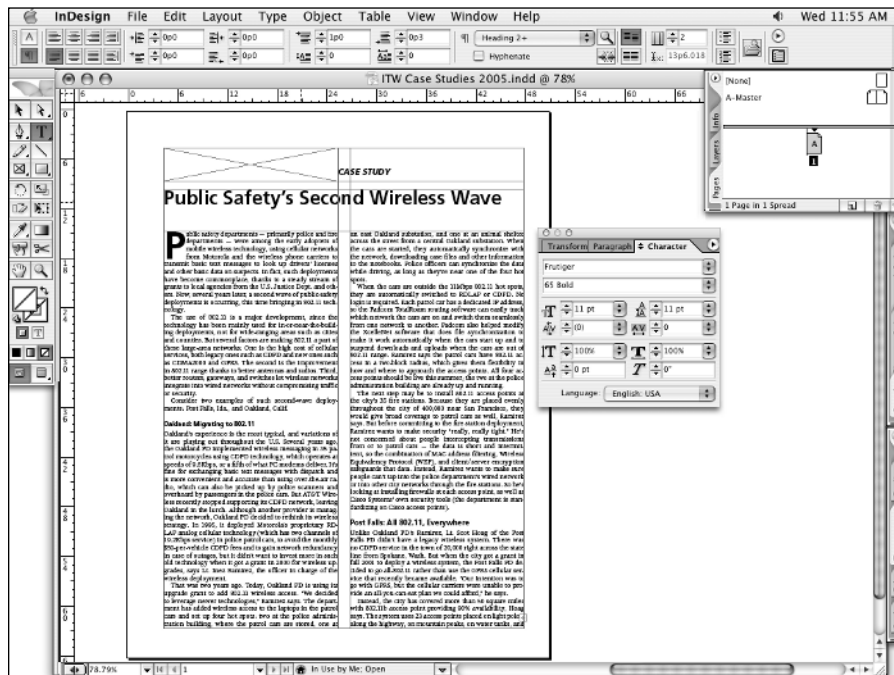

Figure QS-12: Your document should look something like this.

      b. Now, click anywhere in the regular story text with the Type tool, and then choose New Paragraph Style from the Paragraph Styles pane's palette menu. (Choose Type ⇨ Paragraph Styles, or press F11, to open the pane.) Provide a name at the top of the New Paragraph Style dialog box, and then verify the attributes in the Basic Character Formats, Indents and Spacing, Hyphenation, and Justification panes. (For the drop cap paragraph style, you'll also use the Drop Caps and Nested Styles pane; select the drop cap character style you created earlier in the Character Style pop-up menu.) Click OK when done. You should end up with one character style (it could be called Drop Cap) and five paragraph styles (they could be called Main Headline, Internal Headline, Body Text, Drop Cap Body Text, and First Body Text).

      c. Apply these styles to your text by clicking anywhere in a paragraph, and then clicking the appropriate name in the Paragraph Styles pane. To apply a character style (such as to the drop cap), select the appropriate text, and then click on the appropriate name in the Character Styles pane.

   9. Choose File ⇨ Save, or press ⌘+S or Ctrl+S to save your work.

Cross-Reference

For more information about typing, importing, and formatting text, see Part IV, "Text Fundamentals."

Working with Lines

You can create lines of any shape and size, and then change the style, width, and color. Here, I'm adding a line to the document's master page, so it appears on all pages. To work on a master page, double-click a master page icon in the Pages pane (Window ⇨ Pages or F12). Figure QS-13 shows the pane.
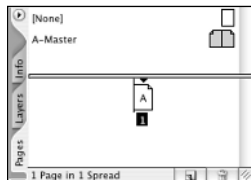
Figure QS-13: The Pages pane lets you work on master pages, as well as create new pages.

   1. Select the Line tool.

   2. Be sure the Stroke button in the Tools palette is set to black — click the button, open the Swatches pane (Window ⇨ Swatches or F6), and finally click the [Black] swatch.

   3. Position the mouse where you want to draw the line (below the master text frame for this example), and then click and drag to create a line, as shown in Figure QS-14. Press Shift while you drag to constrain the tool to drawing a horizontal or vertical line. The new line is selected, as indicated by the white handles. If the line becomes deselected in the following steps, click on it to select it.

   4. Precisely place and size the line using the Control palette, as follows: for the right page: X: 55p6, Y: 63p9, L: 43p6; for the left page: X: 3p, Y: 63p9, L: 43p6.
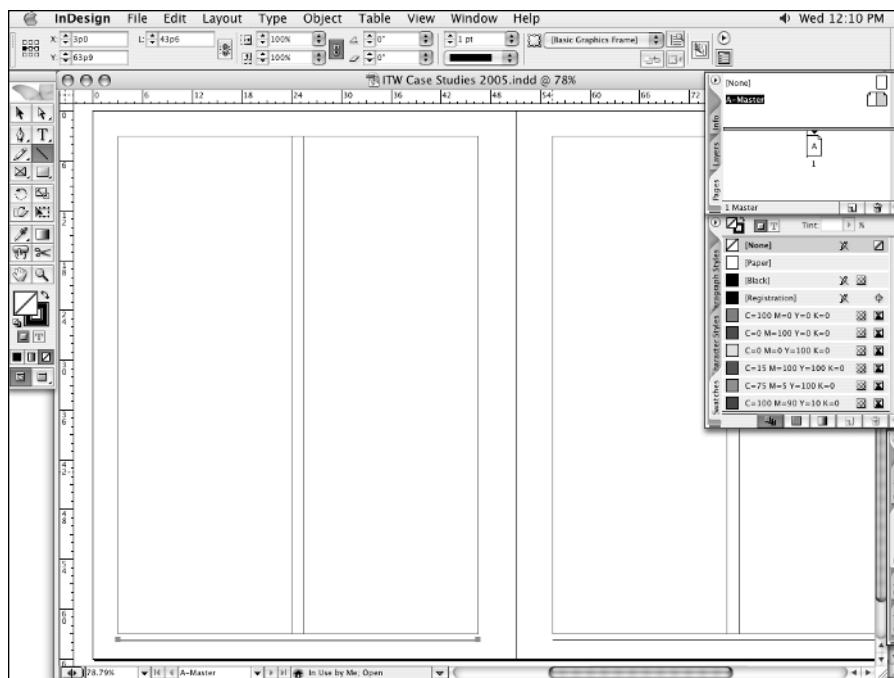
Figure QS-14: Use the Line tool to create lines at any angle.

5. **Make the stroke** 1 pt**, also in the Control palette.**

6. **Return to the story page you worked on previously by double-clicking its icon in the Pages pane.**

7. **Choose File ⇨ Save, or press ⌘+S or Ctrl+S, to save your work.**

Cross-Reference   For more information about working with lines, see Chapter 10.

Working with Graphics

In InDesign, any image that you import into a layout — whether it's a digital photograph, chart, or line drawing — is referred to as a graphic. Graphics go inside graphics frames — either one you create before you place a graphic, or one that InDesign creates automatically when you import a graphic when no frame is selected. Once a graphic is inside a frame, you can change its size and placement.

1. **Click and hold on the Rectangle Frame tool.**

2. **Position the pointer on the page, and then click and drag to create a rectangular graphic frame of any shape.** The new frame is selected, as indicated by the white handles. If the frame becomes deselected in the following steps, click on it to select it.

3. **To size the frame precisely, type the following values in the Control palette: X:** 22p8, **Y:** 30p8, **W:** 25p4, **H:** 25p4.

4. **To import a graphic, choose File ⇨ Place, or press ⌘+D or Ctrl+D.**

5. **Locate a graphic file such as a TIFF, JPEG, GIF, or EPS as shown in Figure QS-15; select it and click Open.**

6. **If necessary, click the graphic with the Direct Selection tool, and then highlight the Scale X Percentage field in the Control palette.** Type a new scale such as **80%**. This resizes the graphic while leaving the frame unchanged. (If you had used the Selection tool, this action would resize both the frame and its graphic.) The Scale Y Percentage field should change to the same value as long as the two fields are locked (a chain–button appears to their right; if the chain is open, click the button to lock the two fields).

Tip You can also resize the image to fit the frame by choosing Object ⇨ Fitting ⇨ Fit Content Proportionally (Option+Shift+⌘+E or Ctrl+Alt+Shift+E).

7. **Add a runaround to the image so text does not run to the image.** Choose Window ⇨ Text Wrap, or press Option+⌘+W or Ctrl+Alt+W, to get the pane shown in Figure QS-16. Select the graphic with the Selection tool and then click the Text Wrap pane's Wrap Around Bounding Box button (the second from the left), and set the wrap margins in the four fields (there's one for each side) to **0p6**.
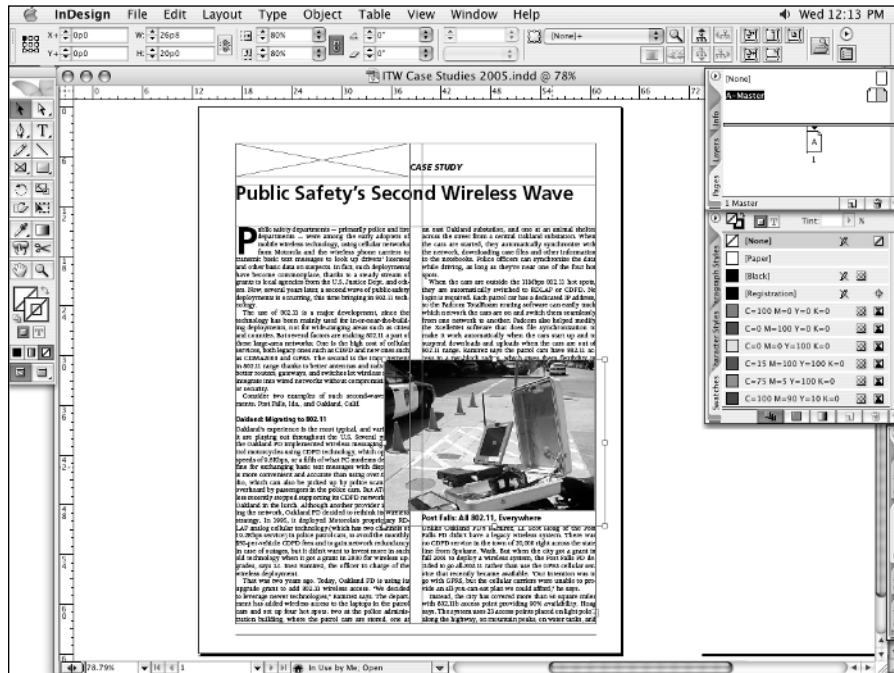

Figure QS-15: Choose File ⇨ Place, or press ⌘+D or Ctrl+D, to import graphics into frames.
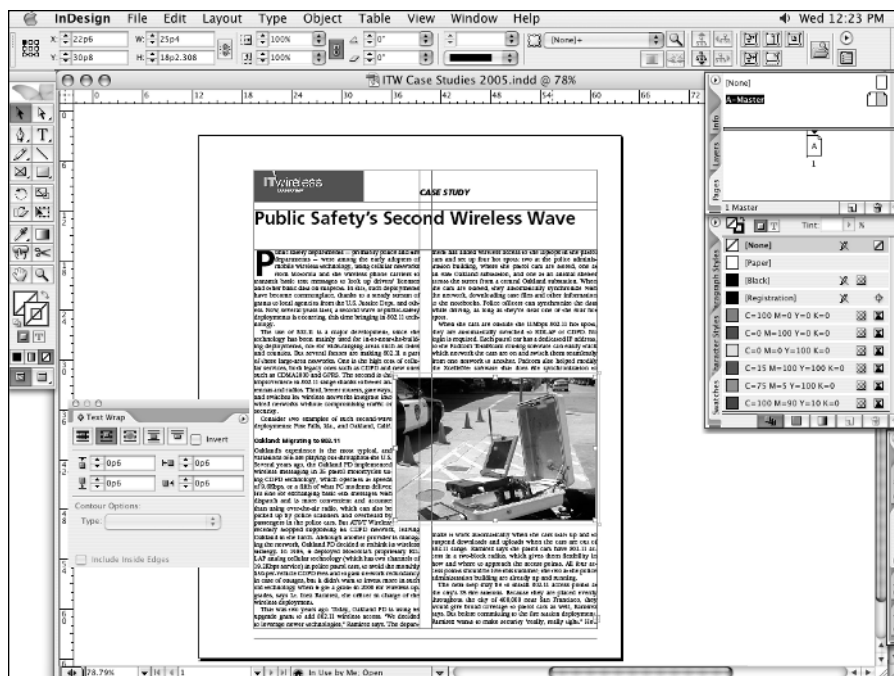
Figure QS-16: Set text wrap with the Text Wrap pane.

8. **Import a logo graphic for the first frame you created and size it to fit, as shown in Figure QS-16.** It doesn't have to fill the whole width of that frame.

Cross-Reference   For more information about working with graphics, see Part V, "Graphics Fundamentals."

Creating Colors

To apply the color you want to an item or text, first create that color. By default, InDesign provides a few colors: cyan, magenta, yellow, [Black], red, blue, green, [Paper] (white), [None], and [Registration]. (The names that InDesign puts in brackets are colors that cannot be deleted or modified.) In most cases, you'll be creating additional colors to suit your documents.

1. **Choose Window ➪ Swatches or press F5 to open the Swatches pane.** Here, you create, modify, and apply colors. You'll create a color based on a color in our imported logo.

2. **Select the Eyedropper tool, and then click on the background color in that logo.** For the *IT Wireless* magazine logo shown in Figure QS-16, the color is a medium blue.

3. **Choose New Color Swatch from the pane's palette menu.**

4. **From the Color Mode pop-up menu, choose CMYK.** This creates a color based on the four process colors widely used in commercial printing: cyan, magenta, yellow, and

black. Because you selected a color with the Eyedropper tool, the New Color Swatch dialog box shows the values, as seen in Figure QS-17. If you had not first selected a color with the Eyedropper tool, you would type values or click and drag the four sliders to select a desired color. If the Name with Color Value option is selected, InDesign names the color automatically; if it is not selected, you can give it a more memorable name such as Bright Navy.
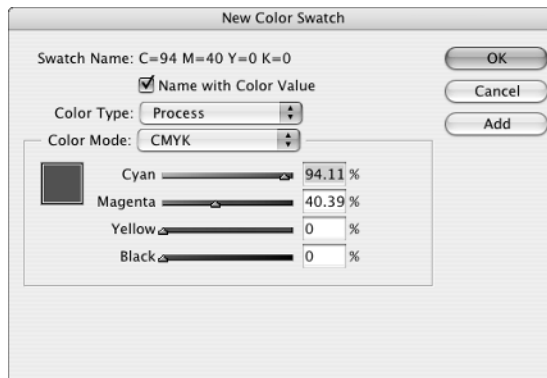

Figure QS-17: Create a CMYK color by first selecting a color from an object in the layout with the Eyedropper tool or by selecting the proportions of the constituent colors in the New Color Swatch dialog box.

5. **Click OK to create the color and close the dialog box.** If you want to create more colors, click Add. Click OK only when you want to close the dialog box.

Cross-Reference   For more information about creating colors, see Chapter 8.

Applying Colors

InDesign's Swatches pane, combined with the Tools palette, makes it easy to experiment with different colors. You can apply colors to frame backgrounds, lines, strokes, some imported images, and text.

1. **Be sure the Swatches pane is open (Window ⇨ Swatches or F5).**

2. **Click on the two frames at the top of the page with the Selection tool.** To select both, click one, and then Shift+click the other.

3. **Make sure the Fill button is selected in the Tools palette, as seen in Figure QS-18.** This tells InDesign what you want to color the object, not any strokes it may have.

4. **Click the name of the color you created in the previous section.** The selected frames will now fill with the color.

5. **Using the Type tool, highlight the text *CASE STUDY* in the upper-left frame.**
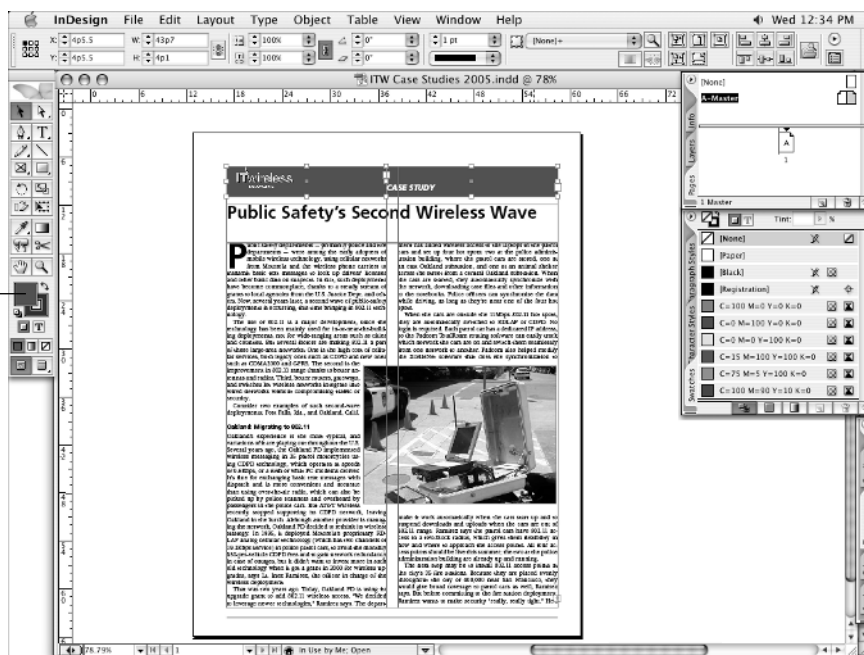
Fill icon

Figure QS-18: Click a color to apply it to the background of a frame.

6. **Again ensuring the Fill button is selected in the Tools palette, click the [Paper] color in the Swatches pane.** This makes the text white.

7. **Choose File ⇨ Save, or press ⌘+S or Ctrl+S, to save your work.**

Cross-Reference   For more information about applying colors, see Chapters 10 and 27.

Printing a Composite

Whether you're designing a document for black-and-white photocopying, color printing, professional printing, or even for PDF, you'll need to review drafts. By default, InDesign is set up to your system's default printer with just a few clicks.

1. **Choose File ⇨ Print, or press ⌘+P or Ctrl+P.**

Tip   If you press Return or Enter as soon as the Print dialog box appears, chances are that InDesign will print a usable draft on your laser printer. However, if you've selected a different page size, orientation, or other option, you may want to confirm the other settings.

2. **At the top of the dialog box, the Printer pop-up menu is usually set to your system's default printer.** You can leave this setting or locate and select the printer you're actually using. It's best to select your actual printer.

3. **Go to the Output pane and make sure the Color pop-up menu is set to Composite Grayscale if you're printing to a black-and-white laser printer and to Composite CMYK if you're printing to a color inkjet or laser printer.**

4. **Look at the page preview at the lower left of the dialog box and make sure the page (indicated by a light-gray rectangle) fits within the printer paper (indicated by a blue line), as shown in Figure QS-19.**
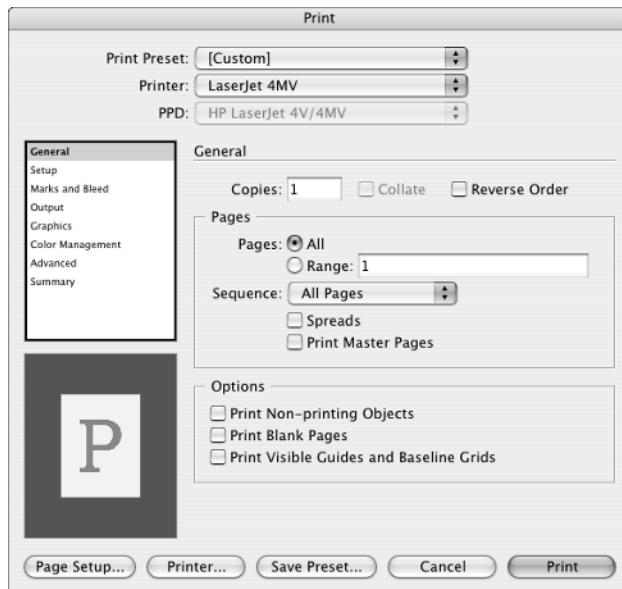

Figure QS-19: The Print dialog box lets you confirm that your document fits on the paper in the selected printer, as well as set the appropriate print settings for your document and target printer.

5. **Click Print.**

Cross-Reference

For more information about printing, see Part VI, "Output Fundamentals."

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