Chapter One
Planning Your Design

Planning a project is often the most fun and creative part of the design process. It is a time when you get to experiment and develop a range of possibilities for your design. It is also one of the most crucial times, in that the decisions you make here will affect the entire project. Once you have committed to a design approach, much of the rest of the design work involves applying that approach to the elements found within the design and fine-tuning the project's overall look.

With that in mind, you need a clear understanding of a project before you begin to design, no matter what format your project takes, be it a DVD cover, package design, brochure, or page layout. Since the designer's first priority is to communicate information in an attractive manner, understanding the content of the project will help you create a strong design that will effectively convey the project's message. In this section we explore how to initially plan and appropriately format your design so that it will be flexible and consistent. Most designers discover that when the overall plan for a design project is not thoroughly thought out, the chances are greater that the final design will fall short of their expectations. Conceptualization, research, thumbnailing, and formatting are all essential parts of the design process.

FORM AND FUNCTION

The most obvious facet of design is its visual aspects—the typefaces, images, and layout that make up a design's look and feel. It is these aspects that are most commonly associated with graphic design. These elements are also what initially attracts the reader's attention. One sometimes overlooked aspect of design is function, the design's ability to fulfill its intended purpose. Function is the driving force in any design project. The true measure of a design's success is


THE WIDE WORLD OF PRINT One of the great aspects of designing print projects is the many formats they can take, from traditional layouts such as for magazines to three-dimensional formats found in package design. Brochures, menus, and CDs all provide the opportunity to work with unconventional shapes, die-cuts, and folds.

Layout Variations: Standard and Custom Formats

Because these projects contain folded multiple pages, the layout must work with the 3D form.
Projects such as CD booklets and brochures can take many forms.

CD Booklets

Gatefold   Single Fold   Booklet   Gatefold with booklet   Accordion Fold
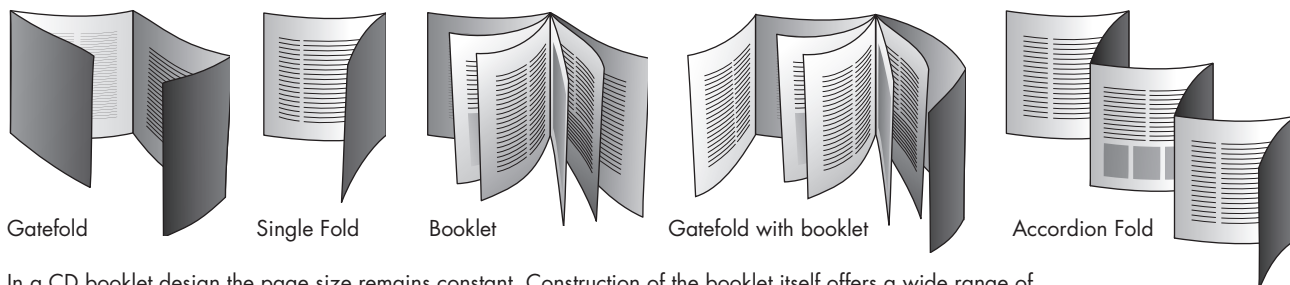
In a CD booklet design the page size remains constant. Construction of the booklet itself offers a wide range of variations. One pitfall of this format is its small page size. It can be a challenge to accommodate large amounts of text, such as lyrics. This set of samples incorporates combinations of folds and booklets.

Brochures

Single Fold   Right Angle with Short Fold   Barrel Fold   Z Fold   Gatefold   Letter Fold
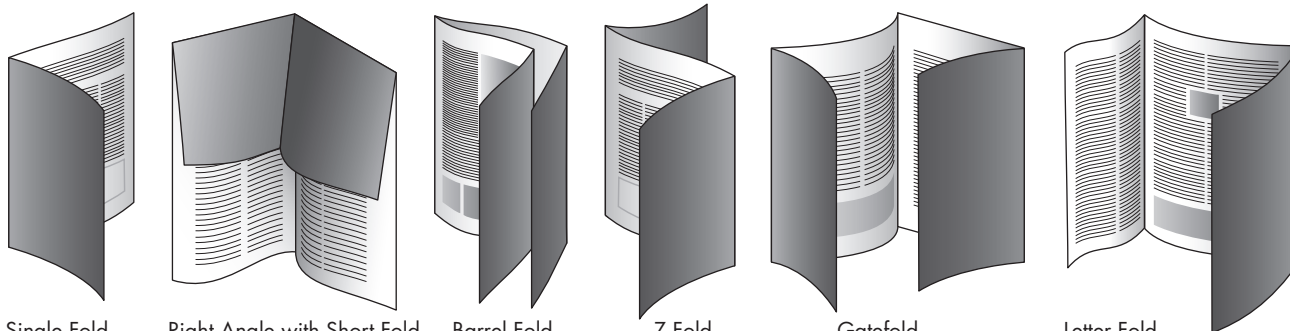
Unlike CD booklets, a brochure's page size can vary greatly. It can be folded in simple or complex ways. Remember when building your mechanical to trim inside folding pages slightly so that they fold comfortably.

Custom Formats

Building upon and customizing standard formats can bring a uniqueness to a design. They can also require building more elaborate and complicated mechanicals.

CURVILINEAR FORMATS
When overlapping shapes are positioned properly they can be used to create pockets. Here a series of semi-circular shapes fold in on each other to create the package.

CD BOX SETS often include expanded materials and have sizable production budgets, providing the opportunity to experiment with alternative formats. In this example a digipak format accommodates a booklet and multiple CDs.

CUSTOM FORMATS Combining shapes to build more complex forms is a method that is effective and easy to understand. Here a series of ellipses were combined in Illustrator to create the cloud like shape that serves as the overall format for the brochure.

CREATING POCKETS Depending on the project's content, it is not uncommon for a design to require a pocket, and there are many ways to incorporate them into a design. Here a custom envelope is designed to fit in the pocket.

CUSTOMIZING STANDARD FORMATS One way to approach creating a unique design is to start by basing it on a pre-existing standard format. Here a standard gatefold acts as the basis for the unique brochure format.

NEW MATERIALS, NEW SOLUTIONS
There are numerous design flaws in the standard CD jewel case format, such as broken cases, broken disk mounts, or that the booklet doesn't fit easily into the jewel case. Here an alternative version uses a plastic acetate pocket with a swivel, allowing for easy access to both the CD and the booklet.
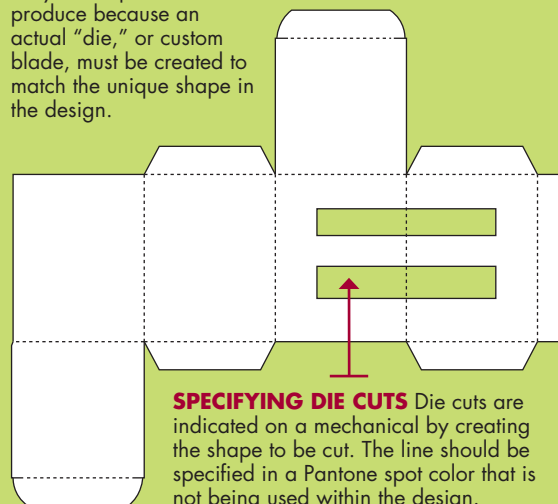
BUILDING PROTOTYPES Creating custom packaging requires a high level of expertise, both in the building of the mechanical and in the ability to construct a prototype that accurately reflects the final design. Here the prototype is constructed out of illustration board.

Building Mechanicals

Once you've figured out the format your project will take, you need to build the mechanical. The mechanical needs to be built precisely so that the printer will know how to trim, fold, or perforate your design.

FOLD MARKS are used if the project needs to be folded, scored, or perforated. Fold marks are designated by a dotted line.

SAFETY MARGINS are sometimes used to designate the limits of where type can be placed. The line is in a spot color so that this information is output on a separate plate. Placing your type within these boundaries will ensure that the type does not get cropped off.

REGISTRATION MARKS are used to align the color plates accurately.

CROP MARKS designate trim size of the page, and where the paper will be cut.

DIE CUTS are a great way to show the boxed product and to add interest to the overall design. They are expensive to produce because an actual "die," or custom blade, must be created to match the unique shape in the design.

IMAGE BLEED If you have images that bleed off the page, you should allow some of the image area to run off the page edge so that when it is trimmed your image will fully bleed off the page. This leaves room for error if the page is trimmed improperly.

SPECIFYING DIE CUTS Die cuts are indicated on a mechanical by creating the shape to be cut. The line should be specified in a Pantone spot color that is not being used within the design.

how well it satisfies the project's formal and functional demands. Great design is the product of strong aesthetic, conceptual, and technical skills. The first step in beginning any project is to start by conceptualizing the project to find an appropriate theme or metaphor for the design.

Conceptualizing a project is easiest when you have a clear understanding of the design's purpose. The fundamental mission of design, as with any art form, is to communicate. That communication may have different purposes: to persuade, to evoke a response, or to provide information. The designer's role is to find a way to effectively convey that message. In order for design-

ers to do this, they must have a clear grasp of the project's intended purpose. This is achieved through clear communication between the designer and the client. These discussions should cover all aspects of the design, from conceptual issues to production and budget concerns. Understanding the breadth of a project and taking all the issues into account will help you to better visualize the form your design should take.

This chapter will introduce you to numerous ways to approach your design. Many designers find that starting a project is often the hardest part and that once they actually begin to design, the process gets easier. The
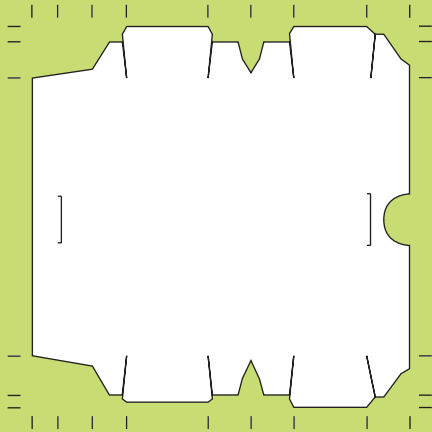
PACKAGE DESIGN

Creating accurate mechanicals for complex packages is a more complicated task than setting up page documents because they involve elaborate shapes and folds. Depending on the shape of the package, you may want to use different software to create the mechanical. In the example above, the mechanical was created in InDesign. To create the more complex shapes such as those found in the clamshell design below, Adobe Illustrator was used because of its stronger illustration capabilities. A great way to understand how package design works is to disassemble an existing package to see it in its original flat form.
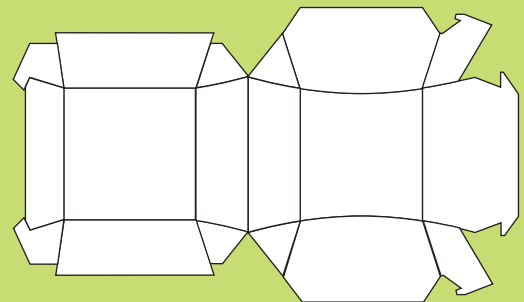
COMPLEX CLAMSHELL PACKAGES

Clamshell formats present a unique set of problems for the designer to solve. These include interlocking curvilinear shapes. Developing original prototypes means building and refining numerous prototypes to ensure the top and bottom shells align and lock together. The mechanical above was created in Illustrator. Since the design is generally symmetrical, a good approach is to create one half of the design and then copy and reflect the shapes.

hardest part for many artists is putting down the first stroke. The samples provided in this chapter should help you jump-start your own projects. There are always a number of design solutions for any given project. Understanding this will make you a more versatile designer and help you cope when a design changes, either because the design demands it or because the client does. Magazine layouts are often changed to accommodate the last-minute sale of an advertisement or a late-breaking news story. While it is always preferable not to have to rework a design, the bottom line is that those recently sold advertisements that your design must

now accommodate are helping to pay your salary. Being versatile, patient, and amenable to change are helpful characteristics for a designer who works with deadlines and whose designs are subject to change.

TYPE, IMAGE, AND COMPOSITION

Designers have many means of getting a message across through their designs. The most common vehicles used to communicate are type and image. Using words is often the most concise way to make a point because language is the most direct form of communication. Photos also can be used, and the right image

can often have more visual impact while communicating a literal meaning almost as clearly as type does. The image you choose, the way in which you use it, and how it interacts with your type are integral to the design's ability to communicate. There are also other subtle ways of composing a design to engage a reader's attention. By placing emphasis on the appropriate elements, a designer can control the composition's focal point, set up a visual hierarchy between the design elements, and in the process help direct the reader's eye. Using these methods, a designer can also control the visual pacing of the piece. Each project requires the designer to address questions regarding the role of type, image, and composition in communicating the project's message.

A WORD ABOUT WORDS

While designers often depend on copy writers to supply them with a project's text, it is not uncommon for designers to contribute to the writing of a project, as words are always directly related in some way to visuals. Meetings between art and editorial staffs are often collaborative efforts where writers and graphic designers work together to develop their articles. In the process it is not uncommon for writers to contribute visual ideas or for graphic designers to suggest possible headlines. Having strong verbal and conceptual skills is a plus for any designer, and there are methods and aids you can use to enhance these skills.

Words often help to stimulate visual ideas, and one way to begin a project is by playing with words. Start by writing a list of words that relate to the project's focus. If a project needs a tag line, consider catchy phrases, puns, or plays on words. Popular song and movie titles are a great resource

for headlines, titles, and tag lines because they are shared by the common culture and their references are widely understood. Start with the dictionary and a thesaurus. Look up words you already know. Sometimes just reading the words used to define it will spark an idea. A word's secondary definitions can also provide food for thought. It is not uncommon for copy writers to make use of reference materials to help them synthesize words. There are a wide range of writing aids available: phrase finders and books of idioms, quotations, slang terms, rhymes, antonyms, and synonyms can be found in the reference section of your local bookstore or library or at an online site.

Developing a Working Grid

An initial step in designing multiple-page projects is to create a working grid. A wide range of grids can be used for different functions.

Two-column format

Three-column format

Four-column format

Five-column format

Page size determines the column format. Five- and six-column formats work best on larger pages. The smaller the page size, the fewer columns it can accommodate. Too many columns can create narrow text widths and awkwardly set body copy.

It was a new day. There was an interest at the time in a new brand of thinking, a different approach. While many rejected these new ideas, a rising majority was ready to consider something other than the status quo, something that better addressed their needs.

Here flush-left text reduces large spaces between words.

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Justified alignment creates awkward spacing.

NARROW COLUMNS Column width and type size directly affect each other. Narrow columns are liable to cause the body copy to break awkwardly and create uneven word spacing, especially when its paragraph text alignment is set justified. Because justified text settings force the alignment of the type to both the right and left margins, large gaps can occur between the words. Note the even letterspacing of the text on the left, which is set aligned left, as opposed to the justified type on the right.

DEVELOPING CONCEPTUAL VISUALS

Along with a list of associated words and phrases, create a list of visual ideas of related objects and images. Drawing analogies or making references through the use of metaphor and symbol is a common design approach. Well-known stories and shared cultural references are great vehicles for making a point. For example, magazine articles on the Kennedy administration will often use Camelot and King Arthur's Round Table as a theme to convey the grace and ideology of the period. For another example, let's say you are designing a project whose purpose is to emphasize the multiple features of a particular device. Here you might consider using an image of a juggler, an octopus, or a Swiss Army knife, all images that can act as a metaphor for versatility and an ability to handle many tasks.

A couple of suggestions regarding project conceptualization: Don't be afraid to include an idea that you think may be weak. You, or a collaborator, may later see it in a different light and it could spur an idea. You never know where a good idea will come from. Try making it a practice to write down your ideas when they come. Nothing is more frustrating than forgetting a good idea, and it often is the case that ideas are fleeting. Another method of preparing a design is to look at how other designers have handled similar material.

Margins and Gutters

Margins are the space between the page edge and the text columns. Margins can be set equally or unevenly depending on the page orientation.
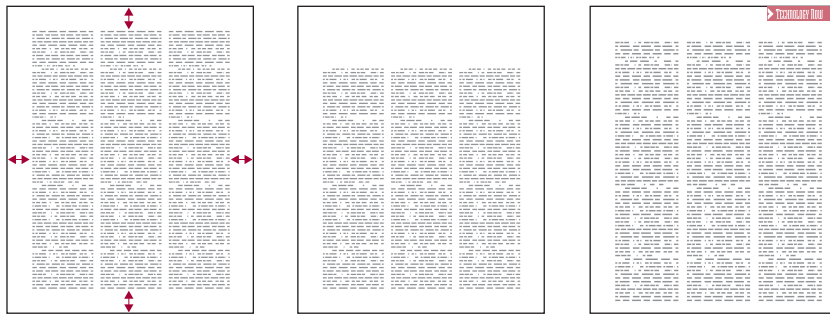
The margins are set evenly in the example at far left, unevenly in the other two. Uneven margins in the middle example allow for more white space and give an openness to the design. The example on the far right, designed to be a right-hand page, provides additional space in the gutter of the facing pages, as well including space at the top for a section head.

Grid Variations

Grids are not required to have equal column widths and margins. Using unconventional grid formats can be an effective way of creating interesting page layouts.


A   **B**   **C**   **D**
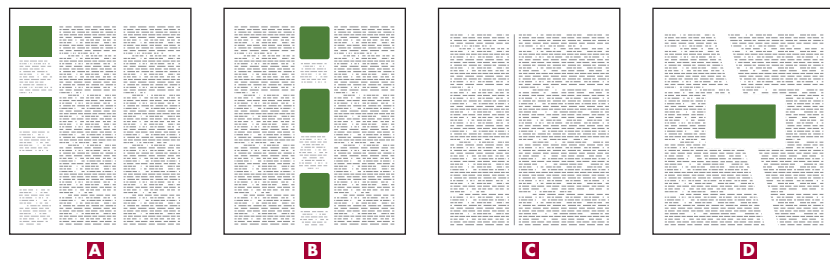
In A and B the grids are designed using a narrower column that could accommodate support material such as a timeline or glossary with imagery.

Uneven columns in C break up the page asymmetrically. The diagonal direction of the column gutter in D is a less conventional but effective layout method.

Page Gutters
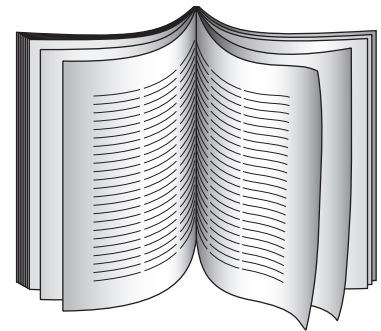
Magazines often design additional margin space so that text doesn't get lost in the gutter created by the magazine spine. How much this affects the page depends on the number of pages in the magazine and the way it is bound.
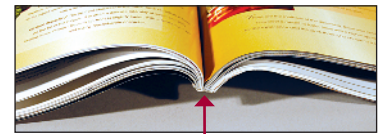
PERFECT BOUND Perfect bound magazines have a flat spine and depending on the issue's thickness may not lie flat when open.

SADDLE STITCH This binding method uses staples in the page gutter, allowing the page to open flat. Losing type in the gutter is less of an issue with this method.

The better you understand the material, the more likely you are to handle it successfully. Approach your project from as many angles as possible before you make any concrete decisions about its final form.

SELECTING TYPEFACES

One of the things you'll need to do when you're beginning the design process is to start looking for typefaces that will properly convey the subject material of the project. Designers today have a wealth of typefaces to select from and many ways to conduct their searches. Begin by typing out the words that will appear in the large dominant headlines or logotypes and then copying it numerous times. Then highlight each set of words and style each sample in a different typeface. Also try styling these words in a range of styles, such as upper and lower case, all caps, and small caps. Each of the approaches creates different effects. Another way that you can view your headline in a range of typefaces quickly is to make use of a type management program such as FontBook or Linotype FontExplorer to see the variations. Most of these programs will allow you to enter in a sample selection of type and then scroll through the active typefaces to see the headline in a range of faces.

Perhaps the biggest decision you'll make when narrowing down your typeface choices is whether to use a serif or sans serif typeface. Almost all fonts fall into one of these two categories. If you're looking to convey a modern feel you might start by exploring sans serif typefaces, which by their nature have a more modern feel than serif typefaces. If your project needs to project an older, more established feel, a serif font might work best. If it's an edgy contemporary feel you need, you could try experimenting

with more old-school methods, such as creating distressed type by manipulating it using a photocopier.

TYPE RESOURCES

Another approach to searching for typefaces is to use other resources such as specialty type websites or publishing sites such as Dover Publications, which offers collections of retro typefaces that have been converted into vector formats for use on the computer. There are many online resources available to designers that offer both contemporary and traditional typefaces. While some of these sites will allow you to download the type fonts for free, there are a few things to keep in mind when using free fonts. Generally the fonts available for

Placing Elements within the Grid

Basing a design upon a grid system is a common aproach, one that requires an understanding of the layout possibilties made available by the grid.

Single Pages

The simplest way of using a grid is to place the design elements in perfect alignment with columns, letting the column format determine the object's dimensions.

BLEEDS The image on the top left "bleeds" off the edge of the page. This helps vary the grid.
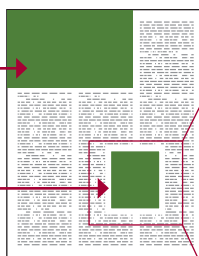
SUBDIVISION Another way to expand the grid is to subdivide it by having the object straddle the columns.

Four- and five-column formats are more diverse compositionally but also have pitfalls. Thinner columns make it harder to subdivide the grid and still maintain readability.

The same element straddles three columns in a way that doesn't create narrow column widths. This placement breaks up the grid and enhances the composition.

Corners are a natural position for placement of design elements.

Avoid placing your elements in positions that create small blocks of text that force the reader's eye to jump around.

Objects are always placed in logical relationships to each other, no matter how few elements are included in a design. Formats that involve multiple ■ pages will ■ invariably require a working grid. These ■ formats include magazines, brochures, CD booklets, and even Web sites. The grid system maintains a consistent look and feel from page to page. While it's easy to see the similarity of color used throughout a design, the consistency in the placement of elements in relationship to each other from page to page is much more subtle. If you consistently handle your elements in terms of spacing and placement on the page, this subtlety will be conveyed and each page will feel like it belongs to an overall

Elements straddling columns should be placed evenly between the columns. Make sure that the surrounding type wrapping around the image is set wide enough to avoid awkward spaces in the text.

The placement of the element above subdivides the grid format awkwardly, creating extremely narrow column widths on both sides of the element.

free are of a low quality in that they don't offer a range of styles and weights, or have an incomplete character set. Often the character outlines found in these fonts don't have the subtlety and hinting of higher quality typefaces that you usually have to pay for. While you may find a free downloadable font that perfectly fits your project's needs, traditional type houses such as Adobe and ITC produce consistent, finely designed, and well-rendered typefaces that are well worth purchasing.

GATHERING IMAGERY

Many professional designers have a budget that allows them to contract photographers and illustrators to create artwork specifically for their projects. Student designers don't have the luxury of commissioning original artwork, so they need to search elsewhere for their imagery. Let's discuss a few ways of collecting resources and creating artwork for your designs.

The rise of stock photography over the last ten years has provided students with a means of designing with photographs without resorting to scanning previously printed material or using their own photographs. Most stock house websites provide libraries of images that designers can use to create their initial designs. While these images contain embedded watermarks that cannot be removed, the files are high-resolution and perfect for prototype designs. The watermarks are purposely unobtrusive, as the stock house is hoping that

Facing Pages and Spreads

Splitting up image and text on facing pages is common. But without elements that help to integrate the two pages, the overall effect may be of two separate pages rather than one integrated design.

Overall effect is that of two vertical pages rather than one larger horizontal page.

Running the image across four columns is one way of integrating the two pages into the design, helping the reader see the design as one composition rather than two facing pages.

Two page spreads can comfortably accommodate large images.

Running elements across the spread can be an effective way to make both pages interact with each other. Note that the image's depth doesn't perfectly divide the page, creating an unequally balanced (and more interesting) composition.

This composition creates the feel of one horizontal page.

Positioning the image in the upper right and having it bleed off two of the page edges gives the impression that the image continues outside the frame of reference, creating a sense of implied space.

This page composition leads the reader's eye up and to the left.

The placement of the element helps draw the reader's eye into the center of the page. Images that run across the gutter should be cropped or positioned so that no pertinent information gets lost between the pages in the gutter.

Placement of image leads the reader's eye into the center of the composition.

The relationship of these elements creates a sense of balance. Because of this positioning the two elements seem connected by similarity in size and positioning and yet stand in opposition.

Pushing images to the outer edges of the composition makes the type the focal point.

once you get the client's approval on a project you will then purchase the image and the rights to use it. There are also a number of royalty-free stock photography sites that will allow you to download high-resolution images either for free or for a nominal fee.

Along with stock photography there are collections of images in the public domain that can be used free of charge. They provide a great source for a variety of nostalgic imagery. These diverse collections might range from a series of etchings of Victorian dress to Art Nouveau motifs and borders. Dover Publications offers a wide range of inexpensive resource collections (see Index). These images are generally of a higher quality than many of the royalty-

Getting Ideas and Gathering Imagery

Scanning 3D objects and textural images is a great way to create original art. In essence you are using the scanner as a camera. Here's a look at some different ways to incorporate these methods into your design.
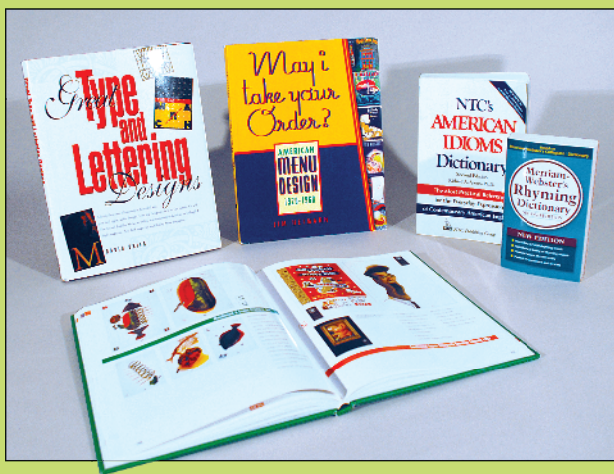
GET INSPIRED Books can be a great resource for helping form design approaches and concepts. There's a wealth of design books that can help give you ideas for typography, style, and color palettes. Experimenting with words can also help spur ideas, and thesauruses and books of idioms are useful tools for copy writers.
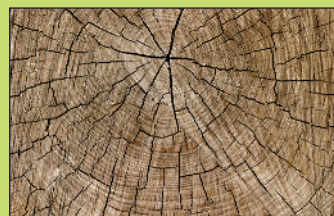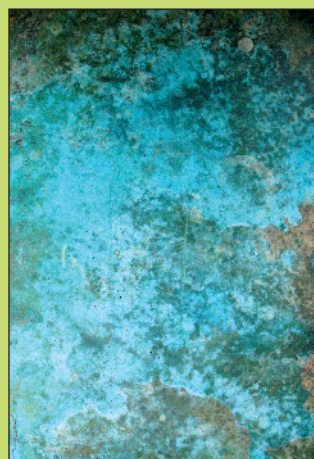
CONSIDER TEXTURE Depending on the project, you might want to consider using a texture that relates to the subject content. There are many ways to get textures. Try using a scanner or camera to capture custom textures. There are also many websites where you can download high-resolution, high-quality textures such as lostandtaken.com.

Background paper stock was scanned in and placed into the layout.

PAPER STOCKS Print designers have many different types and weights of paper stocks available to them. Papers can either be used for printing on an offset press, or they can be scanned in and then used as a background texture to give the impression that they are printed on a custom paper stock.
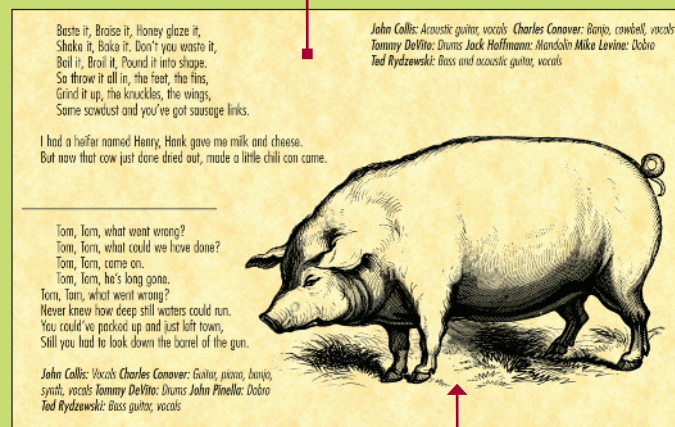
HISTORICAL IMAGERY In this sample the image of the pig is from a royalty-free, vector art collection. Collections of line art illustrations like this can be useful in bringing an authentic feel to a design. Dover Publications has a large library of historical artwork.

free clip art collections available. While the use of clip art has traditionally not been highly regarded among designers, there are an increasing number of websites offering high-quality vector images. I would still recommend avoiding the use of clip art as it tends to be generic and rarely matches the content of your project in a very specific manner.

Other methods of getting visual materials include using your own artwork or scanning resource materials. If you have strong illustrative or photographic skills, you should certainly incorporate them into your work. But there are other methods that you can employ, such as scanning in textures and three-dimensional objects. Scanning materials for textures is an effective way of creating interesting backgrounds. For a university website, for example, the designer scanned in a series of art tools to represent the different areas within the art department. A similar approach could be applied to a brochure design for a music school. There are many flat and three-dimensional objects that can be scanned and used as textures or images. Related items such as sheet music, guitar picks, and instrument strings can be placed directly on the scanner and then with some manipulation be suitable to design with. When you scan three-dimensional objects in this way you are essentially using the scanner as a camera.

There are many reference materials that designers use to indirectly influence their designs, such as design books and magazines. Most designers collect books on a wide range of design schools and styles, and these are especially useful when you need to capture the feel of a particular period. For example, you might consult a collection of menu designs from the 1950s for a design that requires a retro feel. These kinds of books can provide a sense of the typography, color, shapes, and motifs reminiscent of a period.

As a general rule, collecting more visuals than a project requires will provide you with more options. The time to experiment with a design's pos-
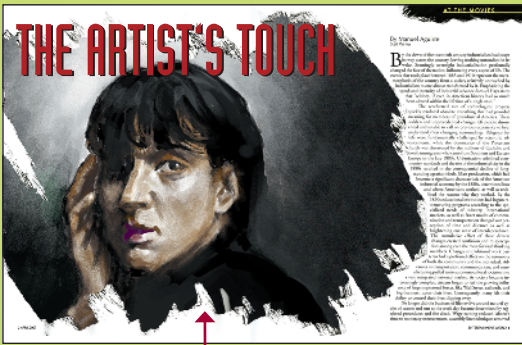
In this design a large swatch of black ink is painted and then scanned. The image is then placed into the shape.

ORIGINAL ART Some techniques can't be easily recreated on the computer. Try traditional media such as pen and ink and watercolors to create images.
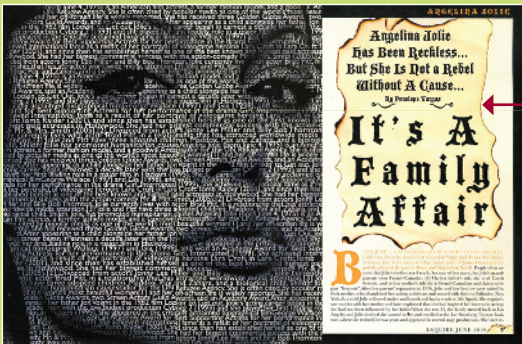
COMBINATIONS Some of these traditional techniques can be combined to create original designs. Here a piece of parchment paper is torn to fit within the space in the layout and then the edges are burned. The burned paper is then scanned and silhouetted in Photoshop and placed into the design with a drop shadow applied to give it a sense of depth.

DROP SHADOWS To give the impression that the silhouetted objects are actually sitting on the page naturally, you can apply soft drop shadows to them.

PHOTOGRAPHING 3D OBJECTS allows the designer to fully control the image so that it fits comfortably into a design. Images like the one above have shapes that allow type to be wrapped around them.

Sketching Out a Game Plan: Thumbnailing

Thumbnail sketches are a prerequisite for planning any design project. They help to develop a plan for all the elements within a project and give an overall blueprint of the look and feel of a design.

Before you begin to actually build your layout and focus on the specific elements that make up a design, you need to create a master plan for the project. The easiest and most direct way to do this is to sketch out by hand a rough drawing or "thumbnail" of the layout. The more complete you make the plan, including as many specifics as possible, the easier it will be when you are designing the pages. This ensures that you haven't left out any integral elements before you begin and gives you a preview of the overall layout.
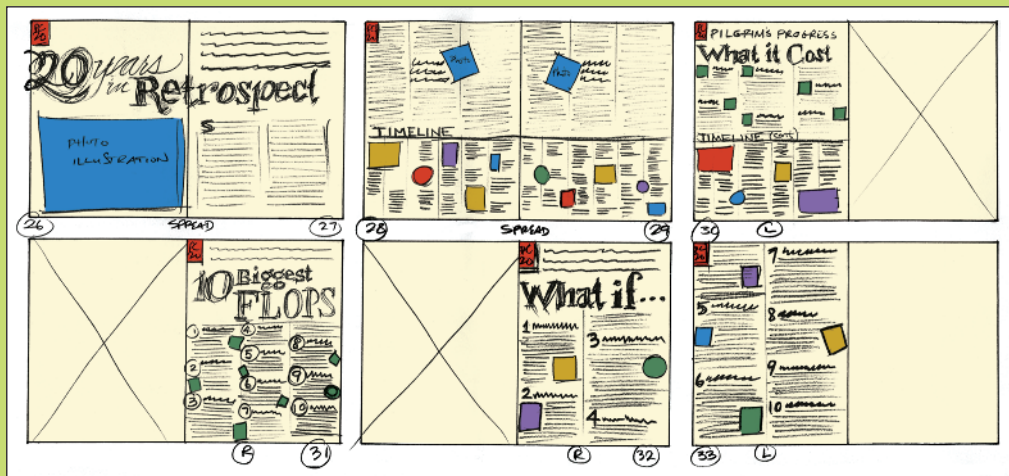
THE DRAWING BOARD This thumbnail layout for a magazine article includes all of its elements in great detail, as well as addressing page orientation. It's a great way to get a sense of the article's pacing.

sibilities is in this initial stage. If you begin with only a few images, you may be forced to make them work, and chances are they won't. Occasionally you may find the perfect image right at the start of a project, but this is the exception, not the rule.

CREATING A GAME PLAN

Once you have done your research and gathered appropriate reference materials, you can begin to sketch out the design. Sketching, even in a rough state, is integral to developing your layout. With the introduction of the computer to design, this initial stage is becoming increasingly overlooked. Sketching is always worth the small amount of time that it requires. Creating a small "thumbnail" sketch provides you with the opportunity to solve many of the basic challenges posed by a design before you actually begin to build it. By including all of the fundamental elements within your thumbnails, you will have a well-thought-out plan for your design. The more complete the thumbnail is, the less likely you will be to overlook an element and then have to readjust your layout later.

FORMATTING THE PROJECT

Once you have come up with a working concept or theme for the project and have created a thumbnail, you can begin to build the structure of the design. If your project involves multiple pages, you will need to start by creating a page format.

CUSTOM PAGE FORMATS

The grid is a commonly used device that acts as the underlying structure of a design. The most obvious example of a grid system is text columns. The first thing you do when you create a new InDesign document is define the vertical grid of columns and the page margins. The parameters that you set here will affect your entire design, as all of the elements will be placed in relationship to these column guides and margins. Think of the grid not as a constraining limitation, but rather as a means to make sense of and bring order to a design, a device that helps you maintain consistency throughout your project. Grid systems can take numerous forms, and designers employ them in a variety of ways to produce interesting compositions. One common method is to subdivide the grid. An example of this would be to set up a six-column grid for a page that contains three columns of text. This allows the designer to use half-column increments, thus adding versatility to the design and helping break up the rigidness of a strict grid.

SETTING UP THE VERTICAL GRID

There are a few things that will determine the number of columns that can be used. The most important of these is the page size of the project. Generally, the smaller the page size, the fewer the columns that can be accommodated. For example, a standard-size magazine like *Time* or *Esquire* can comfortably

accommodate a three- or four-column format, whereas a magazine with a larger format can be designed with five or six columns. The smaller format can't accommodate five or six columns because the columns would be too narrow to properly set paragraph text. Column width is essential to type readability, and when a column gets too thin, the body copy tends to break awkwardly.

Column width and type size directly affect each other. The size of the paragraph text and the typeface used play a role in determining column width. For instance, while a one-inch column width might be fine if you are using a condensed version of Futura set at 8/9, the same column width will not accommodate text set in 13/14 Times Roman. Like type size, the alignment of the text also determines how type appears in narrow columns, especially when the type is justified. Narrowly set justified text doesn't work well because it forces alignment on both right and left margins, causing large gaps between the words. This can be fixed by adjusting hyphenation settings, inserting soft returns, forcing word breaks, and writing to fit, but this is laborious work that might all have to be redone should any late copyediting or text changes be made. A simpler way to fix this would be to change the alignment to flush left, which will reduce awkward spacing and uneven type breaks.

MARGINS AND GUTTERS

Along with setting the number of columns on your page, you will also control the positioning of these columns by setting the margins and gutters. Gutters can refer to the space between the columns and also to the space between two pages when they face each other. Margins are the outer area surrounding your columns. Large margins give a sense of space and openness to a design, but they also reduce the amount of space that is allotted for columns and consequently affect how much type can fit on a page. If your design is text-intensive, your margins will need to be smaller. Margins can be set centered and evenly spaced or can be set to allow unequal space around the columns. One thing to consider when setting up margins is the page orientation. If the pages will face one another, then a gutter will form within the spine where the two pages meet. Depending on the type of binding used and the number of pages in the project, the designer may consider allotting additional space to the inside margins so that type does not get lost in the page gutter.

THE HORIZONTAL GRID: BASELINES

The baseline grid is an unsung hero of multiple-page design. It quietly sits below the surface, less obvious than the column grid but equally important, as it ensures the cross-alignment of body copy. The baseline grid should be used for any project that has linked columns of text running throughout its pages. The most important reason to use a baseline grid is to ensure that your column text cross-aligns. Cross-alignment refers to the alignment of text in adjacent columns. When paragraph text does not cross-align, it has a sloppy and nervous look.

Setting up the baseline grid is essentially a three-step process. First you need to set up your text leading. Then set the increment of your baseline grid to match your leading. This can be done by adjusting the InDesign document preferences for grids. The last step is to select the text and make it snap to the grid. This setting can be found in Paragraph section of the Control palette running across the top of the file. Just as all the elements sit in relation to the column grid, all running body copy and images will align in a relationship to the baseline grid. Once you've set your margins, columns, and gutter widths and created a baseline grid, you essentially have a grid of vertical and horizontal guides that will help you place your elements in precise and consistent relationships to each other.

MAINTAINING CONSISTENCY

The degree to which you rely on a grid system will depend on the project. A poster design that doesn't require columns of text will depend less on a strict grid than a page from a magazine. But even in the simplest of designs there is usually some sort of measurement system in place. Objects are always placed in logical relationship to each other, no matter how few elements are included in a design.

Formats that involve multiple pages will invariably require a working grid. These formats include magazines, brochures, CD booklets, and even websites. The grid system maintains a consistent look and feel from page to page. While it's easy to see the similarity of color used throughout a design, the consistency in the placement of elements in relationship to each other from page to page is much more subtle. If you consistently handle your elements in terms of spacing and placement on the page, this subtlety will be conveyed and each page will feel like it belongs to an overall design. This consistency involves more than simply placing elements uniformly on the baseline

grid. A strong, consistent design will handle all the smaller details, such as runaround distance, paragraph indents, and holding rules, in a similar manner.

MASTER FILES AND TEMPLATES

All magazines rely on a style book that outlines the standard styling and placement for every element that regularly appears on the pages of the magazine. The style book includes type and color specifications as well as positioning instructions and advertisement configurations. It ensures consistency not only within a single issue of a magazine, but also from issue to issue. Another useful technique that will help you manage a project is to set up a system of master templates. These types of files can be applied to any design project. Depending on your needs, templates can be set up in InDesign, Illustrator, or Photoshop.

A Photoshop master file would contain all the relevant layers and paths. These files might be used when you want to make sure the position of elements is consistent throughout a design's pages. This technique is commonly used by web designers who use Photoshop

Exhaust the Possibilities: Creating Design Variations

Whether you're beginning to design a logo, type treatment, or page design, it's best to try numerous design approaches and explore a range of variations. This allows you to visualize many possible approaches before committing to a final design.

One of the great aspects of designing electronically is that it's so easy to create different variations of a design. One way to work up design variations is to build upon your ideas as you are creating them by copying them and applying a range of techniques to them.

CONSIDER THE OPTIONS
No matter the type of design project, consider how each aspect and element within a design can be handled. This include the shapes, color palette, typography, and layout.

CLIENT PRESENTATIONS
This approach of creating variations is particularly useful when faced with presenting your work to potential clients. It's always best to give your client a range of possibilities. Too many variations can confuse a client, so narrow down your favorites to four or five versions before presenting them.

DON'T FALL IN LOVE
too quickly with your first attempts at a design. If you're satisfied too easily, you're less likely to really explore all the possibilities and understand the opportunities that may be made available by a project. Usually it takes a number of approaches and decisions before a design really starts to take shape.

LOGO VARIATIONS While the logotype is being developed, try applying different color palettes.

IMAGE VARIATIONS In this sample the concept was to superimpose a logo onto a musical instrument or related object. The image compositing is done by using Smart Vector Objects and layers in Photoshop.

to build initial page designs. While each webpage on the site may contain different content, the positioning of fundamental elements that appear on every page, such as navigation buttons, will remain the same. Essentially, the master file contains all the layers for the entire site, and it is from this file that all the separate pages originate. While there will inevitably be some pages that break standard format, this system will allow your site to have an integrated feel.

An Illustrator master page might contain a logo file that will appear within your layout. Logo files must remain consistent, and companies go to great lengths to make sure their logo, and hence their corporate image, is presented in a consistent manner. This file includes all possible size and color variations for the logo. Color variations usually consist of a color version and a black and white one.

Another way you might use a master Illustrator file is when you are creating a series of similar type treatments that will appear throughout a project. You would use this file each time that you need to create a headline variation, as the file already contains the type size,
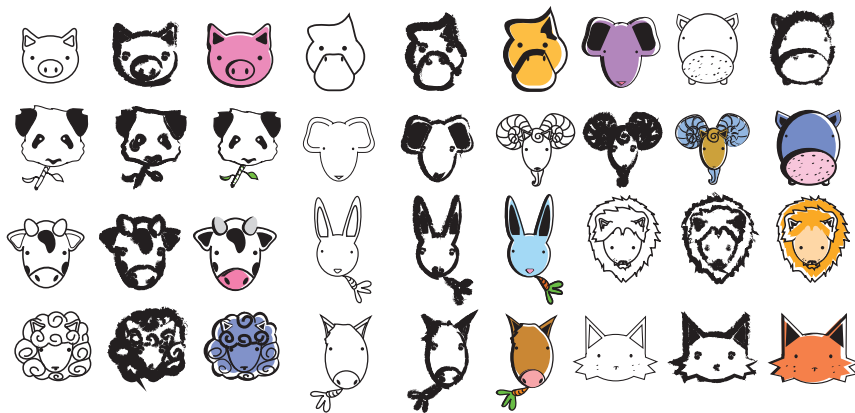

ILLUSTRATION VARIATIONS These spot illustrations began with a simple set of line drawings created with the pen tool. The variations were then created by applying a series of different techniques to the original illustration, such as applying brushes, using the Width tool, and Outline Stroke.

LAYOUT VARIATIONS Once the type treatment variations have been completed, you can move on to the actual layout designs. The halftone effect used in the background of these covers is created using Illustrator and then copied into Photoshop as a Vector Smart Object. Using a stream of consciousness approach when you're designing can lead to a series of similar and related design iterations.

SEARCH TYPEFACES When designing logotypes, start by considering a range of typefaces. Type out the words in the design in different styles, such as all caps, upper and lower case, and small caps.

LOGOTYPE VARIATIONS This set of designs employs many techniques, from altering the type outlines to using inlines and outer shapes.

color, and line weight information. Like the Photoshop master file, all of your related type treatments will originate from this file.

BUILDING MASTER PAGES

Just as the baseline grid helps maintain consistency throughout your design, building master pages in InDesign ensures that all foundational elements are placed accurately on every page. Because InDesign is a page layout program, it has a unique system for building master pages, one that is powerful and easy to use. It can save a designer hours of tedious work, as it seamlessly maintains consistency over the entire project. Essentially, when you create a master page you are building a template that has all the formats and page elements in preset positions. These formats include margin, gutter, and column information, as well as any elements that need to be positioned precisely on all pages. For instance, you do not want to manually place a page number, commonly called a foot and folio, on every page of your layout. When you manually place these elements, the margin for error is high. It is easy to incorrectly number

Cutting to the Chase: Designing with Die Cuts

Die cuts are just one of the many production options designers have when creating custom formatted print projects.


This invitation design contains a circular die cut and is scored and folded twice to create an accordion-fold format.

DIE CUTS bring a three-dimensionality to print pieces, but they are very expensive to have produced, because they require that a shaped blade or "die" be custom made.

DIE LINES To indicate where the hole in the design will be cut on the mechanical a die line should be created. Die lines should be specified using a Pantone color that is not being used within the rest of the design. The die line color should be indicated in the slug information for the printer.

DESIGNING WITH FOLDS Folds are indicated on the mechanical as dotted lines. For a fold to be made, the printed piece must first be scored. Scoring refers to the act of pressing an indentation into the paper using scoring blades. This helps ensures accurate folding.

OTHER PRODUCTION OPTIONS There are many specialized processes that designers can use. Most of these options can be quite expensive to output, as they require special tools and additional procedures. Some of these high-end options include embossing, foil stamping, using fifth colors, and spot varnishes and perforations.

Scoring blade   Cutting blade
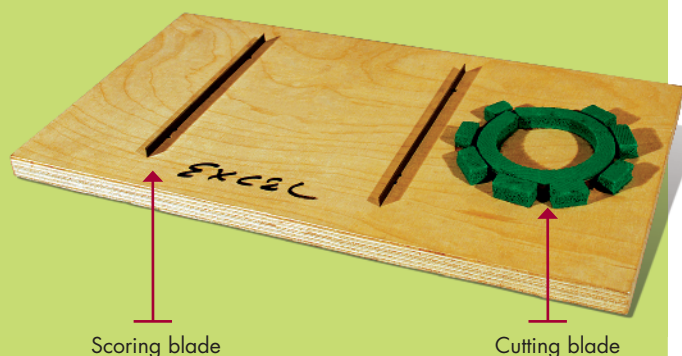
SCORE AND CUT When folds are used in conjunction with die cuts, special dies are required to perform both actions in one process to ensure accuracy. Here a custom die is created to simultaneously score and cut the design. This process occurs after the printing and is typically the last step in the production process. Both the blade and scoring blades are positioned according to the mechanical. The mechanism is placed on a press and uses pressure to both cut and score the piece simultaneously.

As pressure is applied downward onto the paper, the hole is cut out and indentations are created to make the folds.

A circular blade is mounted onto the board and surrounded with a green rubber bumper. This bumper provides resistance when pressure is applied.

Pressure applied downward to cut and score

When pressure is applied, the scoring blades are positioned to create indentations where the folds will be.
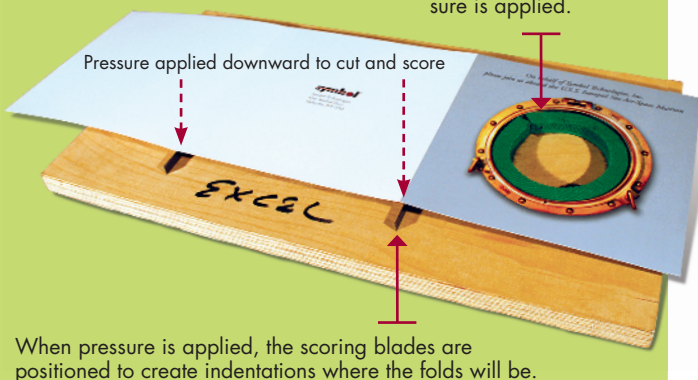
the pages, especially if pages are added or deleted during your layout, or to inconsistently position the page numbers from page to page. By using master pages, you will never have to worry about such problems, as InDesign has an autopagination feature that automatically numbers the pages and updates the numbering if the order of the pages changes.

Any element that you need to appear consistently throughout your pages can be used as a master element. These include linked column text boxes, rules between these columns, background tints, and eyebrows. Eyebrows are usually elaborate section heads that typically appear in the top outside corner of a page to define the specific section within which the page appears. When these elements are placed on the master page, they become master elements. Once you have created a master page, you can simply drag out a copy and all of the page's foundation elements will appear precisely as you positioned them. From this master page you can create other master page variations. Different versions of master pages are often created according to their page orientation. For instance, the positioning of elements may change depending on whether the page falls on the right- or left-hand side or appears as a facing page on a spread.

Master pages are a valuable time-saving device for designers. Designers working on a weekly magazine don't have time to build each page from scratch every week. Because of tight deadlines, designers depend on these features to help them create well-designed pages in a timely manner.

Along with master pages, designers also create libraries of commonly used elements that can be set up in InDesign. This allows them to simply drag out prebuilt elements and then adjust them to meet the specific requirements of their page layout. Another time-saving device that can be set up in a master file are style sheets, which enable designers to flow text into a design so that it is already styled according to the magazine's specifications. By taking advantage of all these methods, designers are free to spend their time focused on design considerations rather than page production.

CONSIDERING DESIGN AND PRODUCTION

There are essentially two separate parts of designing any project, the design process and prepress production. The design process involves developing the look and feel of a design and the many different aspects that go into that design, such as the typefaces, imagery, and formatting options being used. The second part of designing a project, the prepress production, involves preparing the file so that it will output properly on a four-color printing press. This part of the process involves the sizing and prepping of the images so that they are in the proper resolution, color model, and file format. It also involves checking the image links and creating PDF files to be submitted to the printer.

While it is optimum to design a project and keep the production considerations in mind at the same time, sometimes it can be beneficial not to concern yourself with the production until the design's look and feel becomes more developed. I often take this compartmentalized approach when I design. For instance, when I design and lay out photos I will size an image up or down in InDesign without worrying about resizing it later in Photoshop. I also design without worrying about the color model and file formatting of my images, as I will tend to the production duties later on as the design becomes more developed and closer to actually going to press.

SPECIALITY PRINT OPTIONS

Designers have many specialized print processes that they may consider depending on the budget they're working with. Some high-end options include the use of fifth and sixth colors, spot varnishes, die cuts, embossing, and foil stamping. They also have many choices when it comes to selecting paper stocks for their projects to be printed on. There are many paper companies that offer a range of paper stocks and vellums with different weights and textures available. Understanding and being well-versed in these options will help present your client with a range of options for the production of their projects.

INTEGRATING THE SOFTWARE SUCCESSFULLY

It is paramount that designers have a high level of understanding and technical expertise in all three of the major design programs used for print—Illustrator, Photoshop, and InDesign—and even more important, that they can integrate the software properly and take advantage of each program's strengths. Often the best designs are put together using all three of these programs: Illustrator for graphic elements and elaborate type treatments, Photoshop for manipulating images, and InDesign to layout the overall design. Once you've attained a proficiency in each of these programs, you will have a wealth of technical and creative knowledge to design with.