

# Adobe InDesign

## InDesign Level 3

City of Sydney Library courses



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# Styles

## Styles Overview

Styles allow you to define and save the formatting and behaviour of paragraph and character text, objects, cells and tables. Using styles is fast and efficient and can save you time by keeping your document formatting more consistent and manageable.

## Paragraph Style

Paragraph styles apply to the whole paragraph and contain formatting for both the character attributes: font, style, leading, tracking & kerning, colour, scale and paragraph attributes: indents & spacing, align, tabs, hyphenation.

### Create a paragraph style:

1. Start by formatting your text in the document window including the character and paragraph attributes, indents & spacing, alignment, colour etc.
2. With the text still selected open the paragraph styles panel and select new paragraph style from the top right drop-down menu
3. Choose a style name
4. Click apply style to selection
5. Press OK to save a style

Note: You can also create a paragraph style first within the paragraph styles panel, then apply the style to the paragraph text in the document.

### Assign paragraph styles to another paragraph:

1. With the text tool click into the other paragraph text that you want to apply the style to
2. With the paragraph styles panel open click on the style to assign it to the whole paragraph

## Character Style

Character styles are similar to paragraph styles, except they only apply to the selected characters verses the whole paragraph.

### Create a character style:

1. Start by formatting your text using the character attributes such as font & style, fill & stroke, leading, tracking and kerning
2. With the text still selected open the character styles panel and select new character style from the top right drop-down menu
3. Choose a style name
4. Click apply style to selection
5. Press OK to save a style

### Assign character styles to another character:

1. With the text tool select the characters (words) that you want to apply the character style to
2. With the character styles panel open click on the character style to assign it to the selected characters



### Tip

You can also create a paragraph style first within the paragraph styles panel, then apply the style to the paragraph text in the document.



# Edit Styles

## Object Style

Object styles allow you to format and save graphics and frames settings including colour and stroke, transparency, drop shadows, paragraph styles, frame fitting, text wrap, and more. You can choose to apply the effects to the object, fill, stroke, and text.

### Create an object style:

1. Set the attributes of a object frame in the document window including the fill and stroke, corner options, transparency, drop shadows, paragraph styles and frame fitting
2. With the object still selected open the object styles panel and select new object style from the top right drop-down menu
3. Choose a style name
4. Click apply style to selection in the general tab
5. Press OK to save the style

### Apply object styles

1. Select an object, frame or group that you want to apply the style to
2. With the object styles panel open click an object style to apply a style

## Redefine Styles [+]

If you make formatting changes to the text or objects within the document a plus [+] sign will appear next to the name of the style. The plus [+] indicates that you have changed something about the text or object and it no longer matches the original style. At this point you have two options, override the style returning it back to its original style or updating the original style to match your changes which redefines the style.

### Override

To clear the changes you made and override and put the text or object back to the original style:

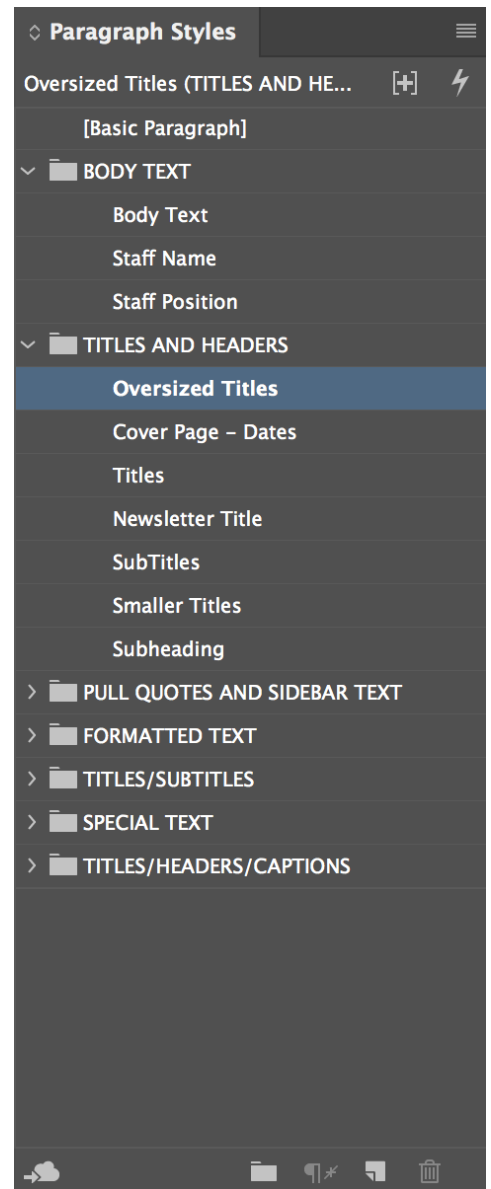
1. Select the text or object you want to override
2. In the styles panel menu choose clear overrides

### Redefine

Alternatively, If you decide you like the changes you made to the text or object you can redefine the existing style with the new version.

1. Select the text or object that is using the style you want to now use
2. In the styles panel menu choose redefine style

The style is updated to match the settings you applied. Any other objects using this style in the document are now updated.



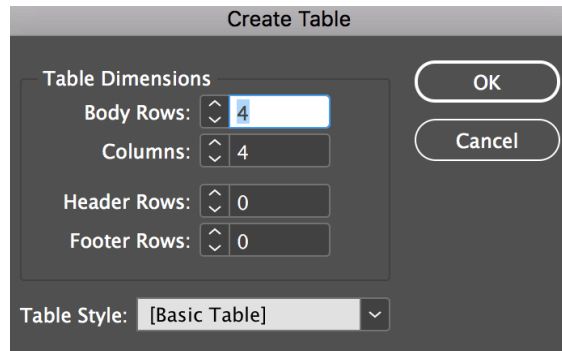
# Tables

## Understanding Tables

InDesign tables allow you to compare information easier by arranging type into rows and columns. Tables can be created from scratch or existing text can be converted into a table. Tables are contained within a text frame.

### Create a table from scratch:

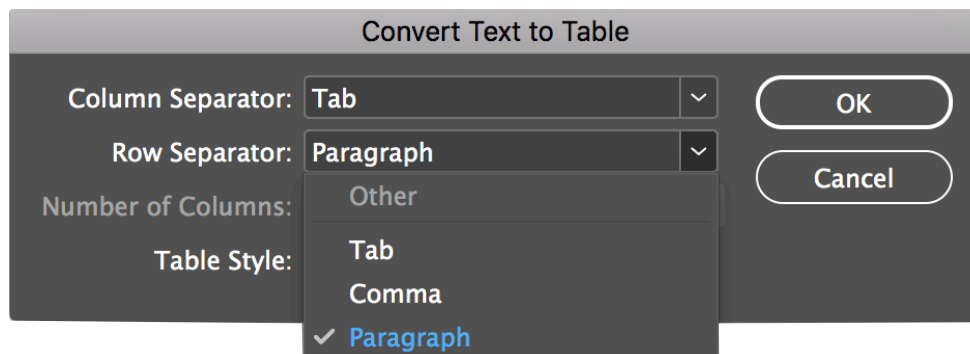
1. Choose Table > Create Table
2. Specify the numbers of rows and columns and press OK
3. Drag an area on screen to place and create the table within a text frame



### Convert Text to a Table:

1. Prepare the text with tabs or commas for the table to be separated into rows and columns
2. Choose Table > Convert Text To Table
3. In the column separator and row separator field choose tab, comma, or paragraph option
4. Click OK

### Convert text to Table



### Convert text



|                |     |     |     |     |
|----------------|-----|-----|-----|-----|
| Monthly Report |     |     |     |     |
| Monday         | 100 | 200 | 300 | 400 |
| Tuesday        | 1   | 2   | 3   | 4   |
| Wednesday      | 10  | 20  | 30  | 40  |
| Thursday       | 30  | 40  | 50  | 60  |
| Friday         | 1   | 2   | 3   | 4   |

### Table



| Monthly Report |     |     |     |     |
|----------------|-----|-----|-----|-----|
| Monday         | 100 | 200 | 300 | 400 |
| Tuesday        | 1   | 2   | 3   | 4   |
| Wednesday      | 10  | 20  | 30  | 40  |
| Thursday       | 30  | 40  | 50  | 60  |
| Friday         | 1   | 2   | 3   | 4   |

# Editing Tables

## Editing Tables

### Add text to a table:

1. With the type tool selected click inside a cell and start typing
2. To move to the next cell press the tab key
3. To create a new row at the end of the table click in the bottom right cell and press tab

### Add graphics to a table:

1. With the text tool selected, click in the table cell that you want to add the image
2. Choose File > Place and place the picture into that cell

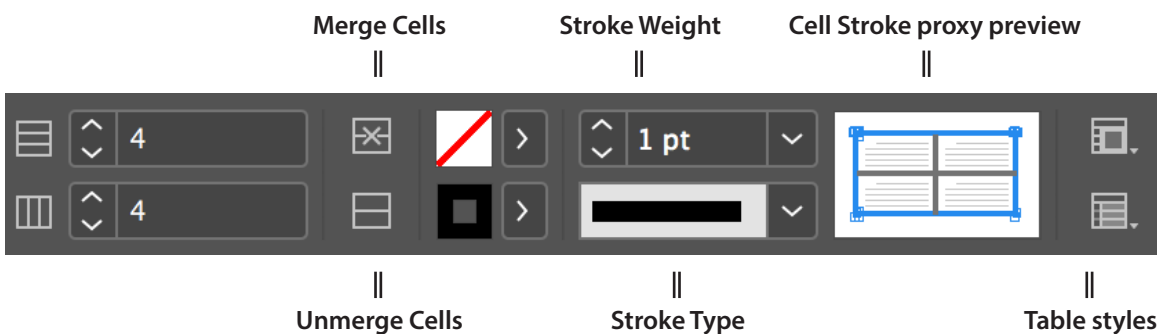
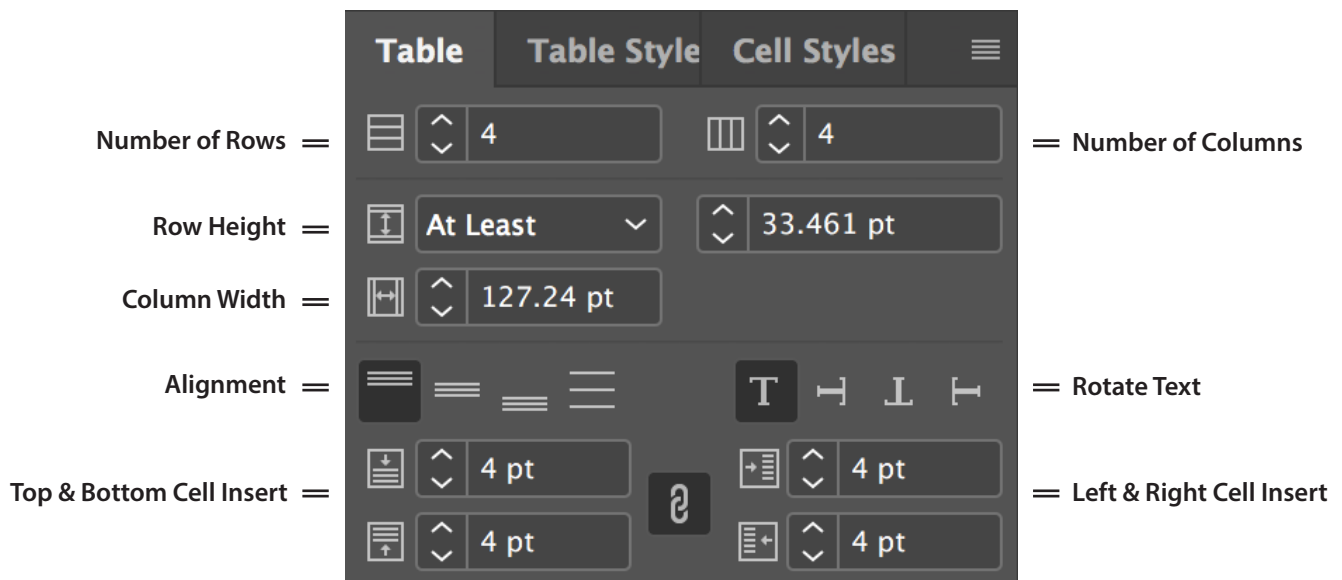
### Merge cells:

1. With the type tool select the cells you want to merge
2. Choose Table > Merge Cells or click the merge icon in the control panel

### Distribute columns and rows evenly:

1. With the text tool click and drag in the cells for either columns or rows that that you want to distribute
2. Select Table > Distribute Rows Evenly or Distribute Columns Evenly

Table Panel



# Pages

## Working with Pages

The pages panel shows a thumbnail view for each page in your document. Regular pages that make up the document are located in the lower half of the pages panel with master pages located in the top section separated by a line. Elements placed on a master page will appear on all regular pages in the document that have the master applied. Regular pages have an assigned master page prefix letter indicating which master is applied to that page, for example [A] Master.

### Create a page

To create a new page do one of the following:

1. Click the create new page icon at the bottom right of the pages panel
2. From the pages panel fly-out menu choose number of pages to insert and location
3. Right click on a page thumbnail and select insert pages

### Delete a page

To delete a page do one of the following:

4. Select the page thumbnail icon and click the bin icon at the bottom right
5. Select the page to delete then from the pages panel flyout menu choose delete
6. Right click on a page thumbnail and select delete page

### Move and insert pages using

To move and insert a page do one of the following:

7. With the page thumbnail selected choose move pages from the pages panel fly-out menu and choose a new destination. For example, at the beginning of the document.
8. In the pages panel drag a page icon to a new position within the document. A vertical line reveals where the page will be inserted.
9. In the pages panel right click on the page and select move pages, then choose a destination.

### Apply master pages:

To apply a master page to a regular page from the top area of the pages panel drag a master page and drop it onto a regular page in the lower section of the pages panel. The master page prefix letter will appear on the destination page indicating which master is applied.

### Adding page numbers:

1. Double-click the master page in the pages panel to open it in the document window
2. Create a text frame and position the text where you want the page number to appear
3. Option to add text before or after the page number, such as the word page
4. Choose Type > Insert Special Character > Markers > Current Page Number
5. Create separate page numbers for the left and right master pages so numbers appear on both sides of the spread

### Add running headers:

1. Double-click the master page in the pages panel to open it in the document window
2. Add a text frame where you want to add the running header
3. With the text selected choose Type > Text Variable > Running Header
4. Set the running header style to the paragraph style you want it to follow
5. Press OK

### Pages Panel

Pages Panel

Pages Menu

- Insert Pages...
- Move Pages...
- Duplicate Page
- Delete Page
- Print Page...
- Apply Master to Pages...
- Override All Master Page Items
- Create Alternate Layout...
- Numbering & Section Options...
- ✓ Allow Document Pages to Shuffle
- ✓ Allow Selected Spread to Shuffle
- Page Attributes
- View Pages
- Panel Options...

Pages Menu

Drag to Move Pages

Page Size New Bin

Insert Pages

Pages: 1

Insert: After Page

Master: ✓ After Page  
Before Page  
At Start of Document  
At End of Document

OK

Cancel

Insert Pages Panel



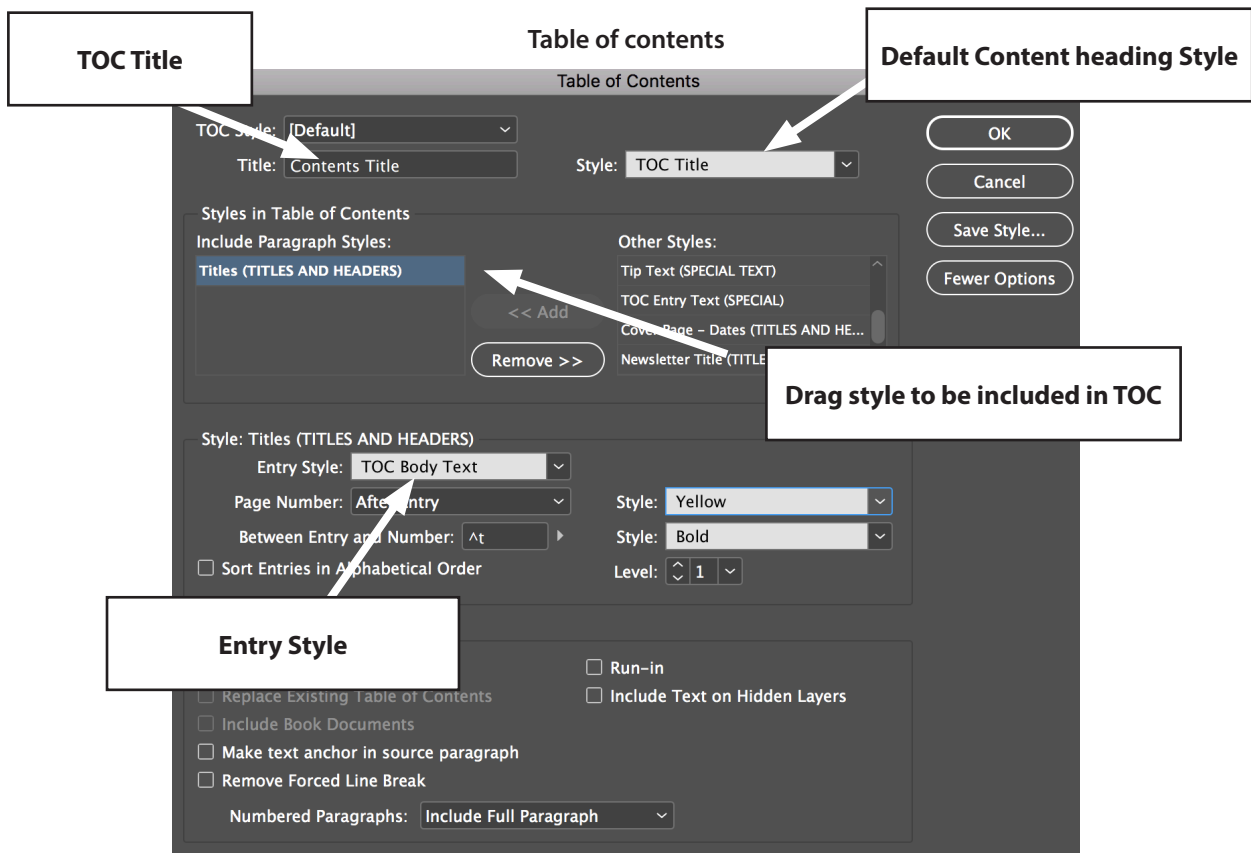
# Table of Contents

## Creating a Table of Contents (TOC)

A table of contents is used to display a list of chapter titles and page numbers to help readers find information throughout a document. To create a table of contents first create paragraph styles for the chapter headings that the TOC will use to follow. When generating a table of contents you can set paragraph and character styles to define how the table will look.

### Generate a table of contents:

1. Create a new page in the document to place the table of contents
2. Choose Layout > Table Of Contents
3. Choose a title for your TOC which will appear at the top of the table of contents
4. Select the default TOC title style (adds a paragraph style)
5. Select the default TOC body style
6. Select which styles you want to include in the table of contents paragraph styles in the other styles list and add them to the include paragraph styles list
7. In the more options section, there are options to add styles for page number and in-between entry and number
8. Click OK and place the text on the page you created



# Index

## Creating an Index

An index is a detailed alphabetical list of names and topics along with the page numbers on which they are located. An index entry can consist of a level 1 and level 2 topics and cross-referencing to other index entries such as 'see also'.

### Create an index:

1. Choose Window > Type & Tables > Index
2. Select the text in the document you want to add
3. Click create a new index entry at the bottom of the index panel
4. Select or Select All
5. press OK

### Generate and place the index:

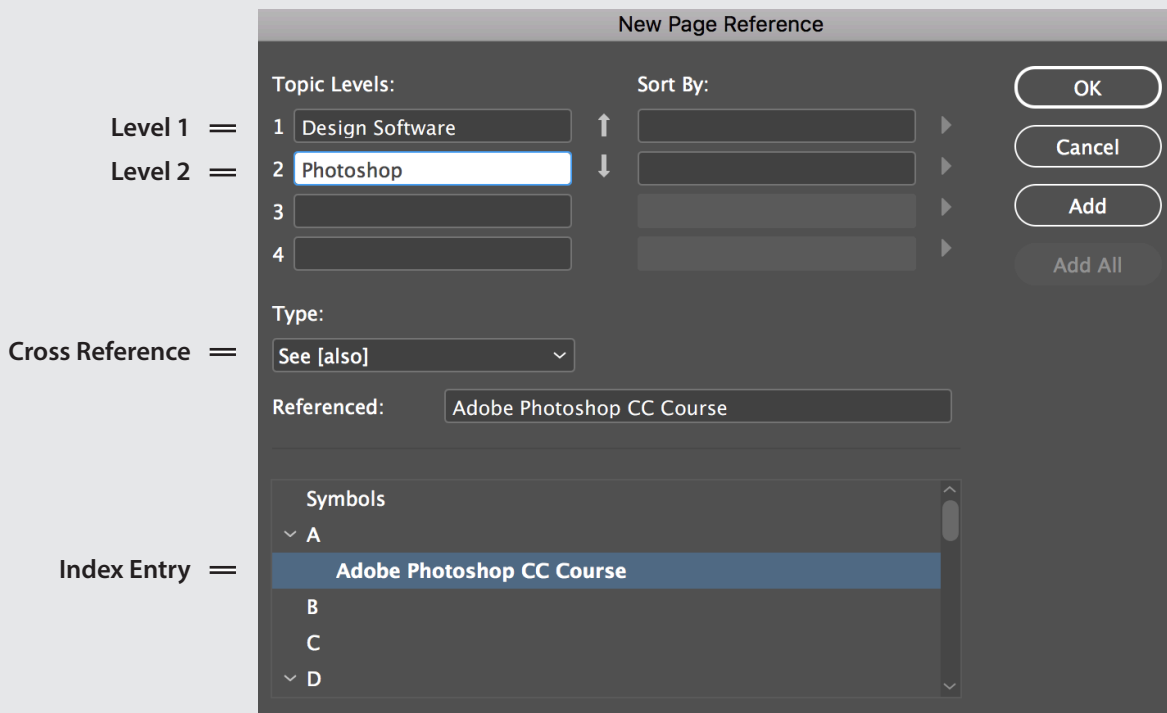
1. Create a new page to place the index onto
2. Click generate index from the bottom of the index panel
3. Choose a default index title style (optional)
4. With the loaded cursor place the index

### Update the index:

1. Add as many new index entries as desired
2. re-click generate index
3. Press OK and the index will update the currently placed index



### Index Entry Panel



# Interactivity

## Create Hyperlinks

Create hyperlinks to link to external web pages, URLs, email as well as linking to pages and text anchors within an InDesign document. Start by creating the destinations within your document, (example: Text Anchor) then create the Hyperlinks (buttons) to link to the different destinations.

### Create a hyperlink to a web page (URL):

1. Select an object to use as the source hyperlink (button)
2. Choose new hyperlink from the hyperlinks panel menu
3. Choose URL from the link to menu
4. Type in a URL web address
5. Press OK

### Create a page hyperlink:

1. Select an object to use as the source hyperlink (button)
2. Choose new hyperlink from the hyperlinks panel menu
3. Choose page from the link to menu
4. Choose the page number and set the zoom level
5. Press OK

### Create a hyperlink destination (text anchor):

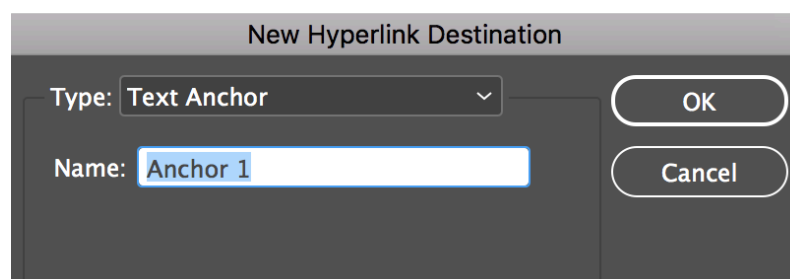
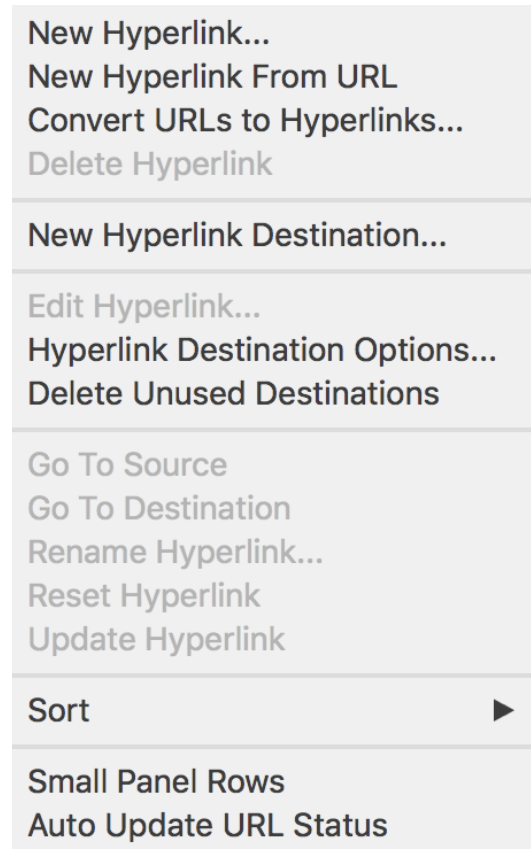
1. Using the type tool place the insertion point in the text that you want to become a hyperlink destination
2. Choose new hyperlink destination from the hyperlinks panel
3. Select text anchor from the hyperlink destination panel
4. Press OK

### Create a hyperlink:

1. Select an object to use as the source hyperlink (button)
2. Choose new hyperlink from the hyperlinks panel menu or click the create new hyperlink button at the bottom of the hyperlinks panel
3. Choose text anchor from the link to menu
4. Choose the text anchor destination you created from the text anchor menu
5. Press OK

### Export:

1. Choose File > Export > Adobe PDF Print
2. Tick the hyperlinks and bookmarks buttons to include



Hyperlink Destination

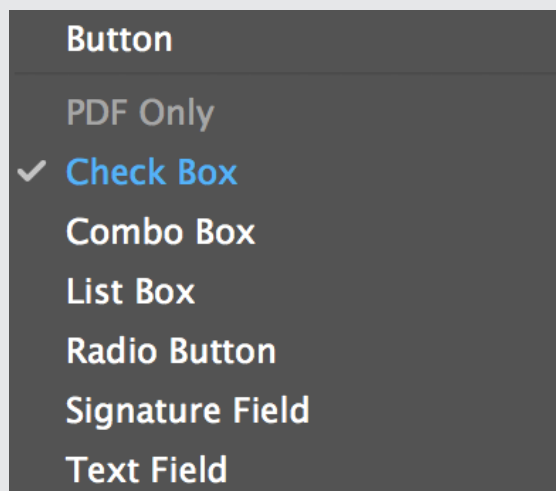
# Create Buttons

Create a button that navigates to a text anchor, next or previous page, website URL or submit a form. To create buttons use the buttons and forms panel. Export a PDF fixed layout EPUB or SWF file.

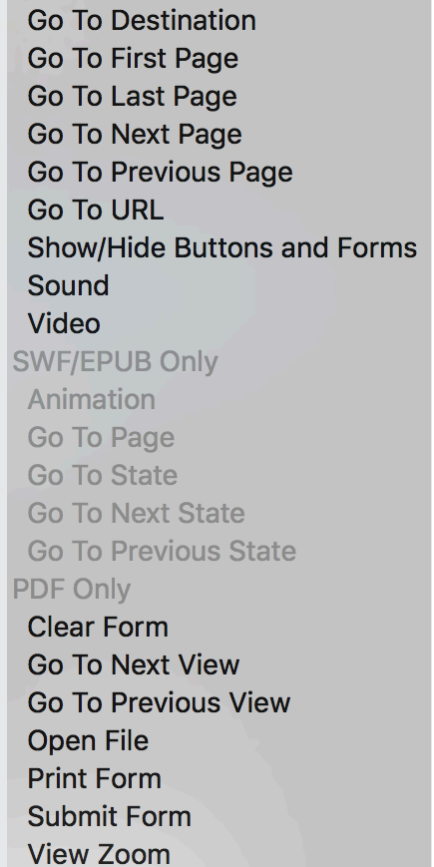
## Create a button:

1. Open the buttons and forms panel (choose Window > Interactive > Buttons and forms)
2. Create an object and choose Object > Interactive > Convert to Button
3. Choose a name and button type
4. Click the add new action icon [+ ] from the actions area of the buttons and forms panel
5. Set the appearance for the button states
6. Press enter

Button Types =



## Button Action



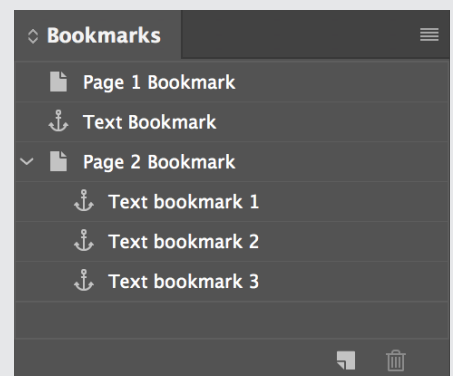
# Create Bookmarks

Create Adobe PDF bookmarks to navigate to pages and text anchors.

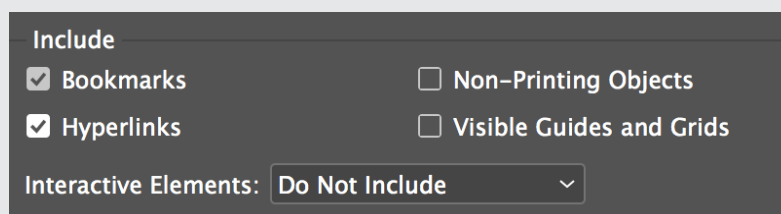
## Create a bookmark:

1. Choose Window > Interactive > Bookmarks to display the bookmarks panel
2. To create a page bookmark select the page area with the selection tool
3. In the bookmark panel click the create new bookmark icon
4. To create a text anchor click an insertion point in text
5. In the bookmark panel click the create new bookmark icon

## Bookmarks



Include in Export =



# Text Threading

## Flowing Text to Multiple Frames

Text can be threaded from one text frame to another. Text frames have in and out ports allowing you to flow the text from one frame to another. You can manually thread the text to each frame or automatically thread longer document text to multiple pages by holding the shift key.

### Thread text manually:

1. With the selection tool click the red overset text icon to fill load the tool.
2. To place the text do one of the following:
  - Click and drag in a empty area to create a new text frame
  - Hover over an already existing text frame and click to place the text

### Thread text automatically:

1. Choose file place and select the text file.
2. Hover over the text frame (or margin) hold the shift key and place the text. The text then autoflows and creates new text frames and new pages as needed.

### Show text threads direction line:

Choose View > Extras > Show Text Threading

## Text Thread Continue

To allow the threaded text article to jump from one page to another and for the relevant page number to automatically update, do the following:

1. Create a separate text box underneath the first text frame and type the text **continues on page**
2. Choose Type> Insert Special Character> Markers> Next Page Number
3. Move to the next page where the text threading will continue
4. Create a separate text box underneath the text thread frame and type **continued from page**
5. Choose Type> Insert Special Character> Markers> Previous Page Number

### Insert Next and Previous Page numbers

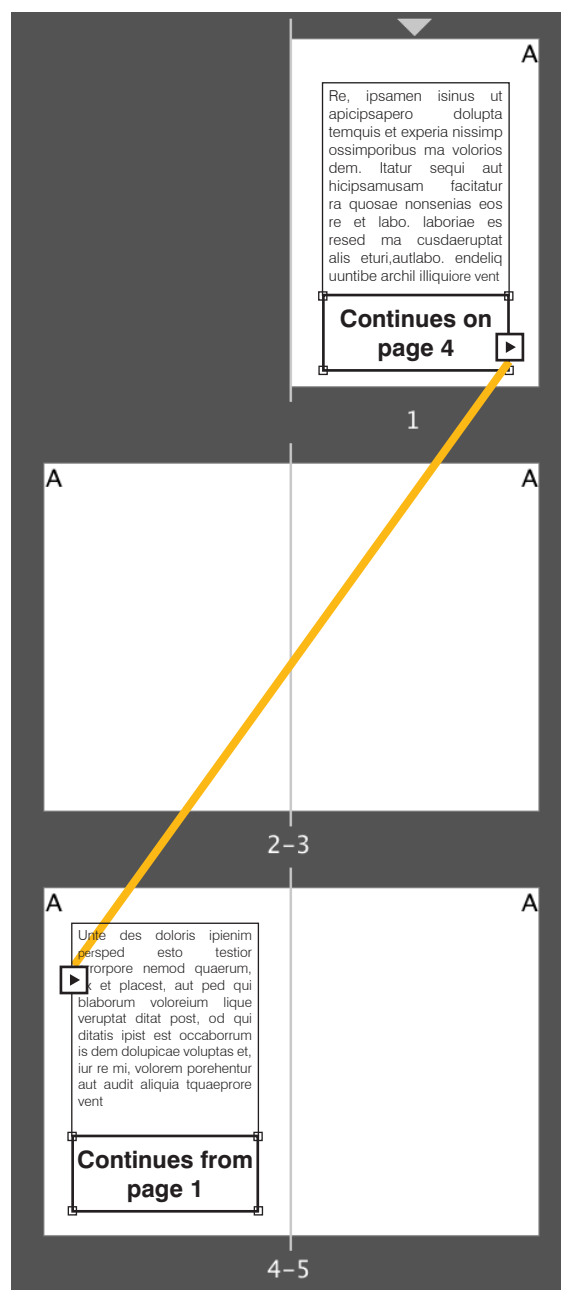
||

|                            |                    |                      |
|----------------------------|--------------------|----------------------|
| Insert Special Character   | Symbols            |                      |
| Insert White Space         | Markers            | Current Page Number  |
| Insert Break Character     | Hyphens and Dashes | Next Page Number     |
| Fill with Placeholder Text | Quotation Marks    | Previous Page Number |



### Note

The continue text frames must touch their relevant threaded text frames for the page numbering to display properly.





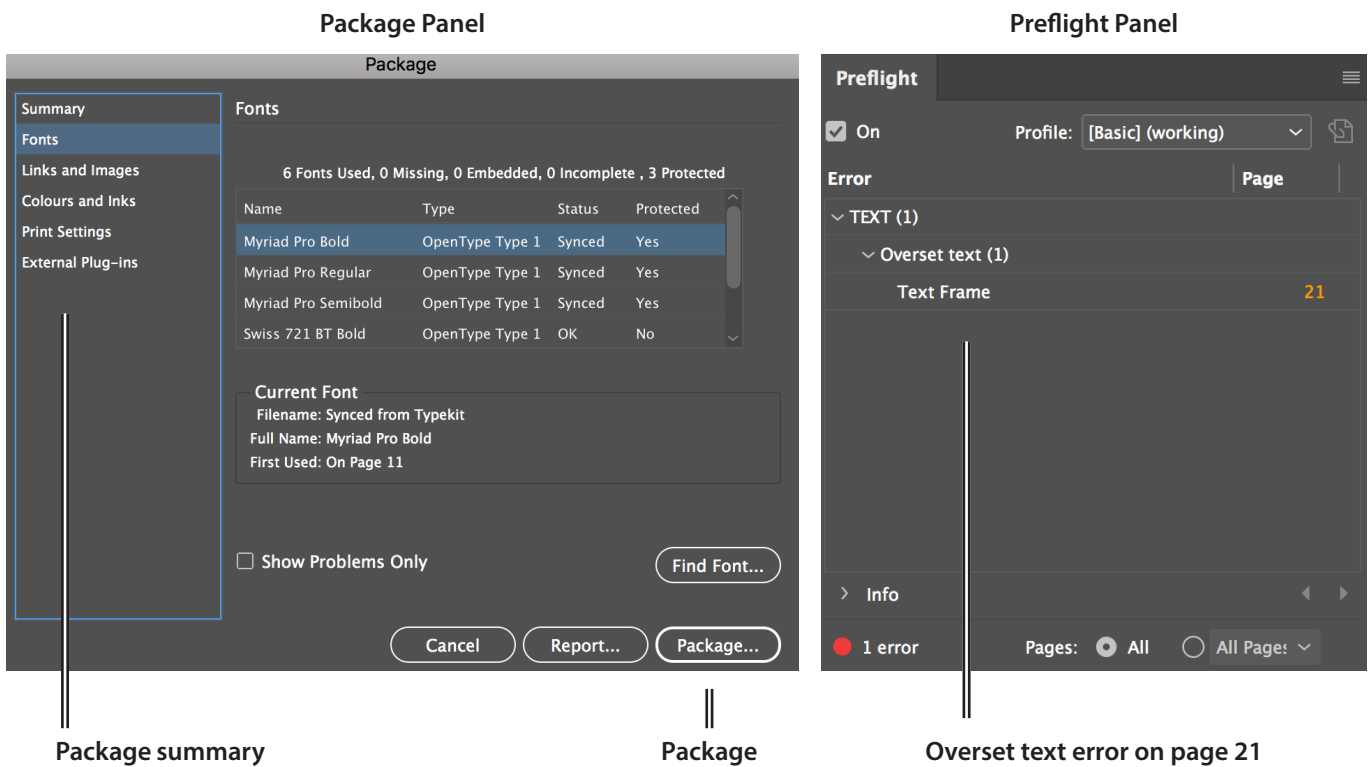
# Package

## Package Files

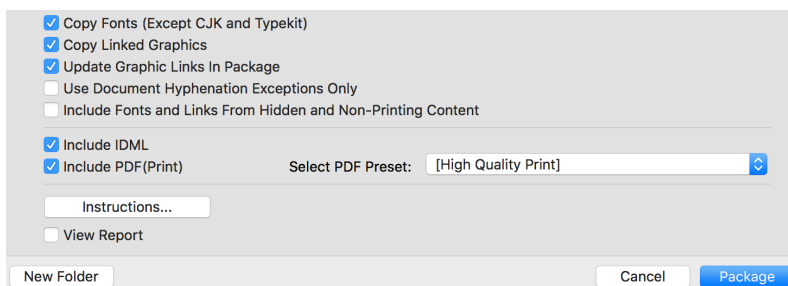
The package command allows you to collect and copy all the linked graphics, fonts and colours to a new folder preserving the document. When you use the package command, InDesign checks the entire document and warns of any errors, which can be fixed using the preflight panel.

### To package a document:

1. First check the document for any errors using the preflight panel (Window > Output > Preflight)
2. Choose File > Package
3. The package dialog box opens where you can fill in any printing instructions
4. Click continue, and choose a location where you want to save the packaged files
5. A warning message appears to check any font licence agreement restrictions before sharing fonts
6. Click package




### Package dialog box



### Preflight

#### Overset text

Overset text error is when the text frame is smaller than the text. A red plus  appears in the lower-right corner of the frame, indicating overset text. Increase the size of the text frame to reveal your text.

# Save and Export

## Save and Export Your Document as a PDF

### To save your InDesign document:

1. Choose File > Save as
2. Give your document a title
3. Choose Format > InDesign CC 2018 document

Note: Format options allow you to save your document as a template or for an older version of InDesign.

### To export your InDesign document:

To share your finished document export a PDF

1. Choose File > Export
2. Name the file, choose Adobe PDF (Print) for the format option
3. Click save and in the export Adobe PDF preset dialog box that appears do one of the following:
4. To print on a desktop digital printer choose High quality print from the Adobe PDF preset dialogue box
5. To email your document choose smallest file size from the Adobe PDF preset dialogue box
6. Click export to output the PDF

Note: To convert all your images from CMYK to RGB or vice versa go to output setting within the export panel and choose convert to destination

### Export settings panel

