Adobe InDesign
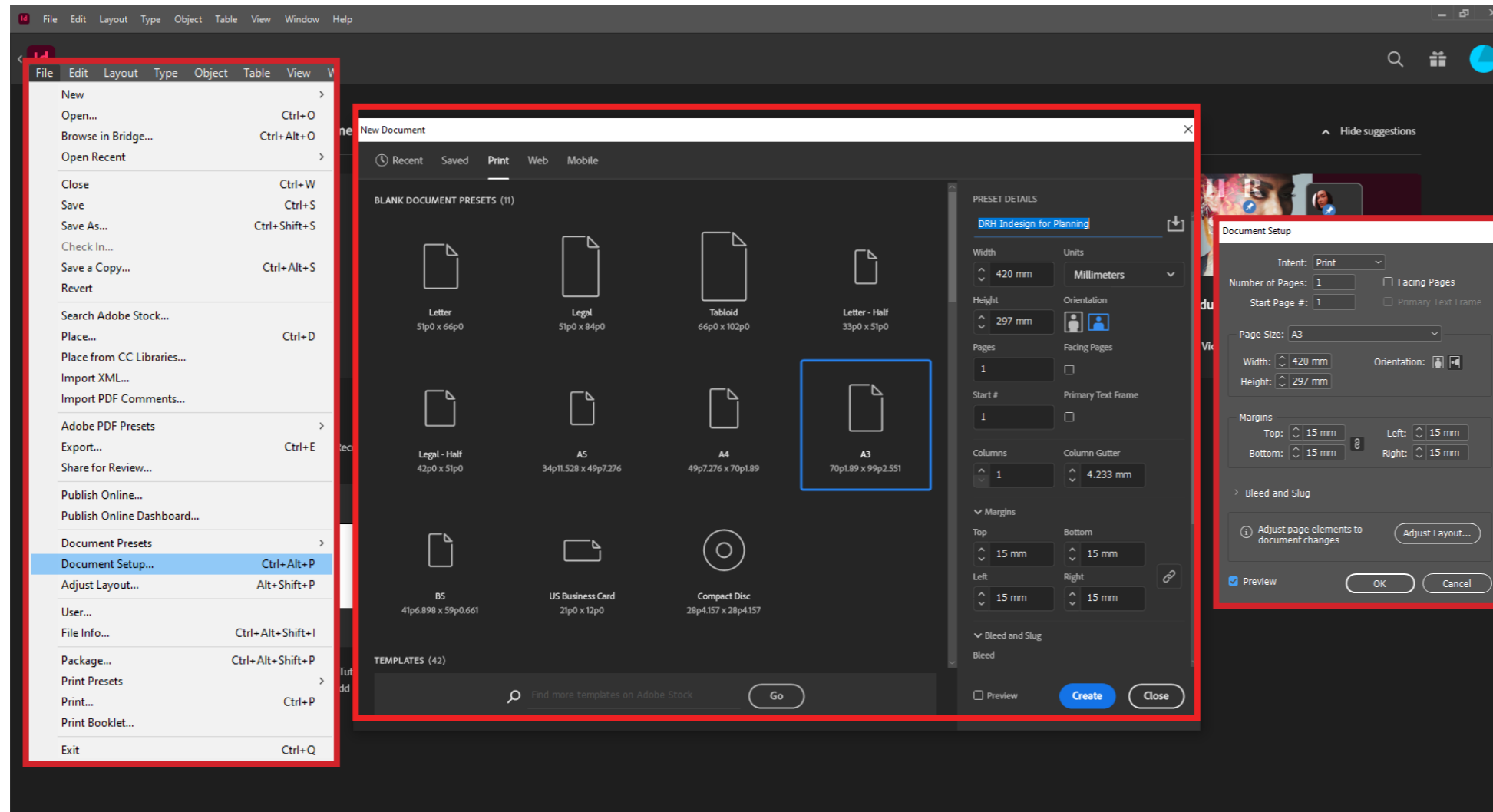
Beginner Tutorial: Mastering the Basics

By **D**igital **R**esearch **H**ub - A.Zhou (2023)

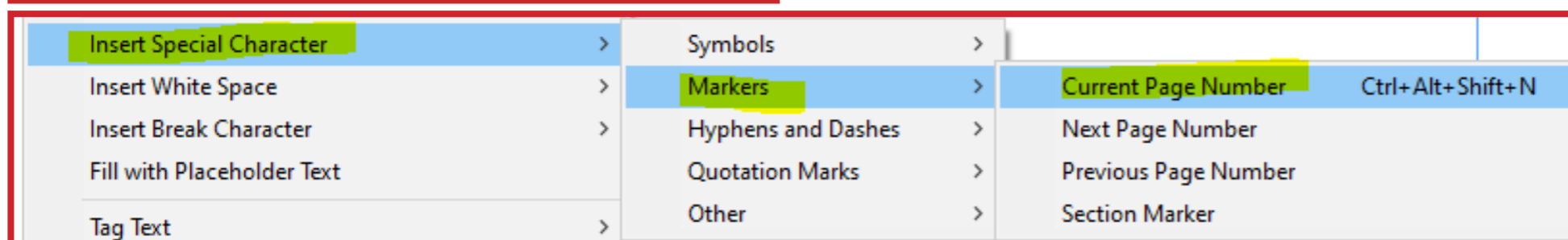# Setting up a New Document

Navigating InDesign:

- Zoom: [Alt] + Scroll Wheel

- Pan: [Space] + Left Mouse

InDesign user guide:

https://helpx.adobe.com/nz/indesign/using/create-documents.html

1. Launch **InDesign** and Select **File > New > Document**.

2. In the **New Document** dialog box, click a category tab: **Print, Web, or Mobile.**

3. Modify its settings in the right pane.

- **Width and Height:** *Specify the size of the document.*

- **Units:** *Specify the measurement unit for the document.*

- **Orientation:** *Specify a page orientation for the document: Landscape or Portrait.*

- **Pages:** *Specify the number of pages to create in the document.*

- **Facing pages:** *Select this option to make left and right pages face each other in a double-page spread.*

- **Start#:** *Specify which number the document starts on. If you specify an even number (such as 2) with Facing Pages selected, the first spread in the document begins with a two-page spread.*

- **Primary Text Frame: S**elect this option to add a primary text frame on the parent page.*

- **Columns:** *Specify the number of columns to add in the document.*

- **Column Gutter:** *Specify the amount of whitespace between columns.*

- **Margins:** *Specify the margins for each side of the document. To use different values for different sides, delink the dimensions by clicking the chain icon.*

- **Bleed and Slug:** *Specify the position of the bleed and slug along each side of the document. To use different values for different sides, delink the dimensions by clicking the chain icon. (Bleed: Acts as a margin of error when the document is trimmed, after it's been printed.)*

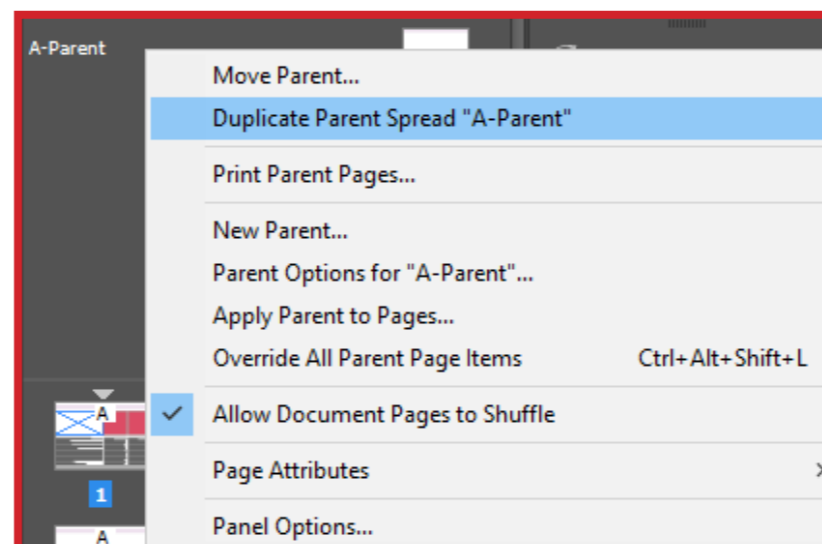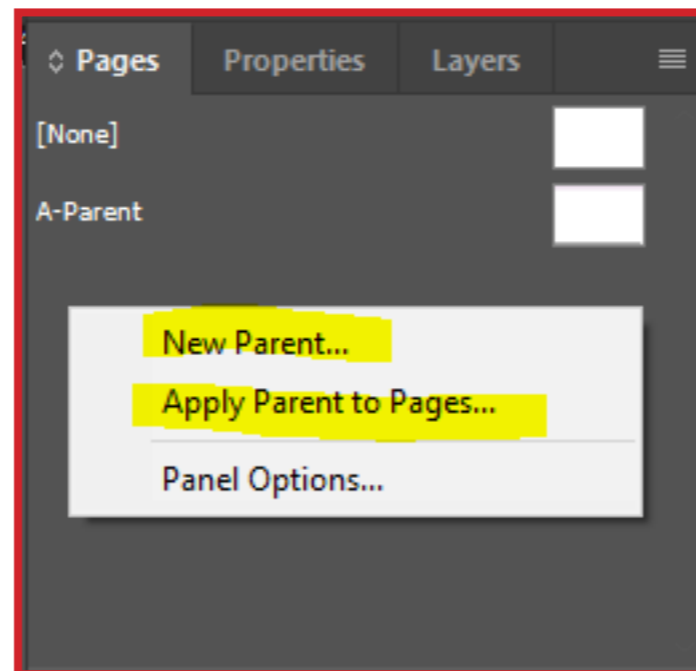- **Preview:** *Select this option to preview the orientation and size of a document before creating a new file.*

4. Click **Create**

Master / Parent Pages

Create a parent page

1. Choose **New Parent** in the **Pages panel menu (Window > Pages)**.

2. Specify the following options, and click OK:

- *For **Prefix**, type a prefix that identifies the applied parent for each page in the Pages panel. You can type as many as four characters.*

- *For **Name**, type a name for the parent spread.*

- *For Based On Parent, choose an existing parent spread on which you'll base this parent spread, or choose None.*

- *For Number Of Pages, type a value for the number of pages you want in the parent spread (as many as ten).*

3. Right click on the pages to see options (Move, Duplicate, Delete pages etc.)

Edit the layout of a parent

- In the Pages panel, **double-click the icon for the parent** you want to edit. The parent spread appears in the document window.

Automatic page numbering:

- Use the **Type Tool (T)** to create a text frame.

- **Page Numbers:** Cursor inside the text frame, **right click > Insert Special Character > Markers > Current Page Number.**

Apply parent pages

- To apply a parent to one page, drag the parent page icon to a page icon in the Pages panel. When a black rectangle surrounds the desired page, release the mouse button.

Margins and Layout
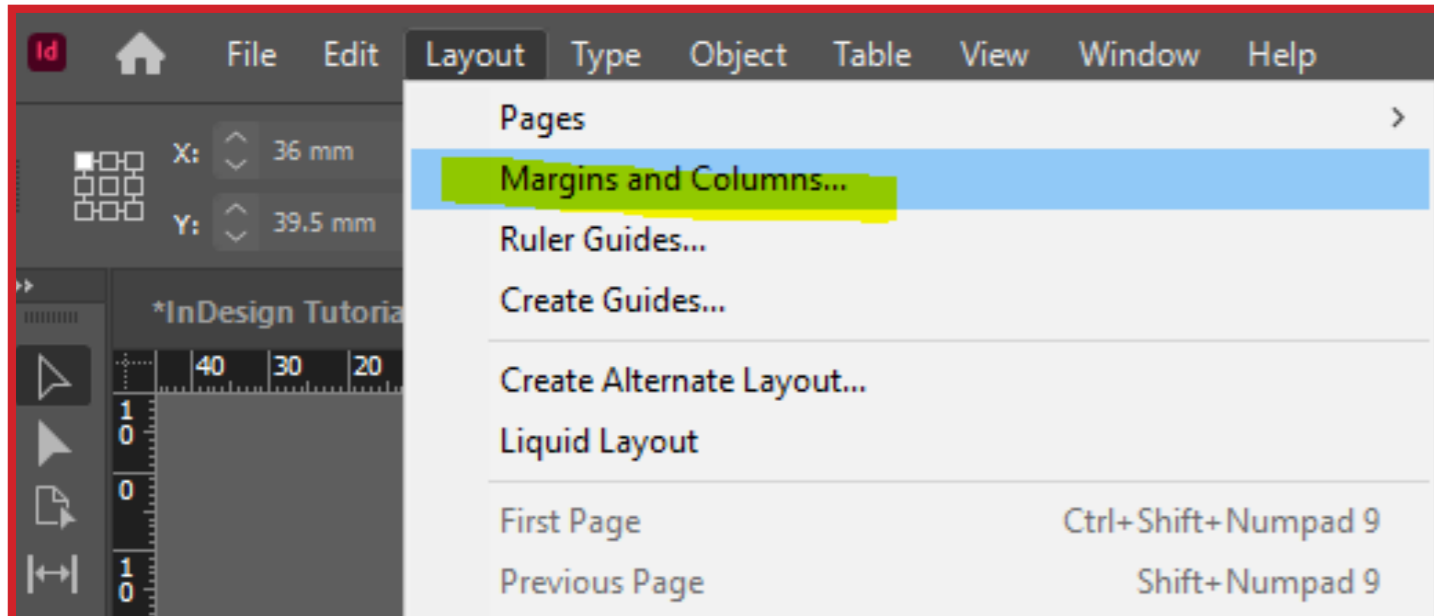
Edit the layout

- **Layout > Margins and Columns**

- **Margins:** *Specify the margins for each side of the document. To use different values for different sides, delink the dimensions by clicking the chain icon.*

- **Columns:** *Specify the number of columns to add in the document.*

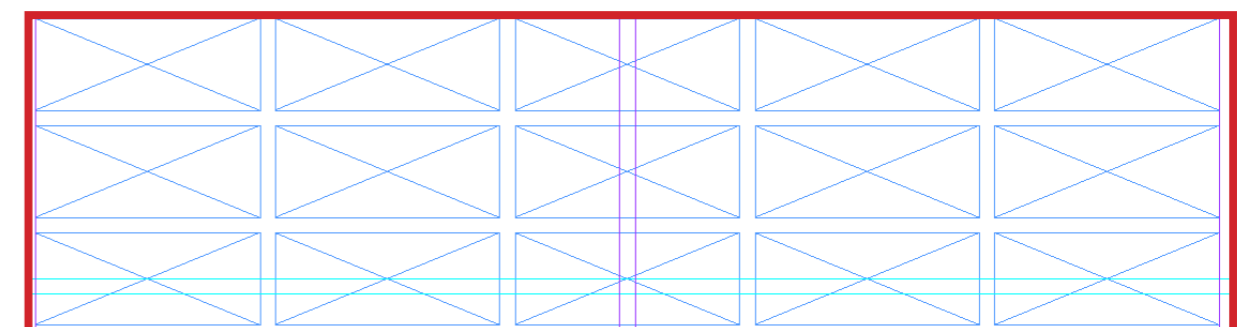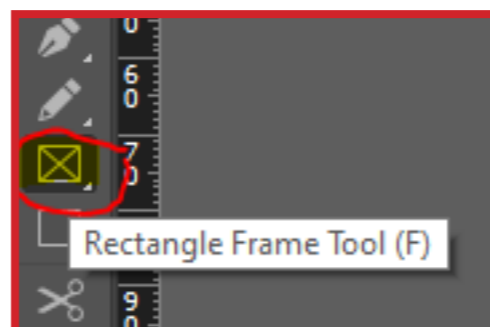- **Column Gutter:** *Specify the amount of whitespace between columns.*

Create Guides
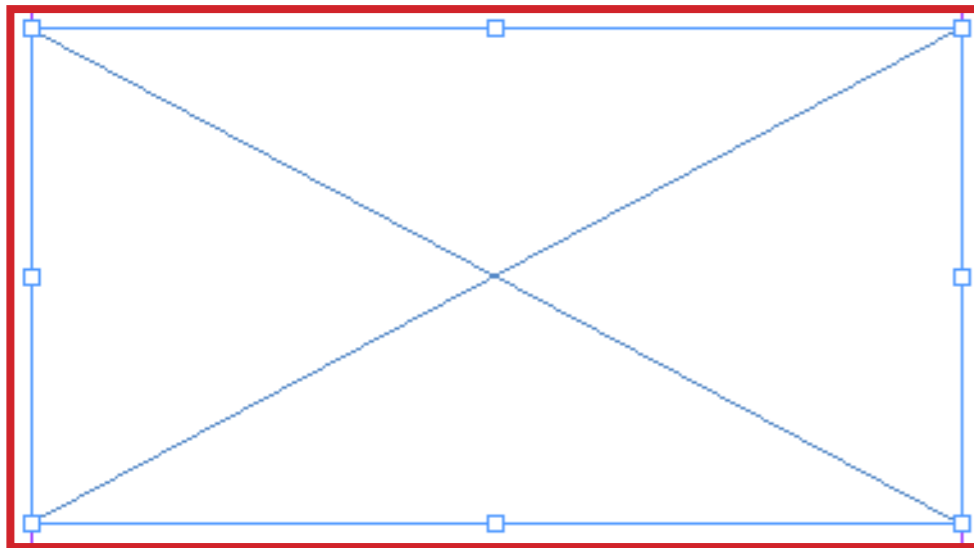
- **Layout > Create Guides**
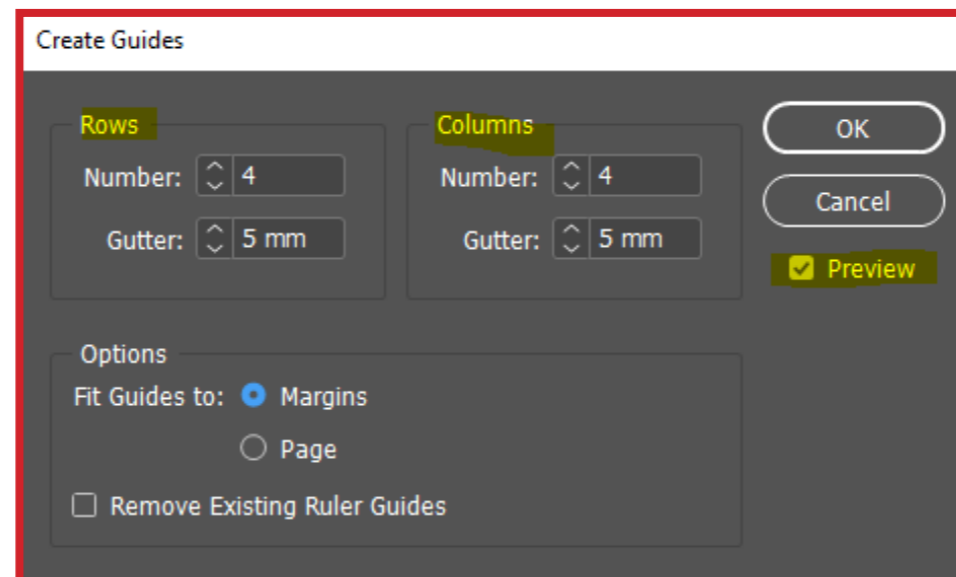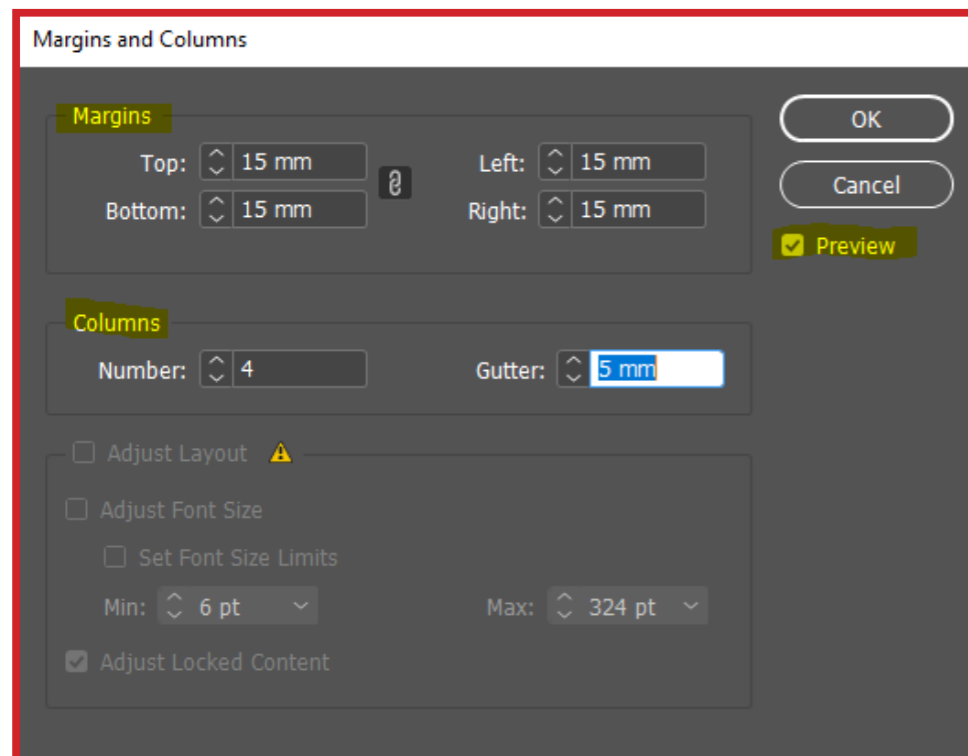
Tricks for Intuitive frames

- **Click** the Rectangle Frame Tool (F)

- Make sure you are holding down the mouse

- Press **Right and Left buttons** for more columns

- Press **Top and Down** to make more rows

- Make divisions for you
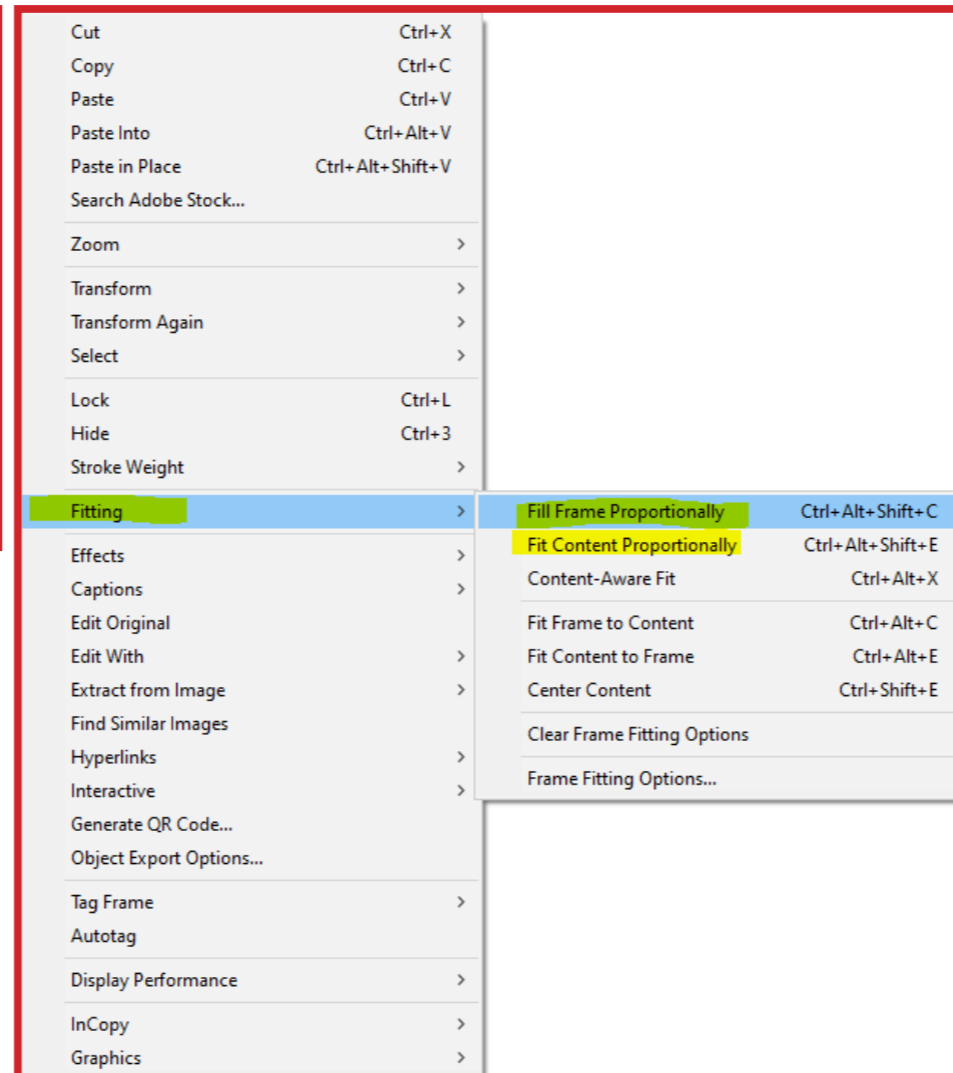
Importing Images/Files

Option 1:

1. Rectangle Frame Tool
2. Find the images in the folder > drag and drop

Option 2:

1. Drag and drop the image from the folder, it will show a little thumbnail
2. Drag the thumbnail on the page, you can dictate the size of the image
3. It will create the frame for you

Hold Ctrl + Shift while dragging and altering the image to change the size of the image and frame simultaneously.

- **Fill Frame Proportionally** - Resizes content to fill the entire frame while preserving the content's proportions.
- **Fit Content Proportionally** - Resizes content to fit a frame while preserving the content proportions.
- **Move image** - double click the image - The blue frame line will stay

Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Paste Into	Ctrl+Alt+V
Paste in Place	Ctrl+Alt+Shift+V
Search Adobe Stock...	
Zoom	>
Transform	>
Transform Again	>
Select	>
Lock	Ctrl+L
Hide	Ctrl+3
Stroke Weight	>
Fitting	>
Effects	>
Captions	>
Edit Original	
Edit With	>
Extract from Image	>
Find Similar Images	
Hyperlinks	>
Interactive	>
Generate QR Code...	
Object Export Options...	
Tag Frame	>
Autotag	
Display Performance	>
InCopy	>
Graphics	>

Fitting submenu:

Fill Frame Proportionally	Ctrl+Alt+Shift+C
Fit Content Proportionally	Ctrl+Alt+Shift+E
Content-Aware Fit	Ctrl+Alt+X
Fit Frame to Content	Ctrl+Alt+C
Fit Content to Frame	Ctrl+Alt+E
Center Content	Ctrl+Shift+E
Clear Frame Fitting Options	
Frame Fitting Options...	

Fill frame proportionally

General Information:

- Linked artwork is connected to, but remains independent of the document.

- Embedded artwork is copied into the document at full resolution, resulting in a larger document.

- When linking files it updates in real time, so if you link a Photoshop file it will also change the file in InDesign. If a change is made double-click on the Warning Icon and it will update.

- You can alter the size of the frame however the original image will not change, in order to change the image you need to click on the circle in the middle of the image or double click the image, the frame will turn orange and you can then transform the image. OR Hold Ctrl + Shift while dragging the image.

- Default image viewing quality is in 'Typical Display' to change this go to View > Display Performance > High Quality Display

- If you save as an InDesign file and you do not File>Package the images and links (if not embedded) will result as Missing Link.

- Use CMYK Color Mode: CMYK stands for Cyan, Magenta, Yellow, and Key (Black), and it is the color mode used for most professional printing processes. This ensures that the colors in your design are accurately represented when printed.

- Common types for importing image: PNG, JPEG or PDF files.
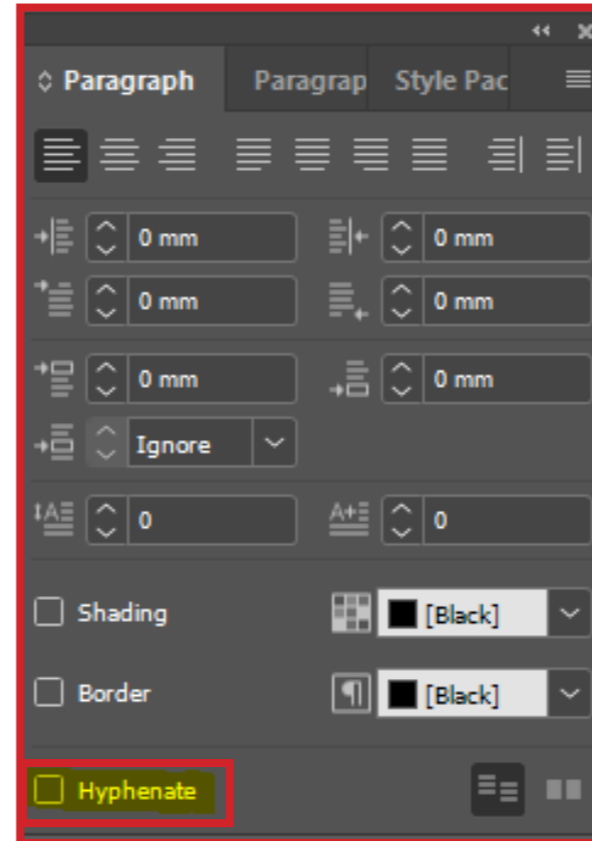
Working With Text
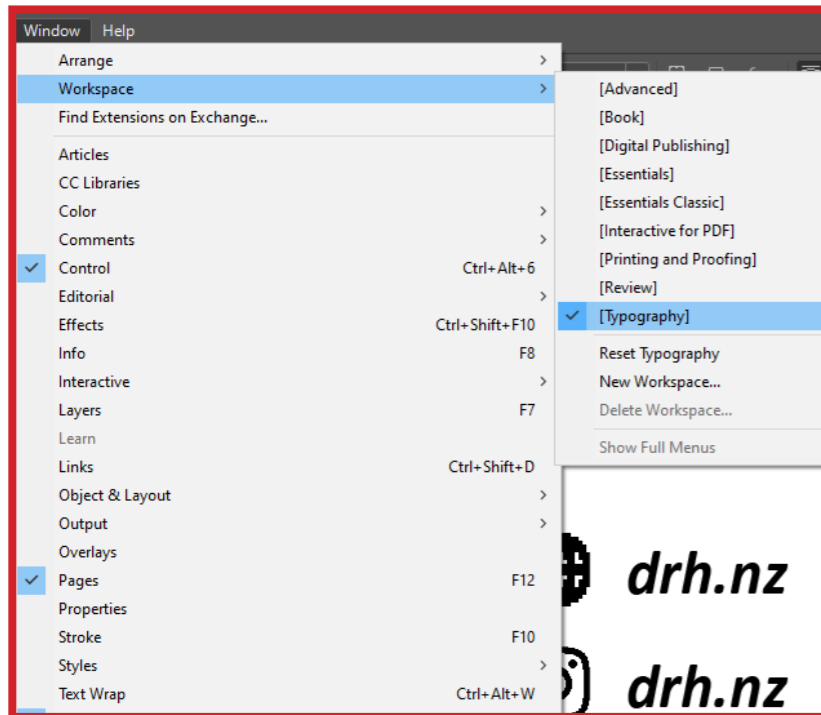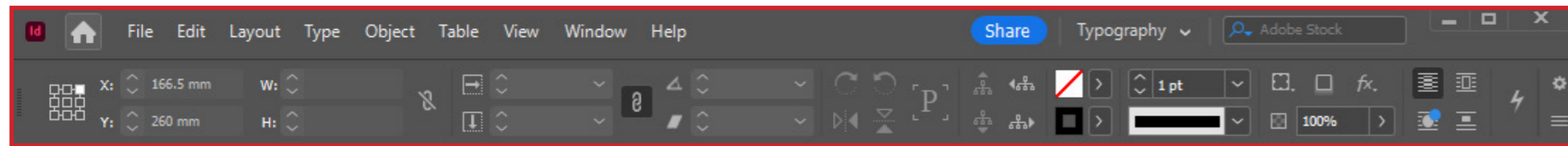
The workspaces of the different Adobe applications share the same appearance. You can switch or save new workspace as your preference by:

Go to **Window > Workspace > Typography**

The Typography workspace provides the most commonly used panels for your layout design.

You can apply colors, gradients, and strokes to characters and continue to edit the text.

You can save **Character Styles** by clicking the **+** icon.

Deselect **Hyphenate** from the **Paragraph panel** to turn off automatic hyphenation for a paragraph.

General Recommendations

**Remember that these sizes are not set in stone, and you may need to adjust them based on the content and the audience's needs. ALWAYS PRIORITIZE READABILITY AND LEGIBILITY ABOVE ALL ELSE.
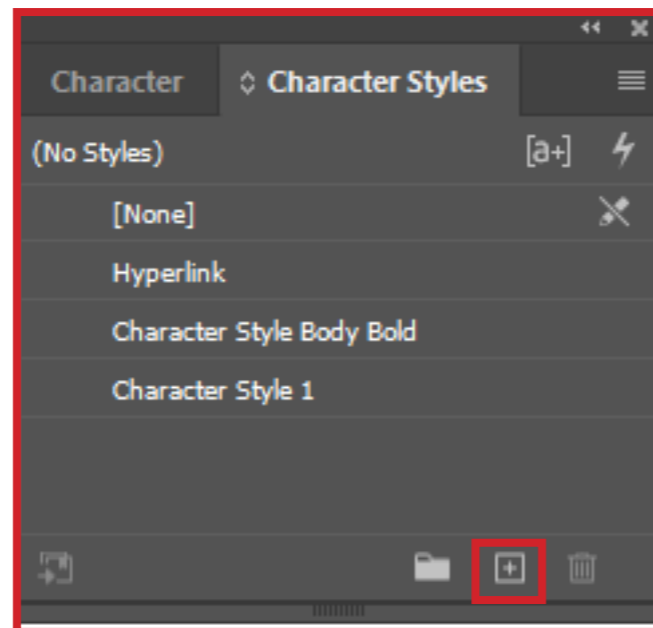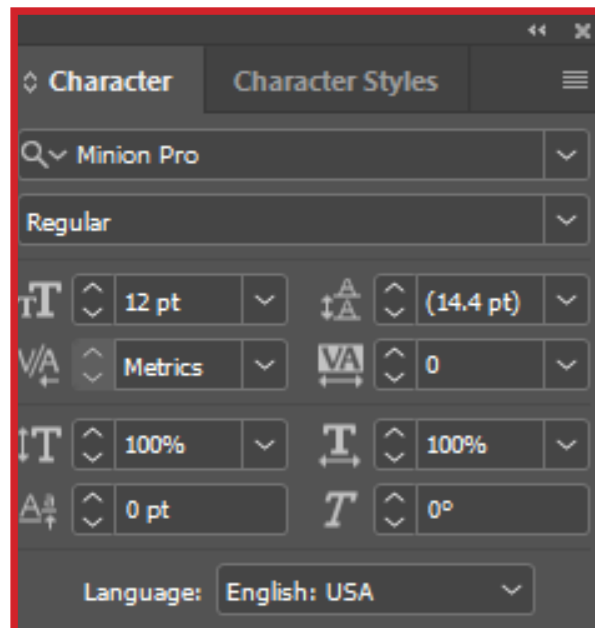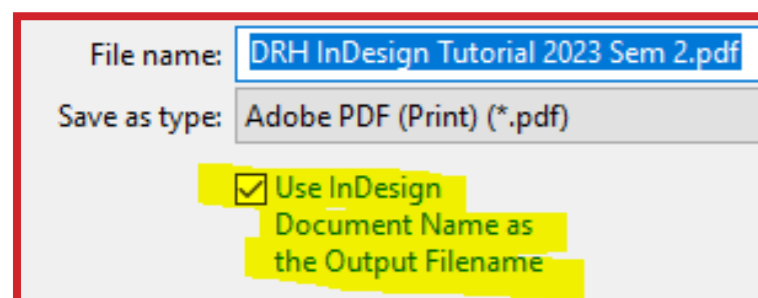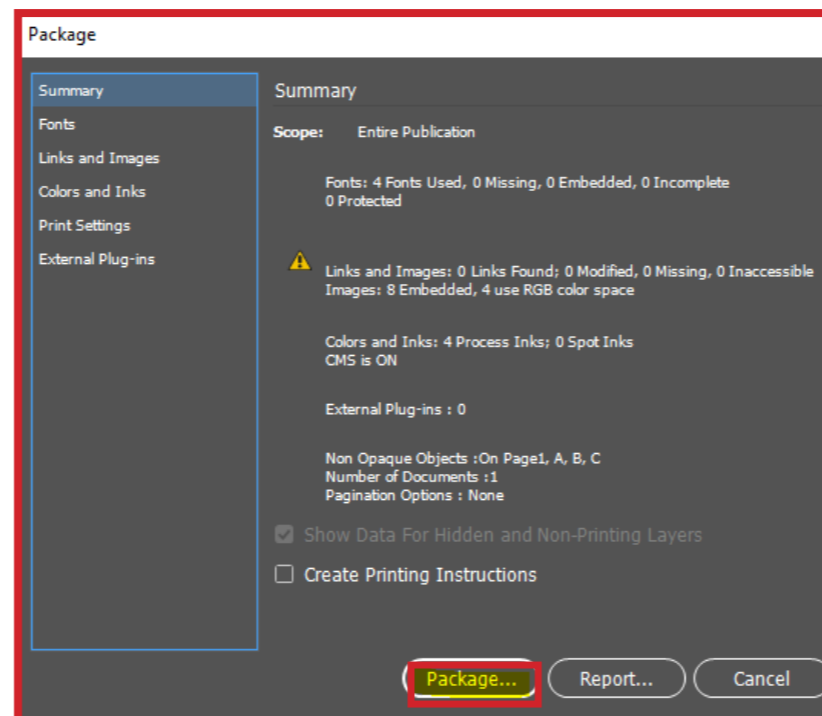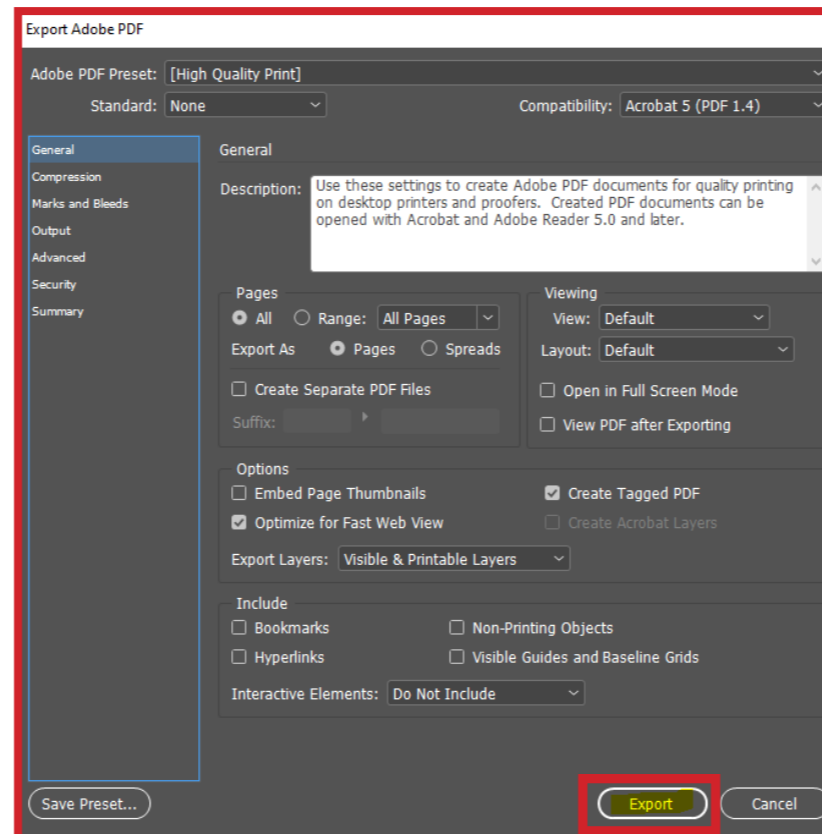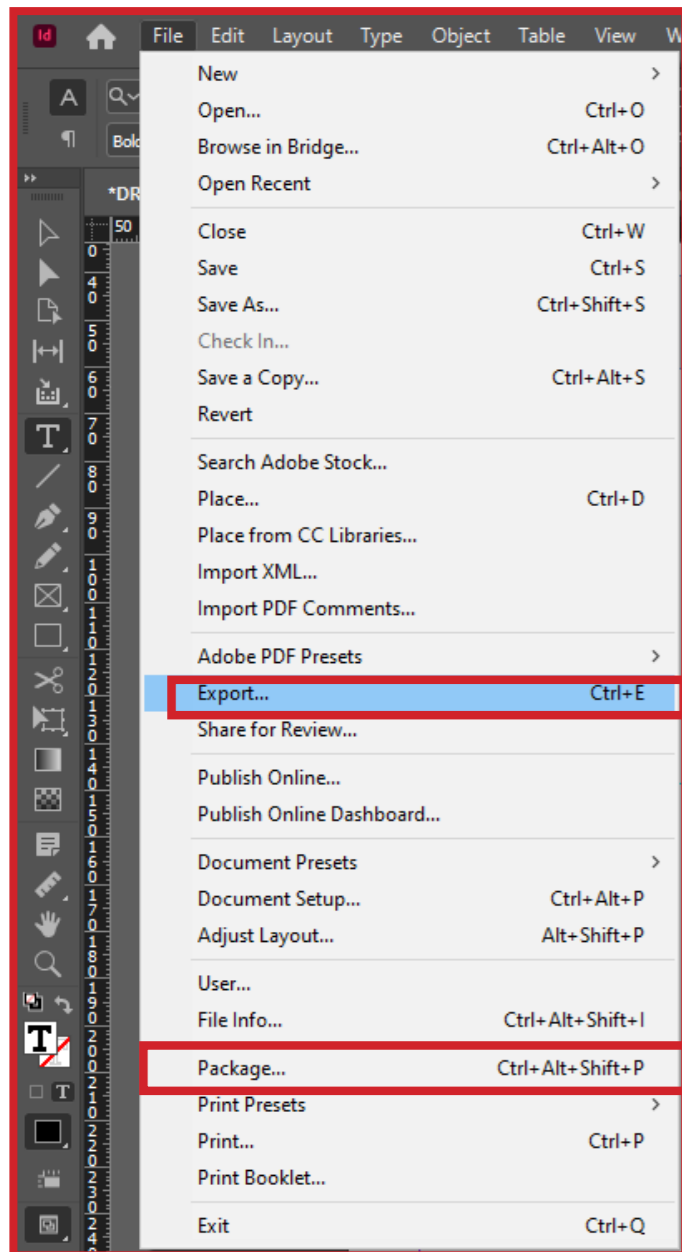
Font size:

Main Headings:
- A1 paper: 48-72 points
- A3 paper: 24-36 points

Subheadings:
- A1 paper: 36-48 points
- A3 paper: 18-24 points

Body Text:
- A1 paper: 18-36 points
- A3 paper: 12-24 points

Export/Package File

Export to PDF:

- Choose **File** > **Export**.

- Specify a name and location for the file.

- Select **Use InDesign Document Name As The Output Filename**, if you want the exported PDF to have the same name as the name of the document from the next export.

- To use a predefined set of job options, choose a preset from the Adobe PDF Preset menu.

- Click **Export**.

How to Package InDesign File.

When you save or share an InDesign file, be sure to send all linked graphics and necessary fonts along with the project file. Use the Package command to copy the InDesign (INDD) document, fonts used, and any linked graphics:

- Go to **File** > **Package** > **Package**...

- Tick boxes that apply and it will create a folder with all links/fonts/graphics from the InDesign file.

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