InDesign CC 2014 Intermediate Skills

Adobe InDesign Creative Cloud 2014

University Information Technology Services

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Adobe InDesign Creative Cloud 2014

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Introduction

InDesign is a page design and layout tool by Adobe. This booklet is designed to introduce you to the intermediate skills you will need to get started using some of the basic InDesign tools. These instructions were created using InDesign CC 2014 for Windows; the Mac OS X version is similar.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Create master pages and linking
- Use styles to quickly apply the same formatting
- Place and edit tables
- Apply effects to objects
- Change the corners and stroke of an object
- Place and thread text
- Create layers to organize your content

Master and Regular Pages

Master pages are used to build a template for your document. Pages are used to link your master pages and to add your regular content.

Pages Panel

You can easily create and manage master and regular pages through the *Pages* panel. Follow these instructions to open the Pages panel.

1. Click the **Window** menu.
2. Click **Pages**.
3. The **Pages** panel will open on the *Panels* toolbar.
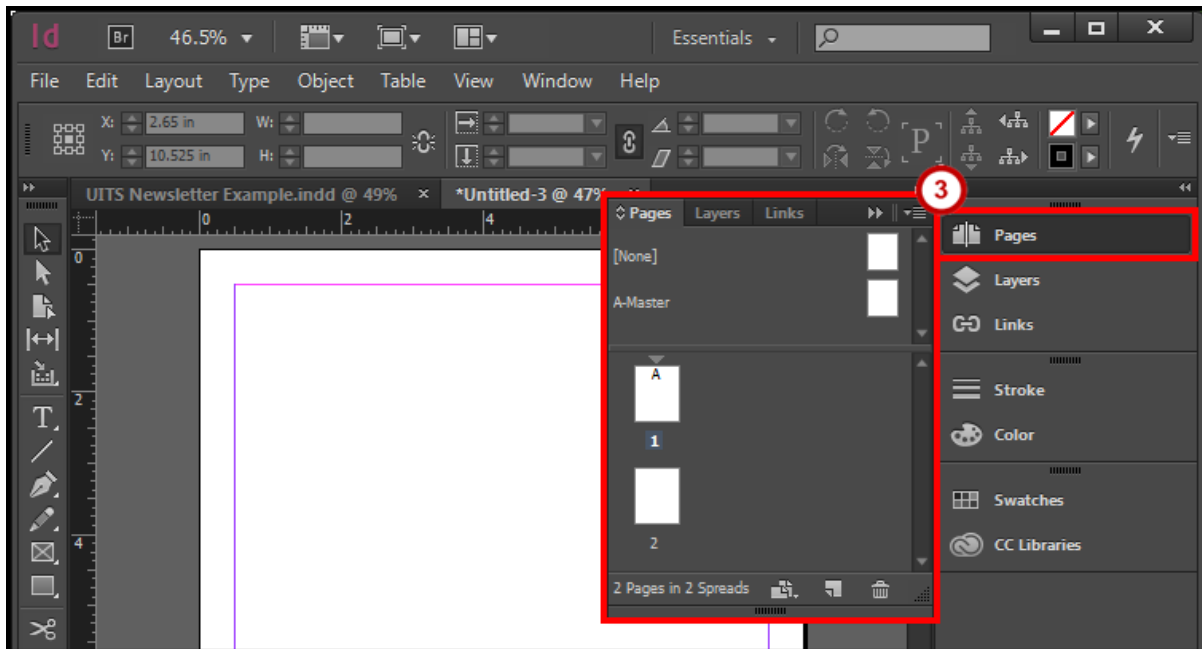

Figure 1 - Pages Panel

Create a Master Page

1. Open the **Pages** panel from the *Panels* toolbar. The *Pages* panel will appear.
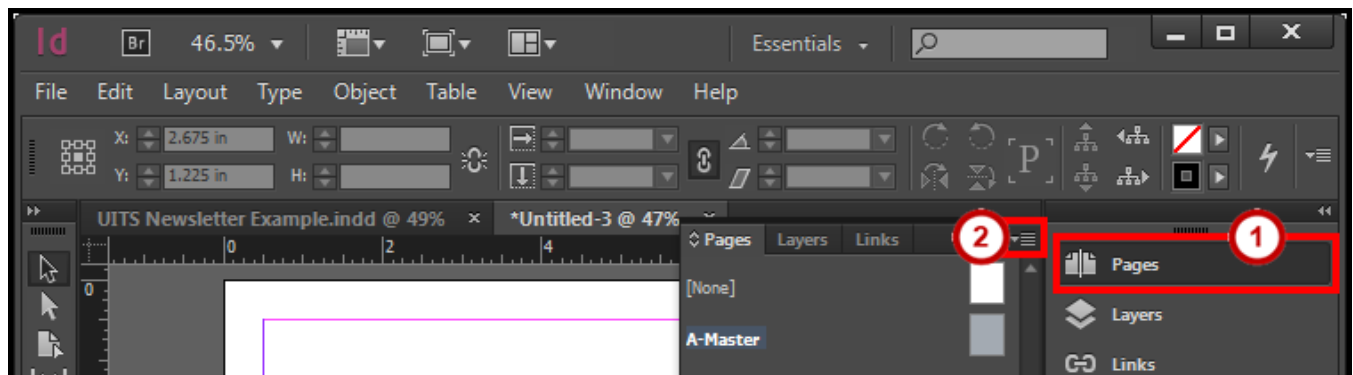2. Click on the **Pages panel options menu**.

Figure 2 - Pages Panel Options Menu

3. Click **New Master**. A *New Master* dialog window will appear.
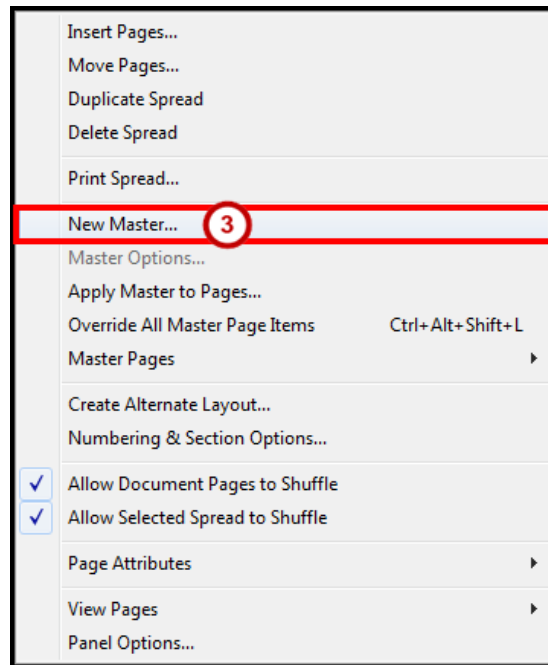
Figure 3 - New Master

4. From the *New Master* dialog window, set the following options:
   a. **Prefix** - Helps identify which master page is linked to a page.
   b. **Name** - Choose a Name for your master.
   Note: You can change the name to help distinguish different Master pages or leave it as *Master*.
   c. **Number of Pages** - How many master pages you want created.
   d. **Page Size** - What size do you want the master page.
5. Click the **OK** button.
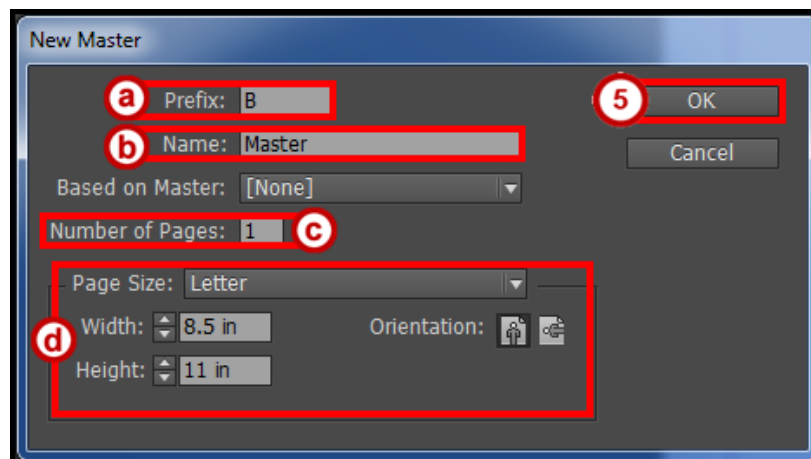
Figure 4 - New Master Dialog Window

Note: Master pages are noted by a prefix (e.g. A-Master, B-Master, etc.). These prefixes help identify which master page is linked to a page. Go to Apply a Master Page to see how to set this up.

Edit a Master Page

1. Open the **Pages** panel from the *Panels* toolbar. The *Pages* panel will appear.
2. **Double Click** the *master page icon* to open the page for editing.

Figure 5 - Edit Master Page

Note: You can also select the master page for the drop-down at the bottom of the document window.

Figure 6 - Select Master Page Drop-down

Apply a Master Page

1. Open the **Pages** panel from the *Panels* toolbar. The *Pages* panel will appear.
2. **Left Click** on a *page icon*.
3. Click on the **Pages panel options menu**.
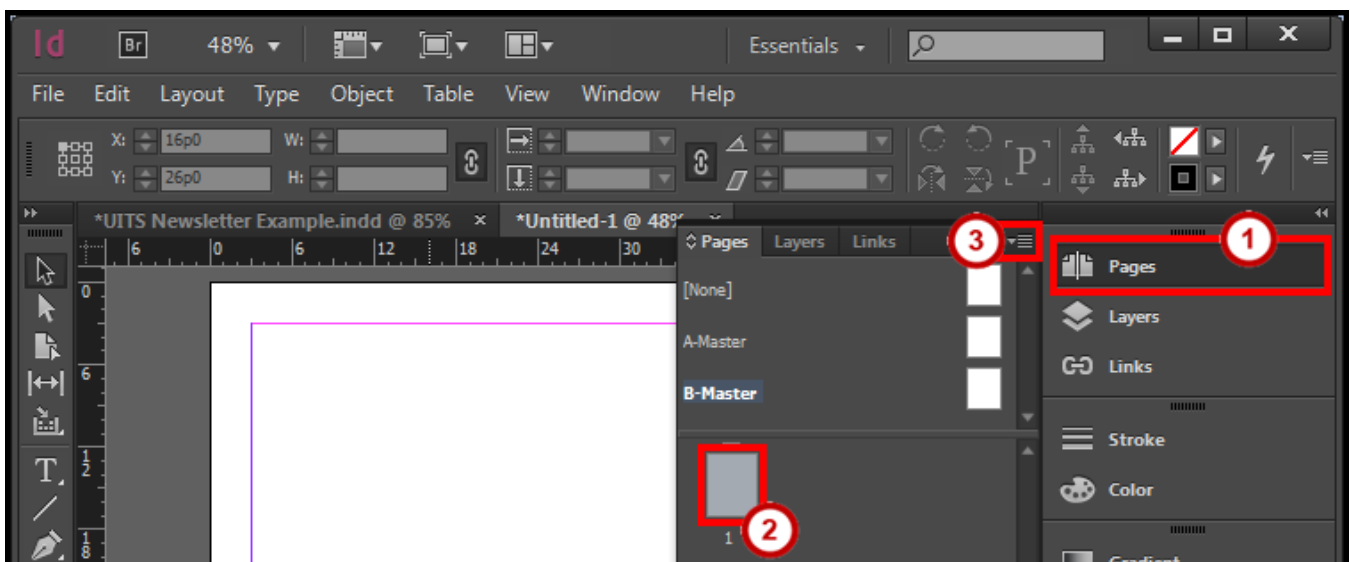
Figure 7 - Select a Page

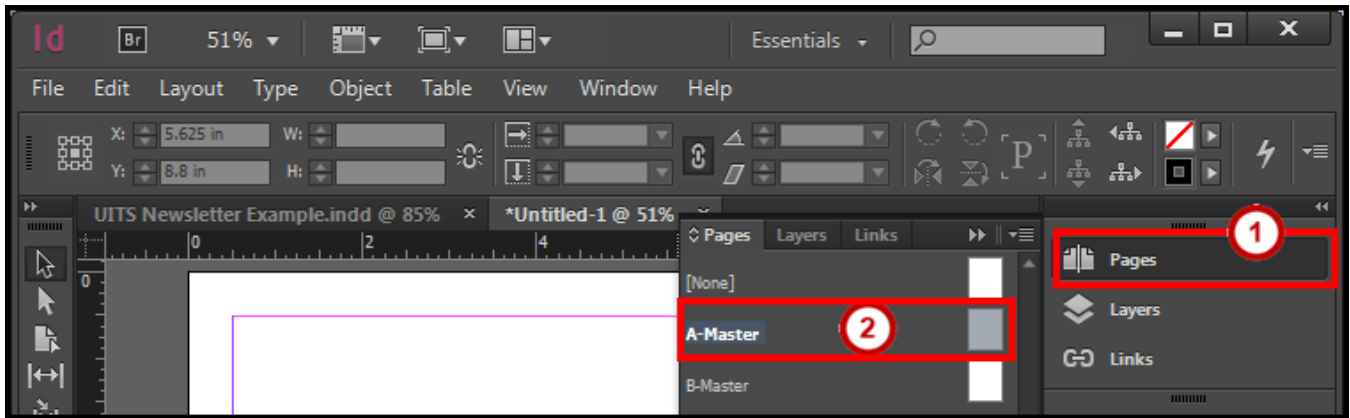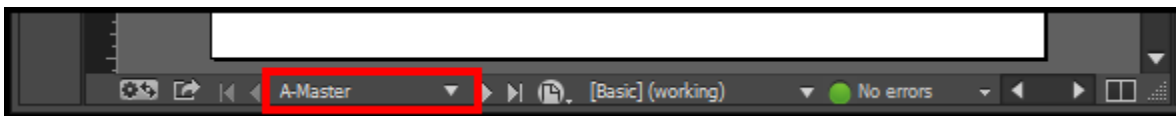4. Click **Apply Master to Pages**. An *Apply Master* dialog window will appear.
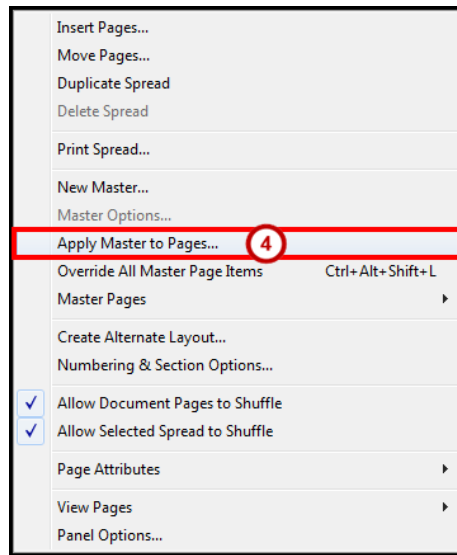
Figure 8 - Apply Master to Pages

5. From the *Apply Master* dialog window, set the following options:
   a. **Apply Master** - Select the Master Page to apply to the page(s).
   b. **To Pages** - Select the page(s) to apply the master page to.
6. Click the **OK** button.

Figure 9 - Apply Master Dialog Window

Note: When a master page is applied to a page, you will see the *Prefix* of that master page on the page icons (e.g. A, B, C, etc).
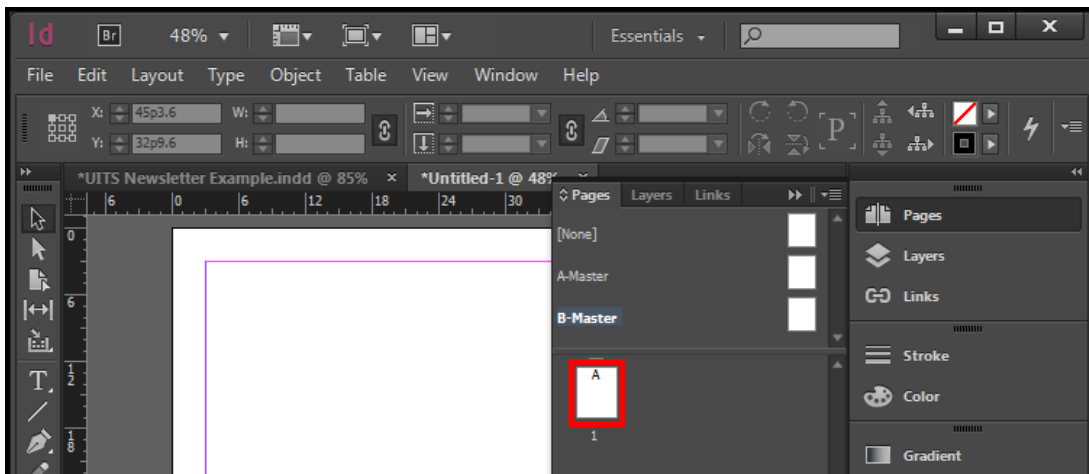
Figure 10 - Master Page Applied

Text

Text reside in objects called *Text Frames*. Using the *Type Tool*, you can edit the characters individually or an entire paragraph. You can also use *Story Editor* to easily type or edit the text all in this window.

Create a Text Frame
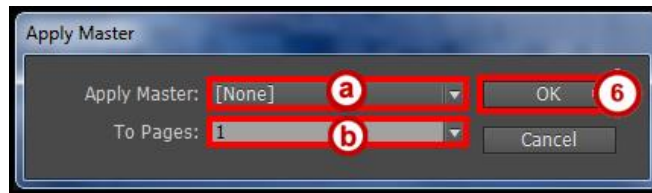
1. From the *Tools Panel*, click the **Type Tool**.

Figure 11 - Type Tool

2. **Left click and hold** anywhere on the document, then **draw** your *Text Frame*.

Figure 12 - Draw Text Frame

3. After you have the desired size of the *Text Frame*, let go of the **Left Click**. Your *Text Frame* is drawn and you can now start typing.

Figure 13 - Text Frame

Resizing the Text Frame

1. From the *Tools Panel*, click the **Selection Tool**.
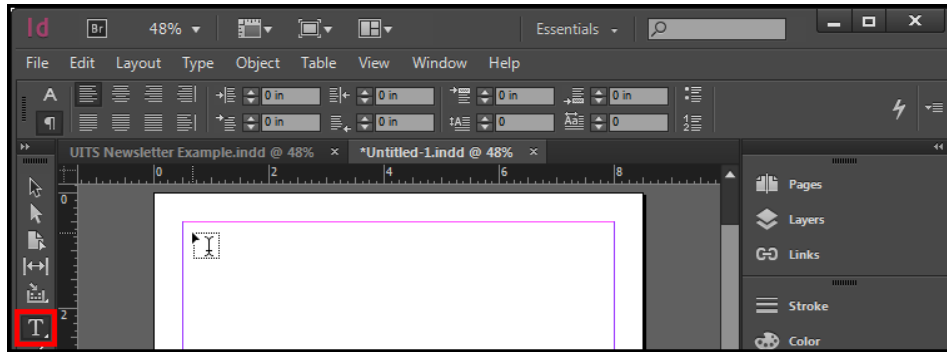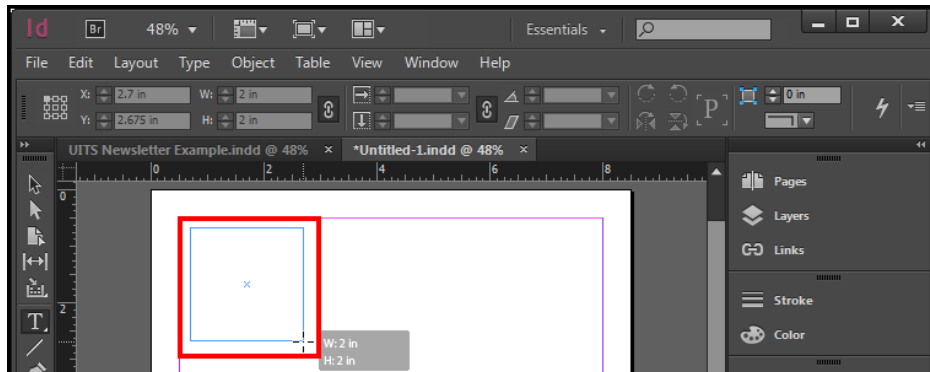2. On the document, **left click** the *Text Frame*.

Figure 14 - Selection Tool

3. There are two ways you can change the size of the *Text Frame*.
   a. **Left click and hold** the sizing handles, then **drag** inward or outward.
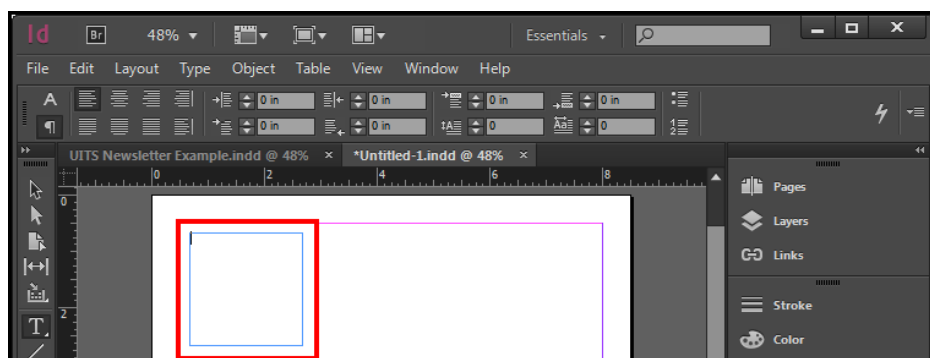   b. From the *Control Bar*, change the **Width** and/or **Height**.
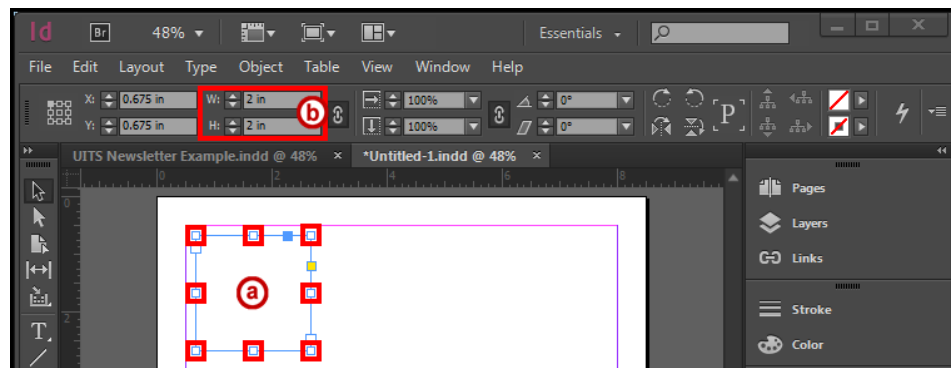
Figure 15 - Resize Text Frame

Formatting the Text Frame

1. From the *Tools Panel*, click the **Selection Tool**.
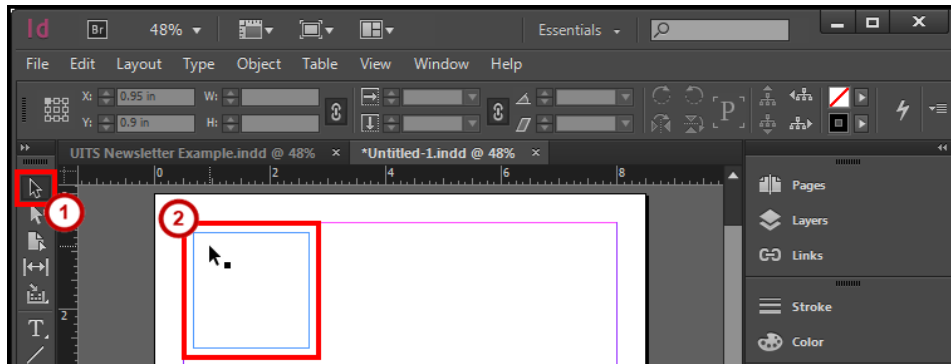2. On the document, **left click** the *Text Frame*.
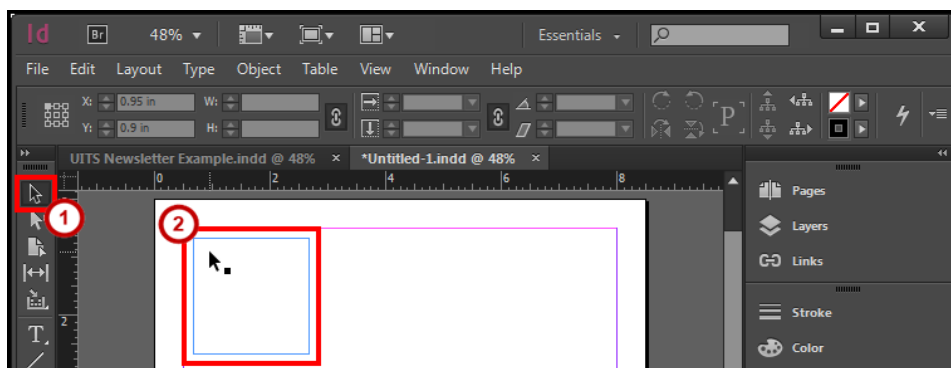
Figure 16 - Selection Tool

3. Click the **Object** menu.
4. Click **Text Frame Options**. The *Text Frame Options* dialog window will appear.
5. From the *Text Frame Options* dialog window, you have the following options.
    a. **General** - Create columns, insert spacing on the outer edges, set a vertical justification, and ignore text wrap.
    b. **Baseline Options**
    c. **Auto-Size**
6. Check the **Preview** box to see what your changes will look like before applying.
7. Click the **OK** button.
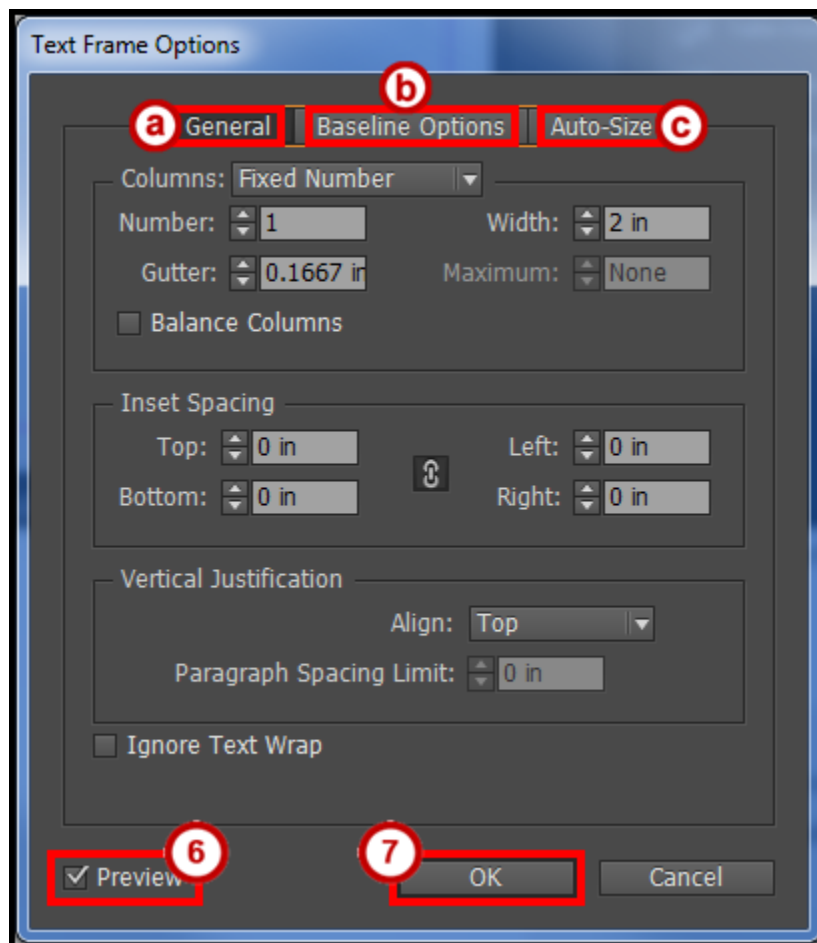
Figure 17 - Text Frame Options Dialog Window

Placing Text from another Document

If you already have text in a document or spreadsheet, you can easily import it into InDesign. You can import Microsoft Word Documents, .rtf files, text files, and Microsoft Excel spreadsheets.

Note: If you have a frame selected, this action will replace the contents in that frame or if you have the insertion point in the text frame this action will add the text to that frame.

1. Click the **File** menu.
2. Click **Place**.
3. In the *Place* window, find and select your document and click the **Open** button.

Figure 18 - Find and Place Document

4. The pointer shows the text from the document you opened ready to be placed.

Figure 19 - Text on Pointer

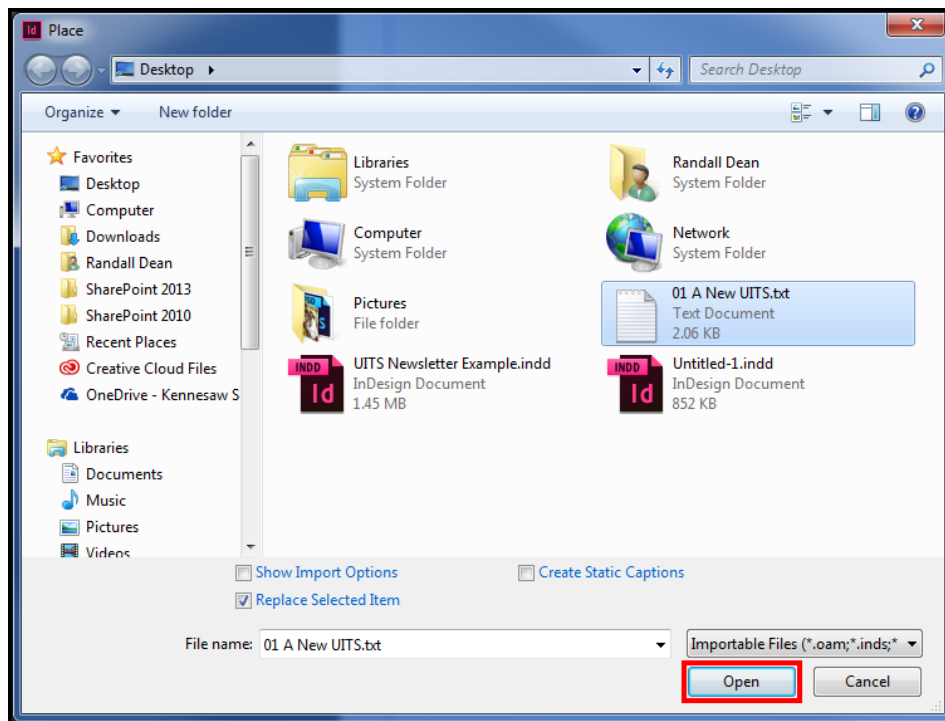5. On the document, **left click and hold**, then **draw** your *Text Frame*.

Figure 20 - Draw Text Frame

6. After you have the desired size of the *Text Frame*, let go of the **Left Click**. Your *Text Frame* is drawn and you text is placed in that frame.

Figure 21 - Placed Text in a Frame

Note: If you have a *red plus sign* this indicates there is more text in the frame. The text frame size needs to be increased or you can thread (link text frames) the text to flow between them.
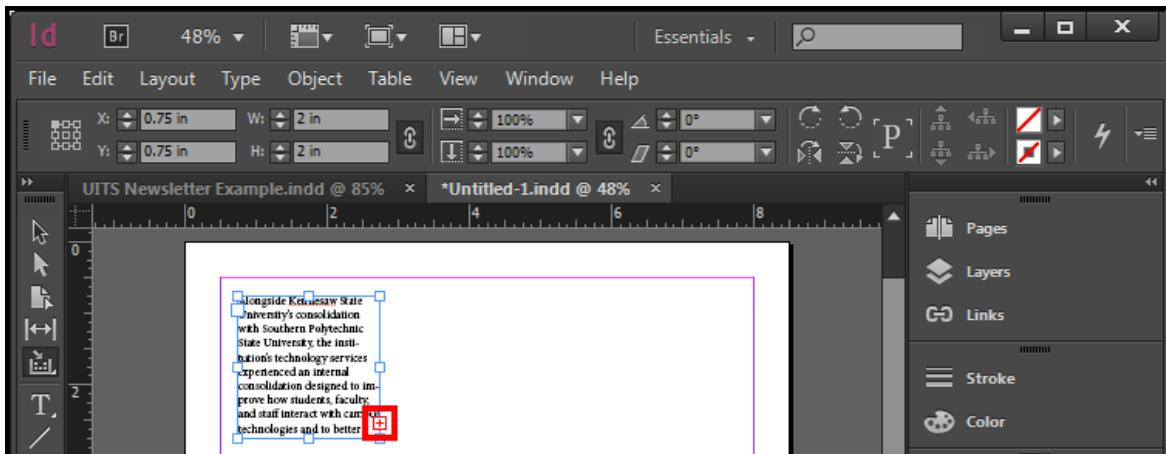
Figure 22 - Text Frame Red Plus Sign

Text Threading

1. From the *Tools Panel*, click the **Selection Tool**.
2. On the document, **left click** the *Text Frame*.
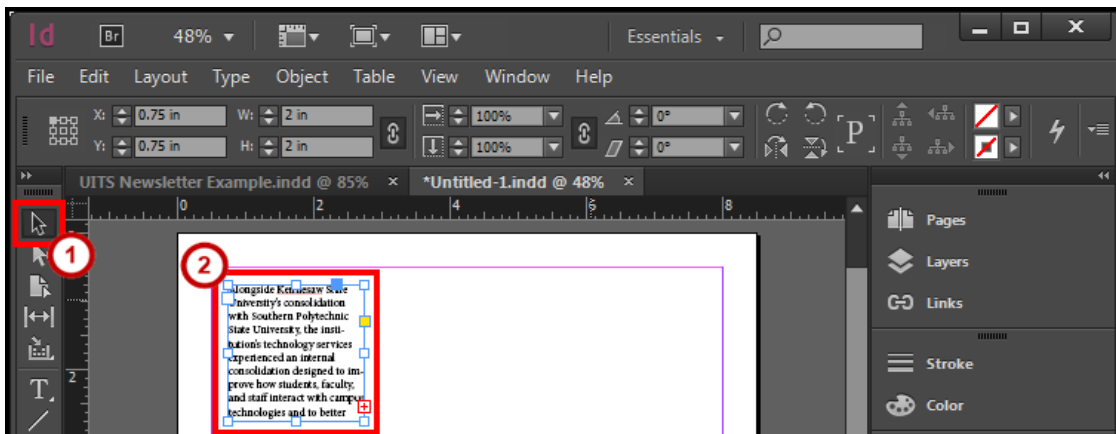
Figure 23 - Select Text Frame

3. On the *Text Frame*, click the **red plus sign**.
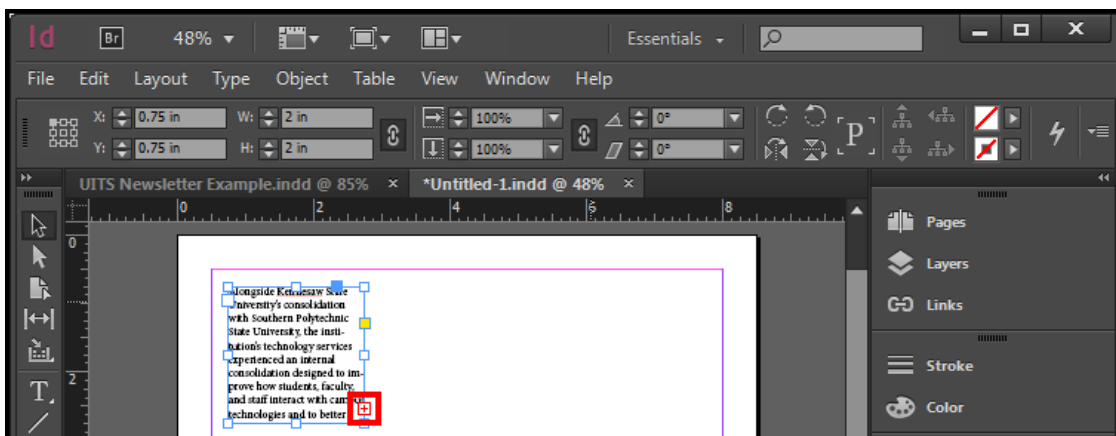
Figure 24 - Red Plus Sign on Text Frame

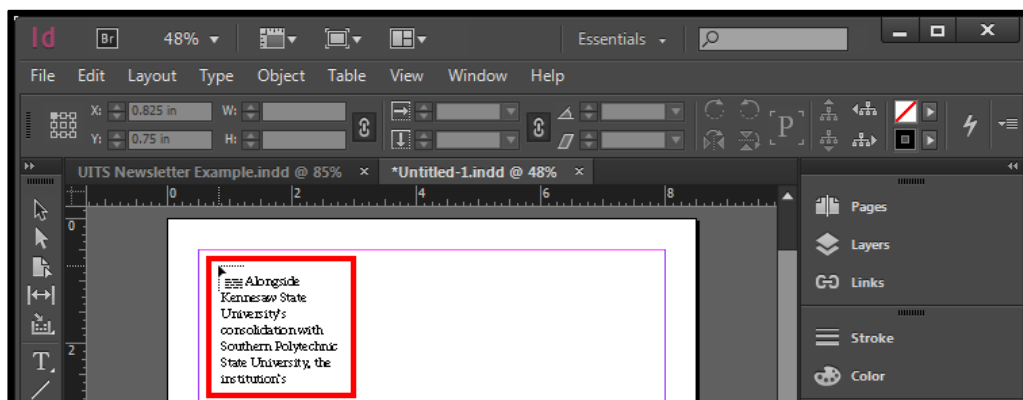4. The pointer shows the text from the text frame ready to be placed.
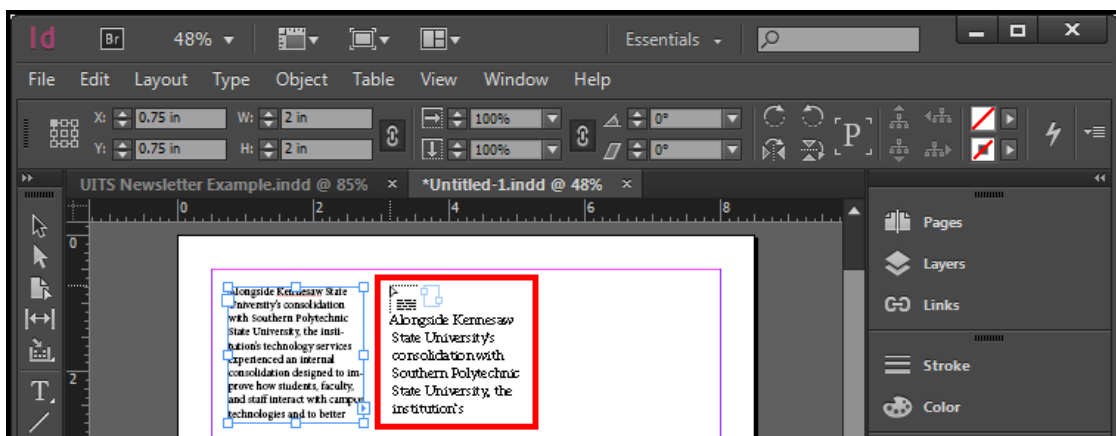
Figure 25 - Text on Pointer

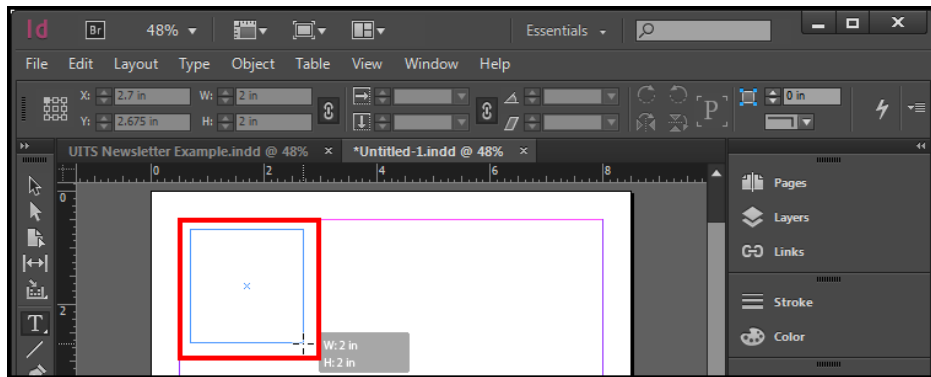5. On the document **left click and hold**, then **draw** your *Text Frame*.
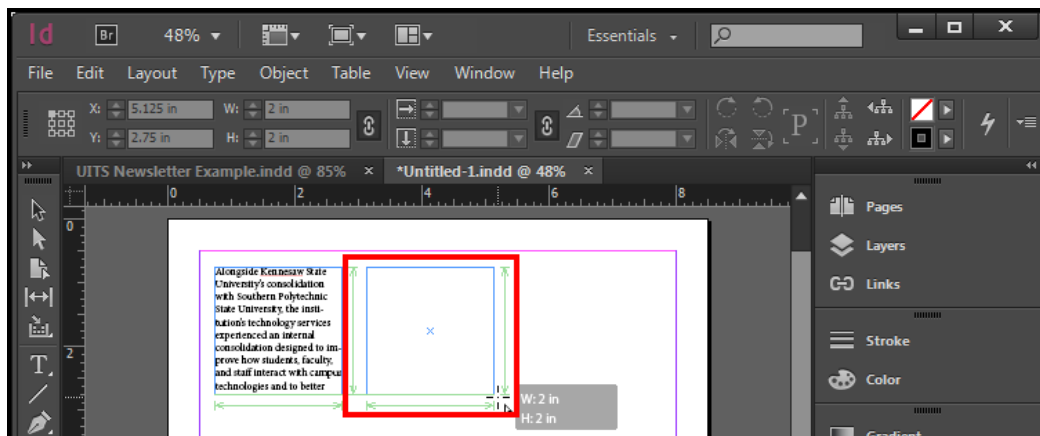
Figure 26 - Draw Text Frame

6. After you have the desired size of the *Text Frame*, let go of the **Left Click**. Your *Text Frame* is drawn and you text is placed and linked in that frame to the other frame.
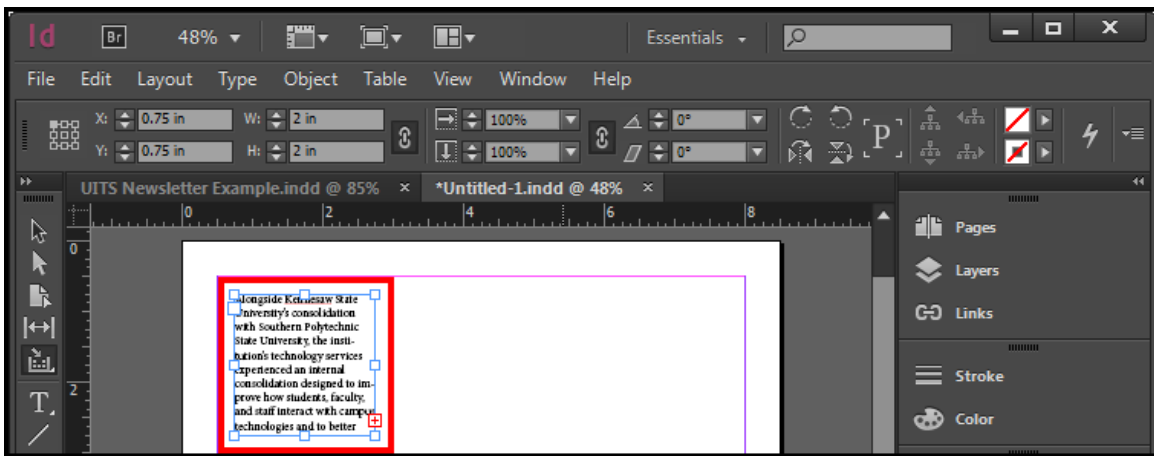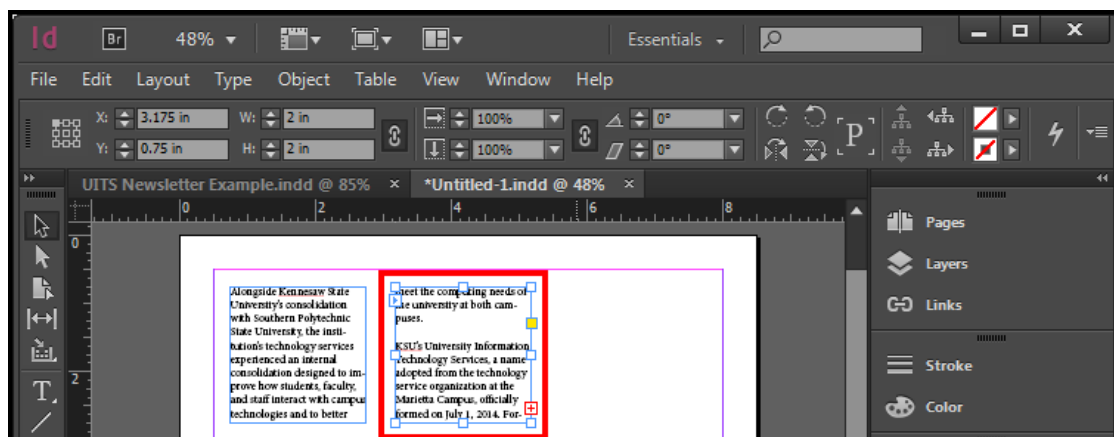

Figure 27 - Linked Text in a Text Frame

Tabs

1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
3. Click the **Type** menu.
4. Click **Tabs**. The *Tabs* dialog window will appear.

5. From the *Tags* dialog window, you have the following options:
    a. **Tab Alignment buttons** - Choose either left, right, center, or decimal alignment.
    b. **Tab Position** - Tells you the exact position of where the selected tab is at on the page.
    c. **Tab Leader box** - A tab leader is a repeated pattern of characters.
    d. **Align On box** - Type the character you want to align on with the decimal alignment.
    e. **Tab ruler** - Shows the page width.
    f. **Snap above frame** - Snaps Tabs dialog window to text frame.
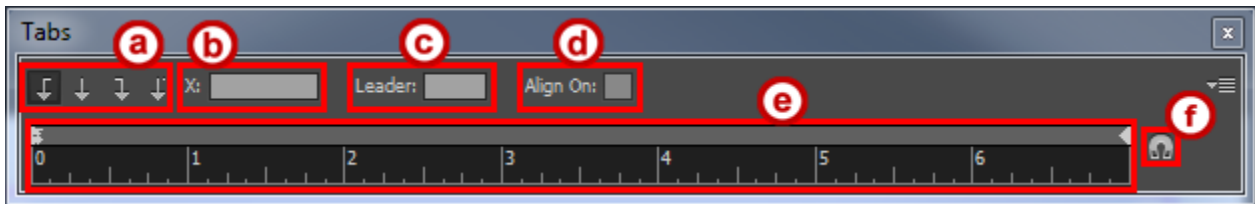
Figure 28 - Tabs Dialog Window

Add a Tab Alignment

1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
3. Click the **Type** menu.
4. Click **Tabs**. The *Tabs* dialog window will appear.
5. Select a **Tab Alignment**.
6. Click on the **Tab Ruler** to place your *Tab*.

Note: If you place the tab in the wrong location, you can move the *Tab* by **left-clicking and holding** then **dragging** to the left or right.
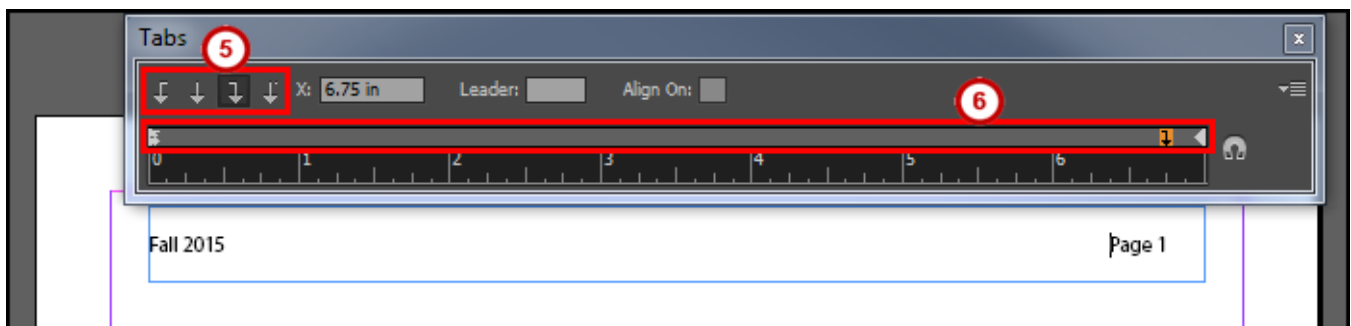
Figure 29 - Add a Tab Alignment

Remove a Tab Alignment

1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
3. Click the **Type** menu.
4. Click **Tabs**. The *Tabs* dialog window will appear.
5. **Left-click and hold** the **Tab** you wish to remove.

Figure 30 - Left-Click and Hold Tab

6. **Drag away** from the *Tab Ruler* and let go of the **left-click**.

Figure 31 - Drag Away from Tab Ruler

Insert Page Numbering
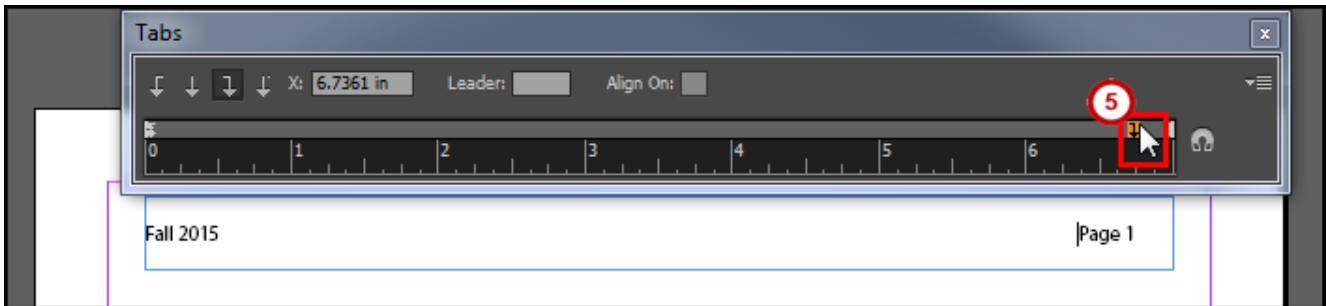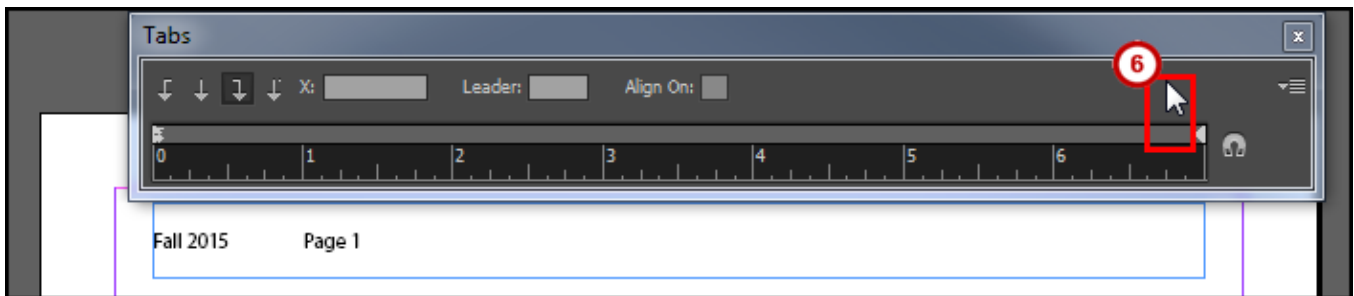
1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
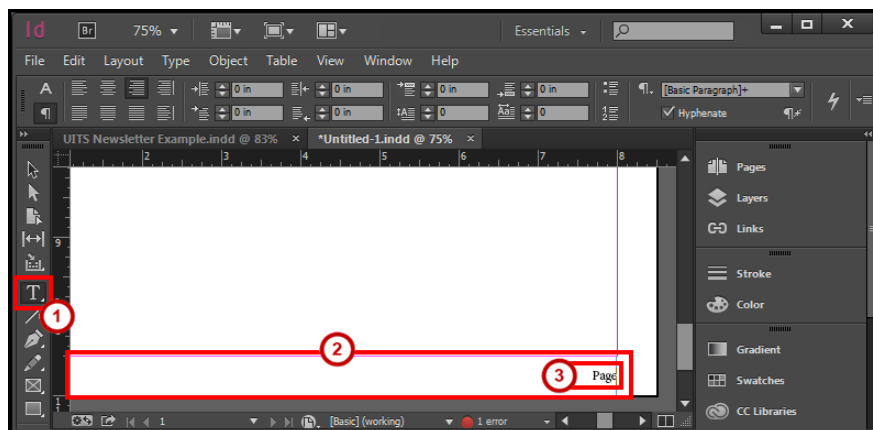3. Type the word **Page**.

Figure 32 - Create Text Frame for Page Footer

4. Click the **Type** menu.
5. Click **Insert Special Character**.
6. Click **Markers**.
7. Select the desired **Page Number** from the list.
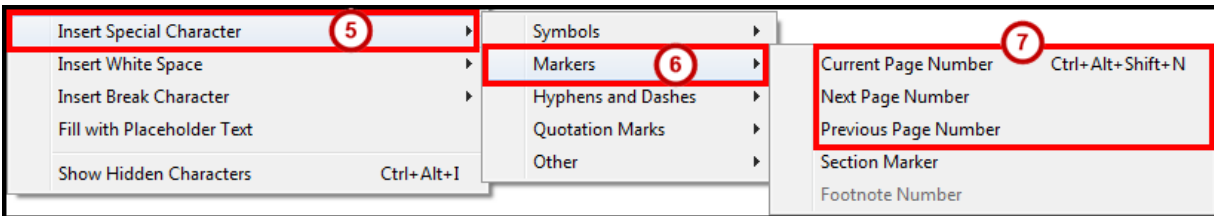
Figure 33 - Insert Page Number

Styles

Styles can apply all different types of formatting with a single click. You can create styles for characters, paragraphs, objects, cells, and tables.

Paragraph Style

This style will apply formatting to the paragraphs that you select.

Create a Paragraph Style

1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
3. **Click inside the paragraph** you want to create a *Paragraph Style*.

Note: Make sure your formatting is setup before creating a *Paragraph Style*.

Figure 34 - Click Inside the Formatted Paragraph

4. Click the **Window** menu.
5. Click **Styles > Paragraph Styles**. The *Paragraph Styles* panel will open.

6. In the *Paragraph Styles* panel, click on the **Paragraph Styles panel options** menu.

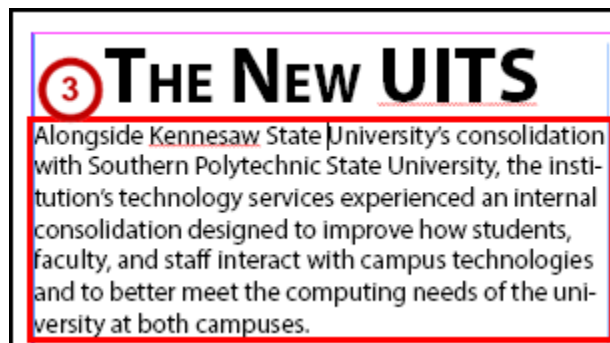**Figure 35 - Paragraph Styles Panel**

7. Click **New Paragraph Style**. A *New Paragraph Style* dialog window will appear.
8. From the *New Paragraph Style* dialog window, set the following options:
    a. **Style Name** - Choose a name for you style.
    b. **Style Settings** - Add or change formatting to your style.
    c. **Style Settings Review** - Review the current formatting you have selected.
    d. **Apply Style to Selection** - Apply the *New Paragraph Style* to the current selection.
9. Check the **Preview** box to see what your changes will look like before applying.
10. Click the **OK** button.
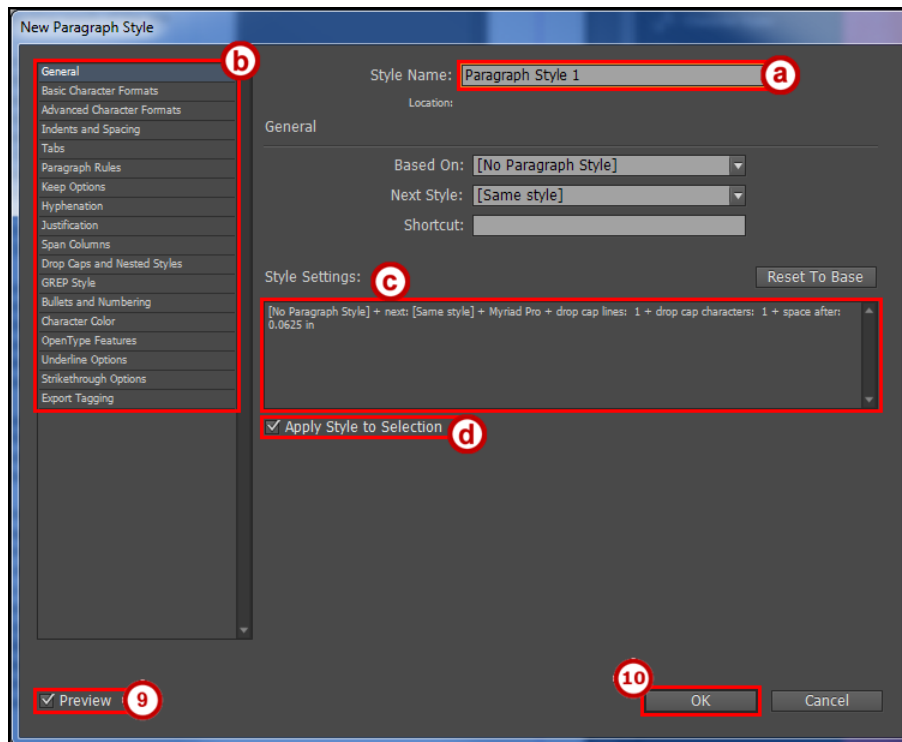
Figure 36 - New Paragraph Style Dialog Window

Apply a Paragraph Style

1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
3. **Click inside the paragraph** you want to apply a *Paragraph Style*.
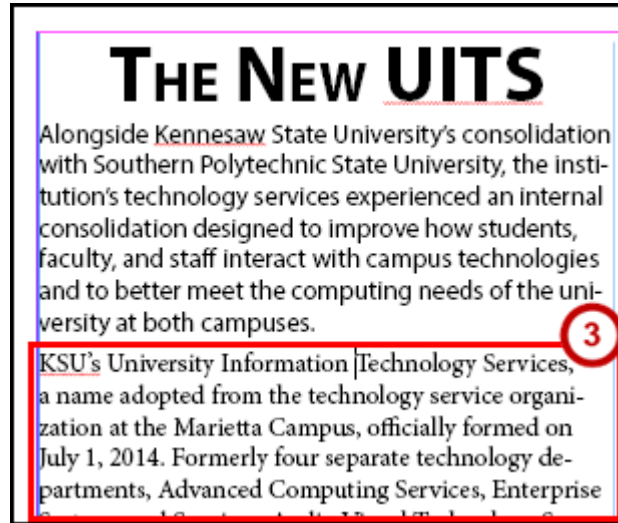
Figure 37 - Click Inside the Non-Formatted Paragraph

4. Click the **Window** menu.
5. Click **Styles > Paragraph Styles**. The *Paragraph Styles* panel will open.
6. In the *Paragraph Styles* panel, click on a **Paragraph Style** to apply formatting.
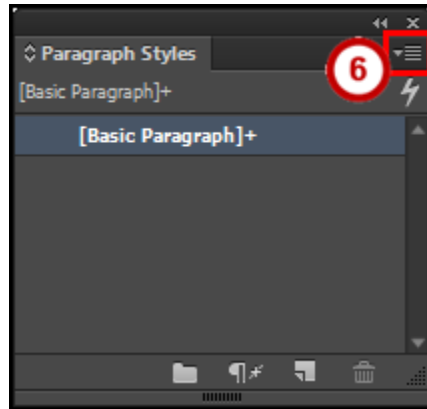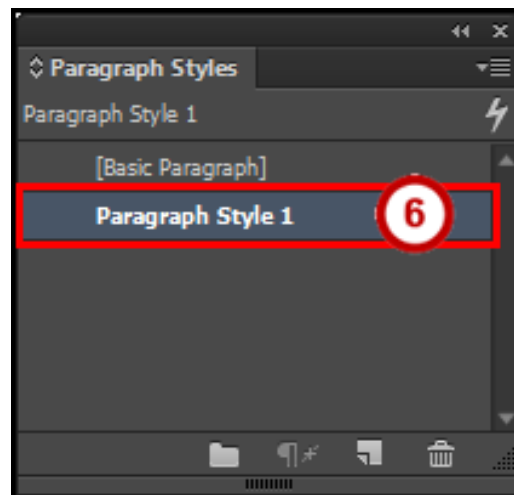

Figure 38 - Apply a Paragraph Style

Tables

Tables help to organize a lot of information on a page to make it readable.

Create a Table

1. Click the **Table** menu.
2. Click **Create Table**. The *Create Table* dialog window will open.
3. From the *Create Table* dialog window, set the following options.
   a. **Body Rows** - Number of rows to create.
   b. **Columns** - Number of columns to create.
   c. **Header Rows** - Number of header rows to repeat information if the table continues to another frame.
   d. **Footer Rows** - Number of footer rows to repeat information if the table continues to another frame.
4. Click the **OK** button.

Figure 39 - Create Table Dialog Window

5. **Left click and hold** anywhere on the document, then **draw** your *Table*.

Note: A *text frame* is drawn and places the table within the frame.

Figure 40 - Draw Table

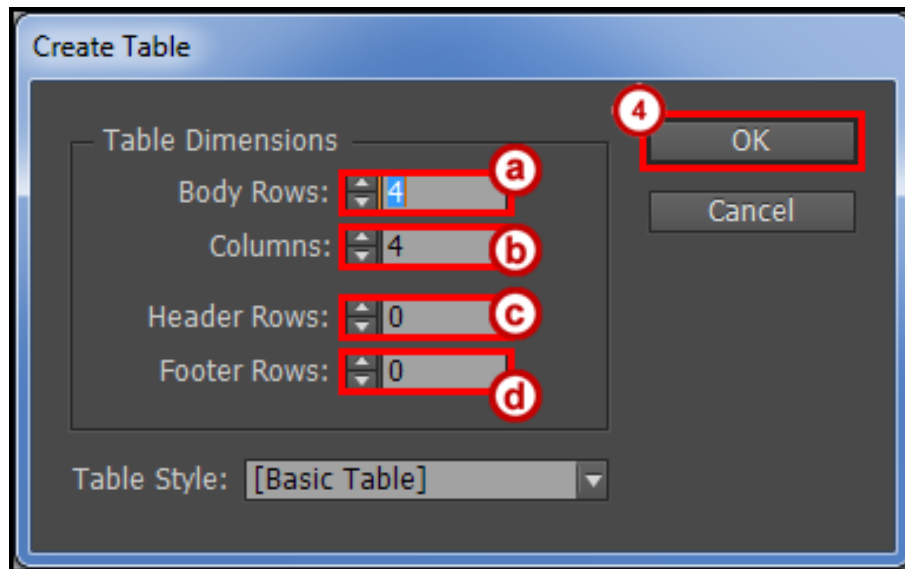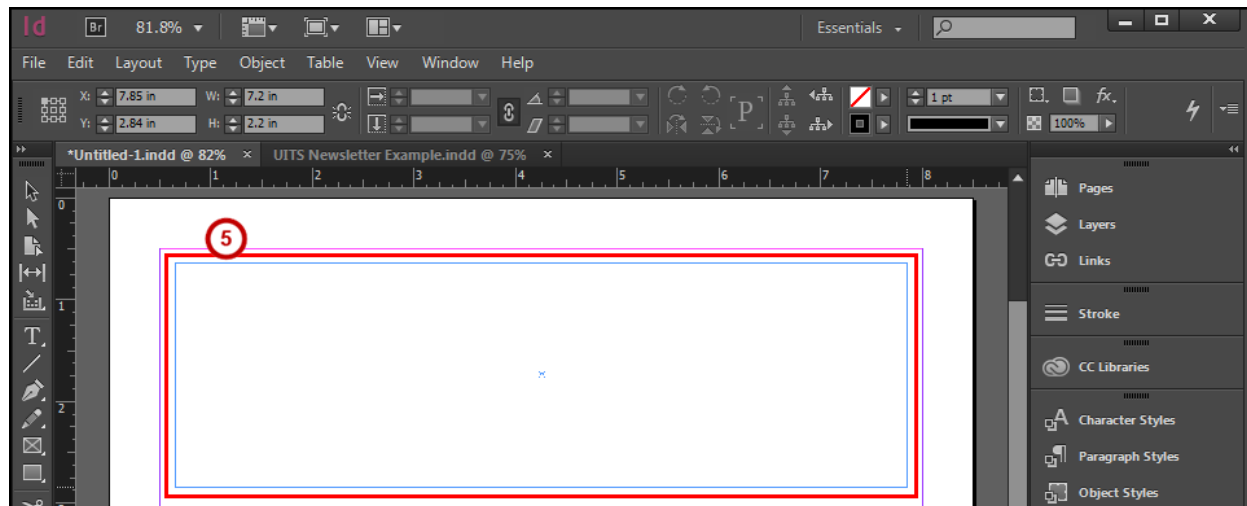6. After you have the desired size of the *Table*, let go of the **Left Click**. Your *Table* is drawn and you can now start typing.
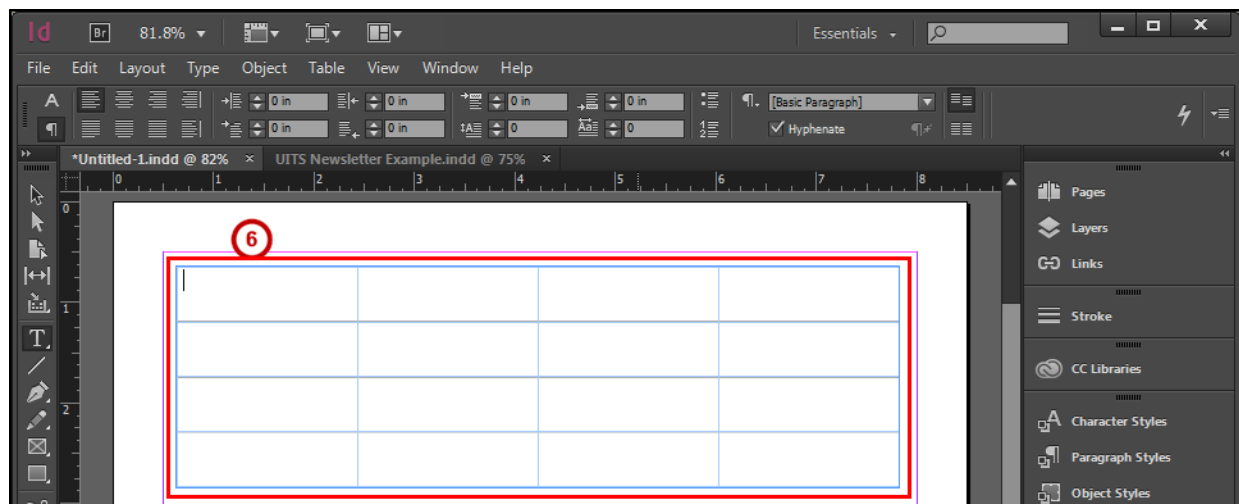

Figure 41 - Table Frame

Edit a Table

1. From the *Tools Panel*, click the **Selection Tool**.
2. On the document, **left click** the *Table*.
3. Click the **Table** menu.
4. Click **Table Options > Table Setup**. The *Table Options* dialog window will open.

5. From the *Table Options* dialog window, you have the following options.
    a. **Table Setup** - Change the amount of rows or columns, add a border color, create some spacing, etc.
    b. **Row Strokes** - Add strokes to the rows.
    c. **Column Strokes** - Add strokes to the columns.
    d. **Fills** - Add fills to rows or columns.
    e. **Headers and Footers** - Change the header or footer rows.
6. Check the **Preview** box to see what your changes will look like before applying.
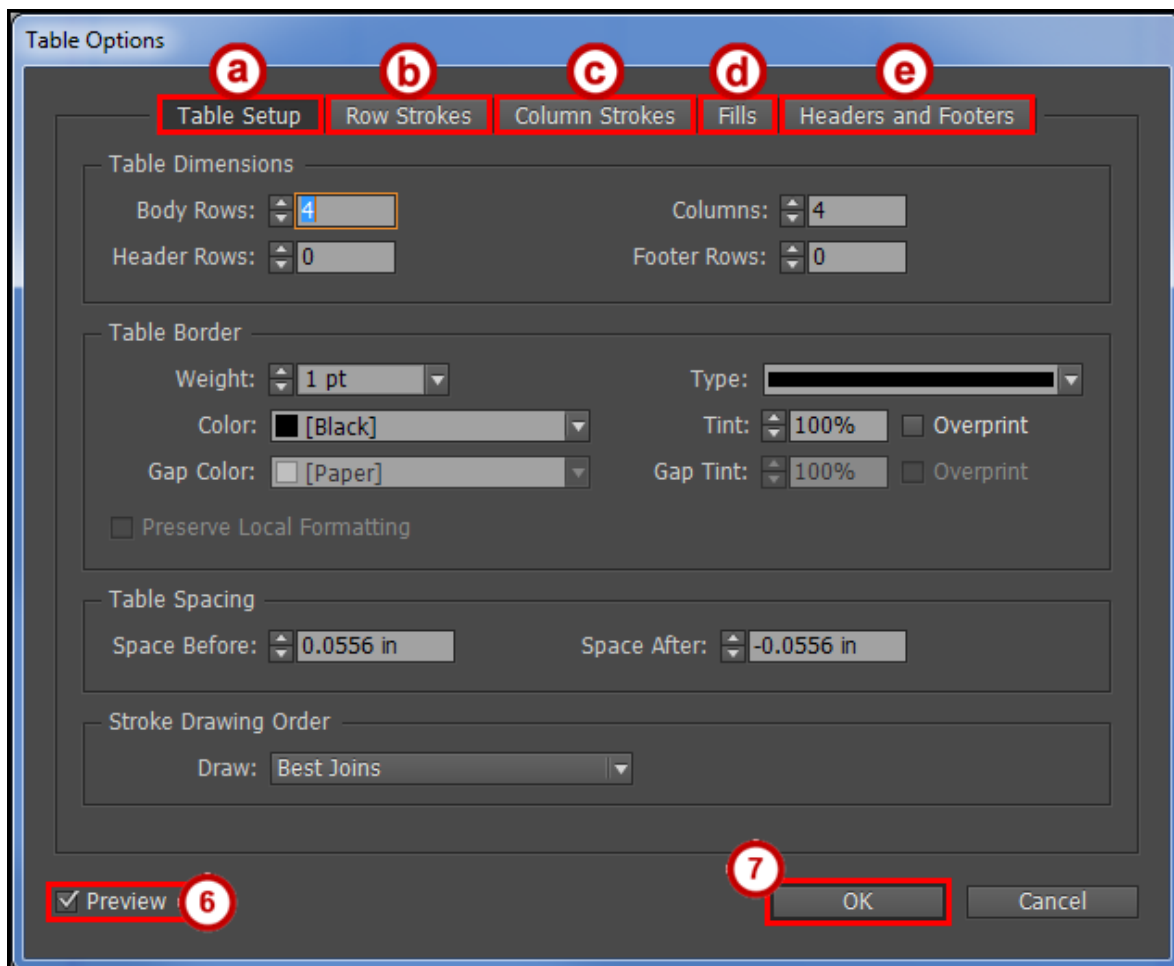7. Click the **OK** button.

Figure 42 - Table Options Dialog Window

Convert Text to Table

1. From the *Tools Panel*, click the **Type Tool**.
2. On the document, **left click** the *Text Frame*.
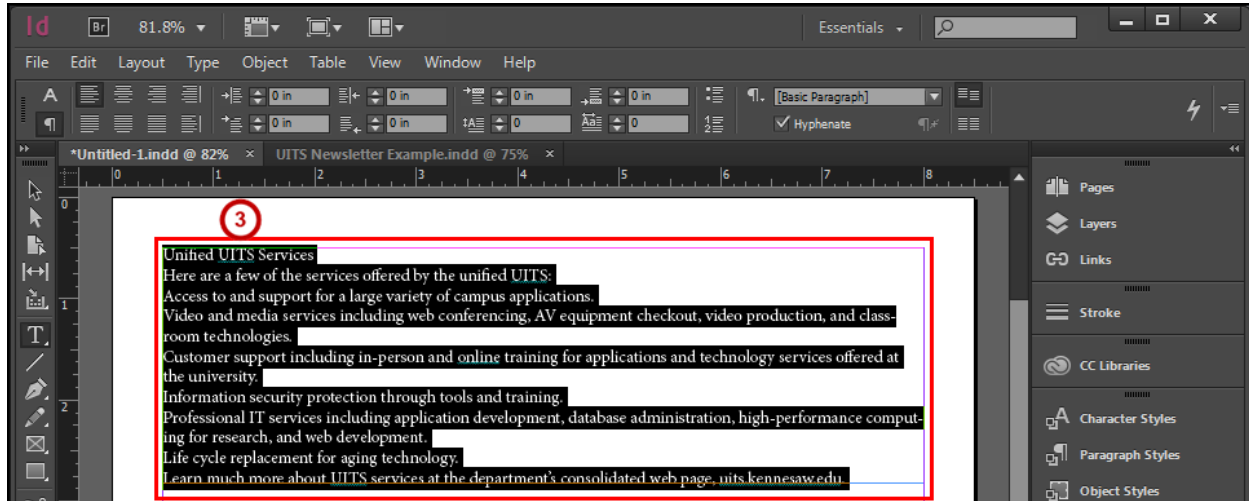3. **Select the text** you want to convert.

Figure 43 - Select Text

4. Click the **Table** menu.
5. Click **Convert Text to Table**. The *Convert Text to Table* dialog window will open.
6. From the *Convert Text to Table* dialog window, you have the following options.
   a. **Column Separator** - Determines how columns are created.
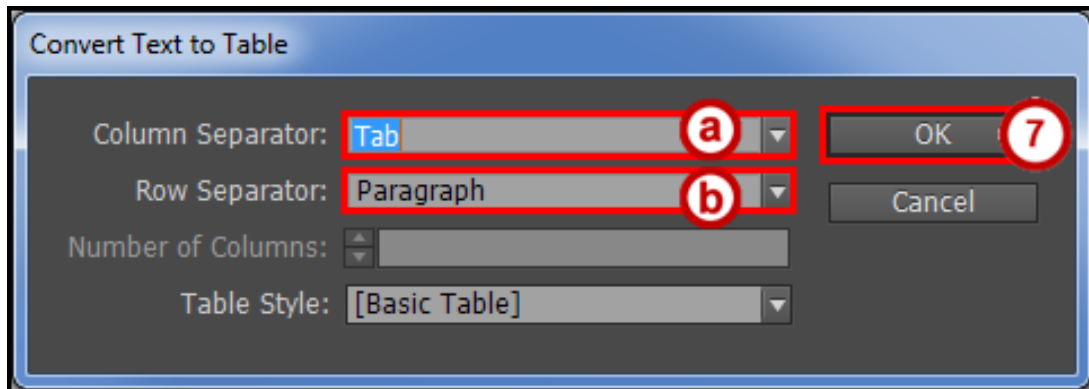   b. **Row Separator** - Determines how rows are created.
7. Click the **OK** button.

Figure 44 - Convert Text to Table Dialog Window

8. Your selected text has been converted to a table.

Note: If you don't see all your text after the conversion, you may need to resize your frame.
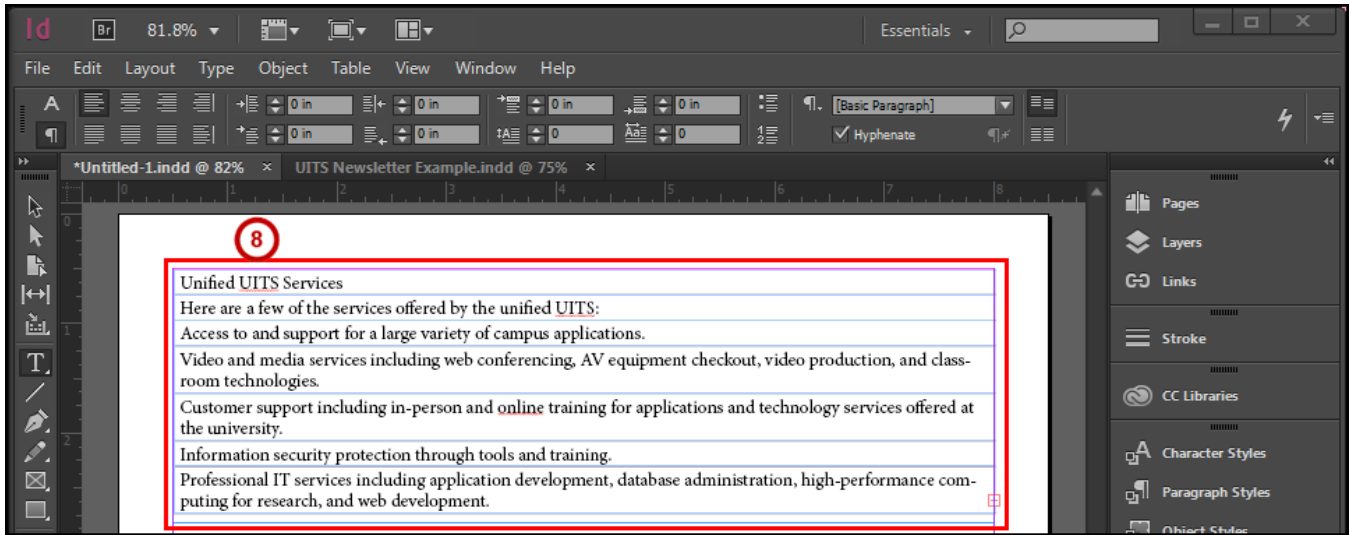

Figure 45 - Converted Text to a Table

Effects

Effects can change how an object, stroke, fill, or text look. You can apply multiple effects to a single object such as transparency, drop shadow, outer glow, etc.

Apply an Effect

1. On the document, **left click** an *Object*.
2. From the *Control Bar*, click the **Effects drop-down menu**.
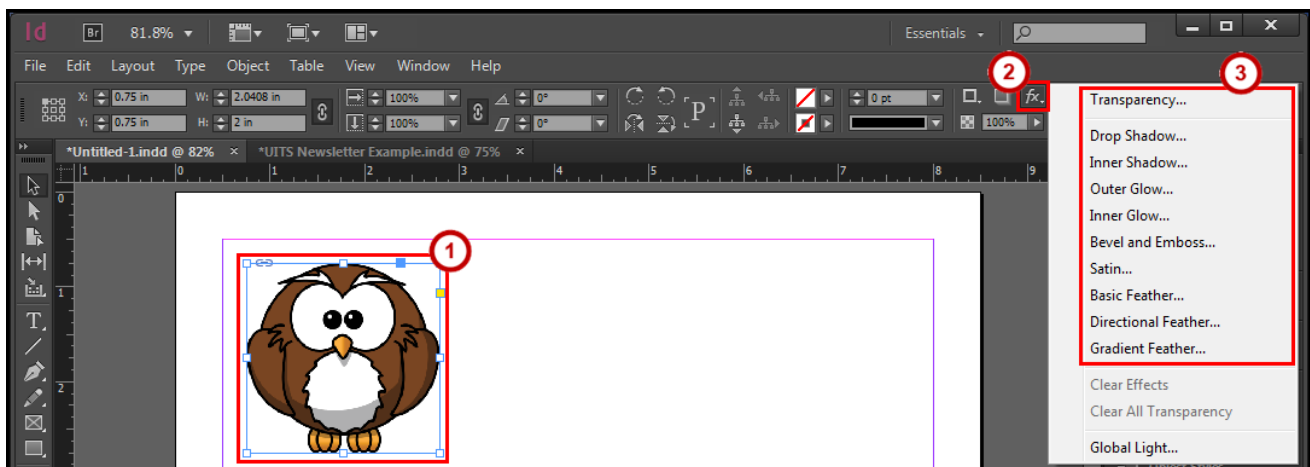3. Select an **Effect**.

Figure 46 - Select an Effect

4. From the *Effects* dialog window, you have the following options:
    a. **Settings for** - Apply an effect to an object, stroke, fill, or text.
    b. **Effect** - Choose an effect.
    c. **Effect Settings** - Change the settings of a selected effect.
5. Check the **Preview** box to see what your changes will look like before applying.
6. Click the **OK** button.

Note: Multiple *effects* can be applied to an object.
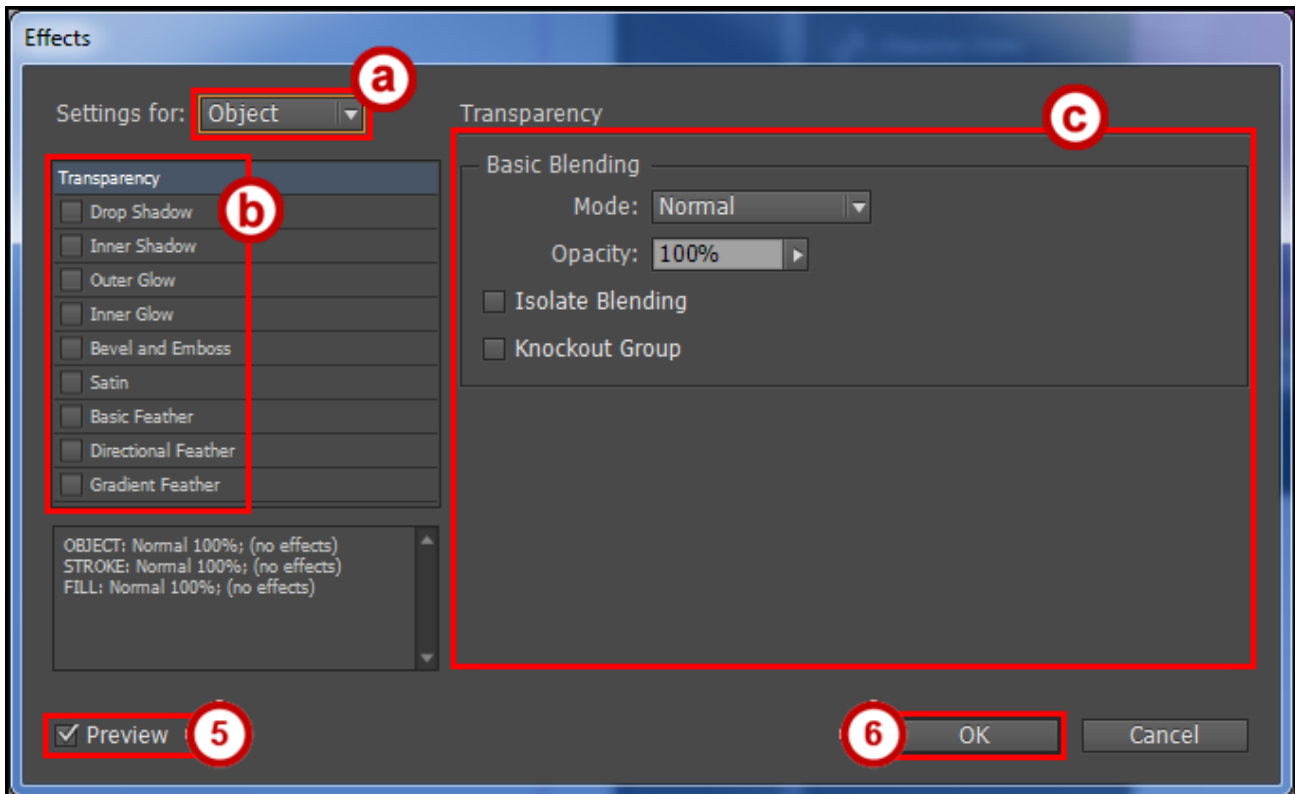

Figure 47 - Effects Dialog Window

Text Wrap and Shapes

Images can have text wrapping around them. Creating shapes and adding color help to apply a design to the publication.

Text Wrap

1. From the *Tools Panel*, click the **Selection Tool**.
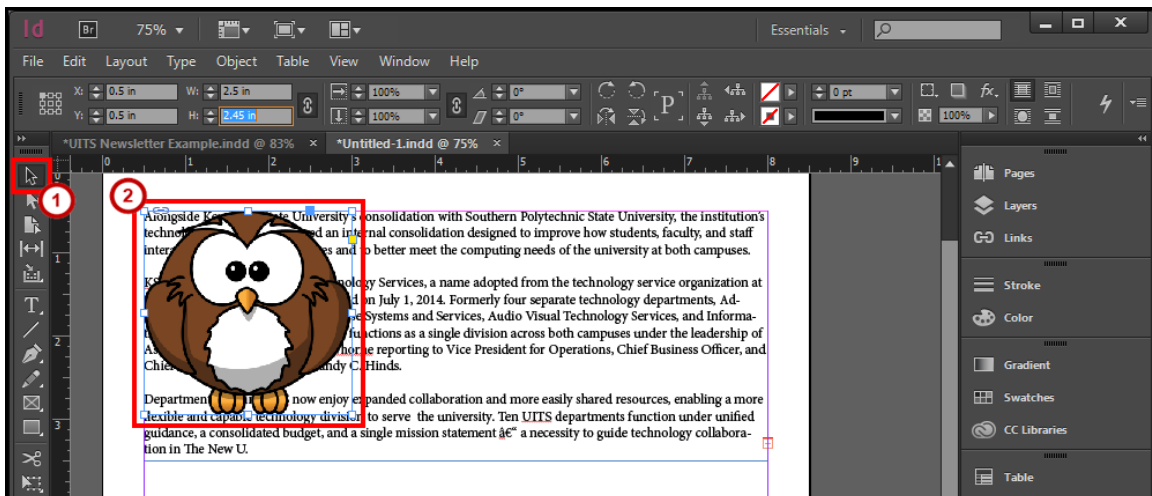2. On the document, **left click** the *Image*.

Figure 48 - Select Image

3. Click the **Window** menu.
4. Click **Text Wrap**.
5. In the *Text Wrap* pop-up window, **select** your desired text wrap and settings.
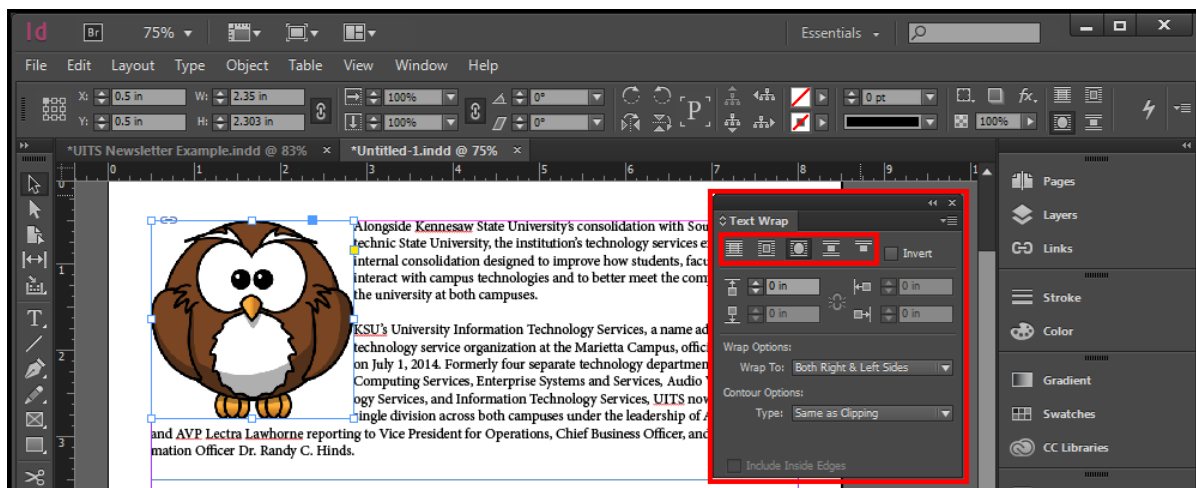

Figure 49 - Text Wrap

Inserting Shapes

1. From the *Tools Panel*, right click the **Shape Tool**.
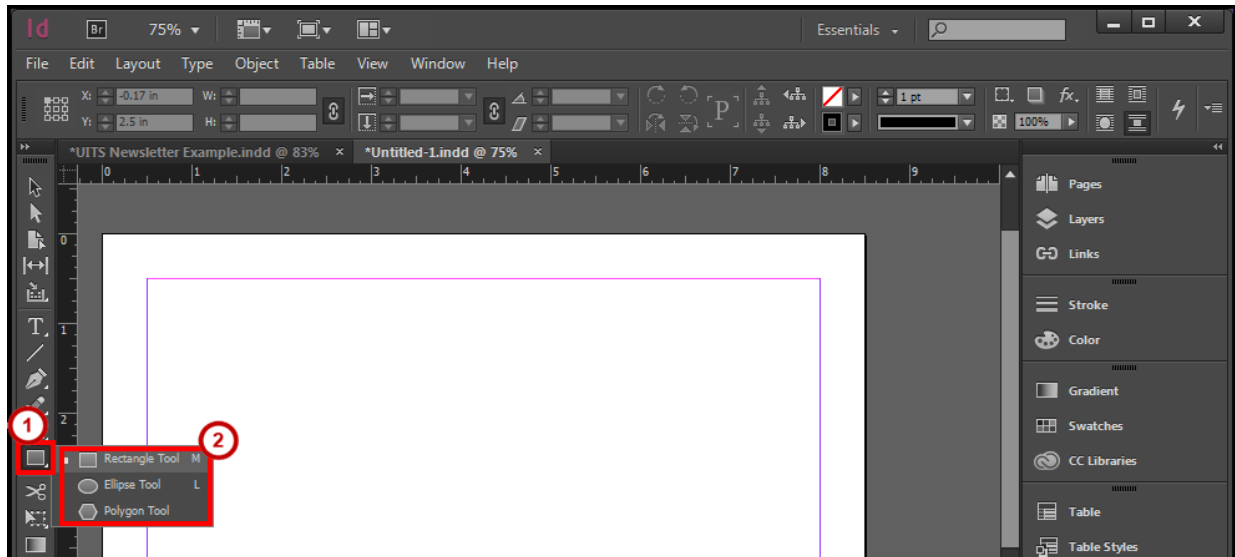2. **Select** your desired *Shape*.

Figure 50 - Select Shape

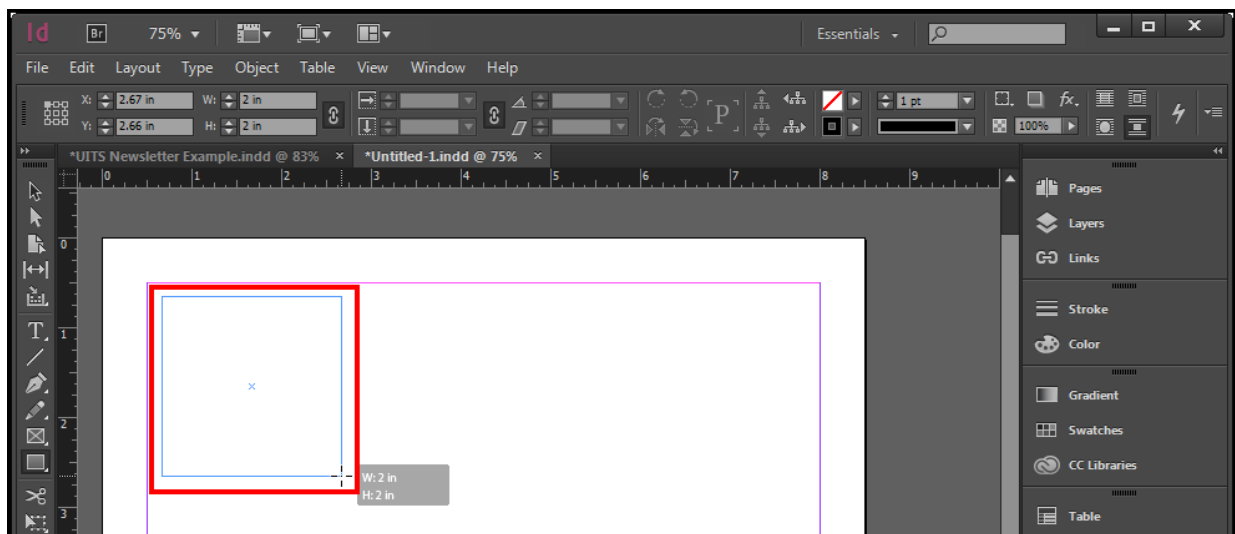3. On the document, **left click and hold**, then **draw** your *Shape*.

Figure 51 - Draw Shape

4. After you have created the desired size of the *Shape*, let go of the **Left Click**. Your shape is drawn and you can now apply a color. See Fill Color to learn how to apply a color.

Fill Color, Stroke, & Corners

You can apply a color to the line stroke or fill of the object or text. Change the stroke size, type, and add a design to the corners.

Change Fill Color
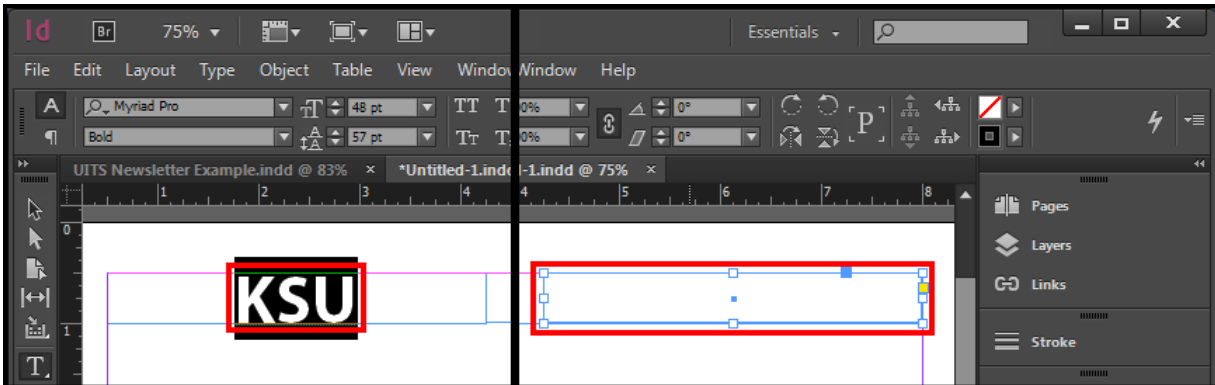
1. Select the desired **text** or **object**.

Figure 52 - Select Text   **Figure 53 - Select Object**

2. There are two ways you can apply a *Fill*.
    a. From the *Control Bar*, **double click** the **fill** to select a color from the *Color Picker* dialog window.
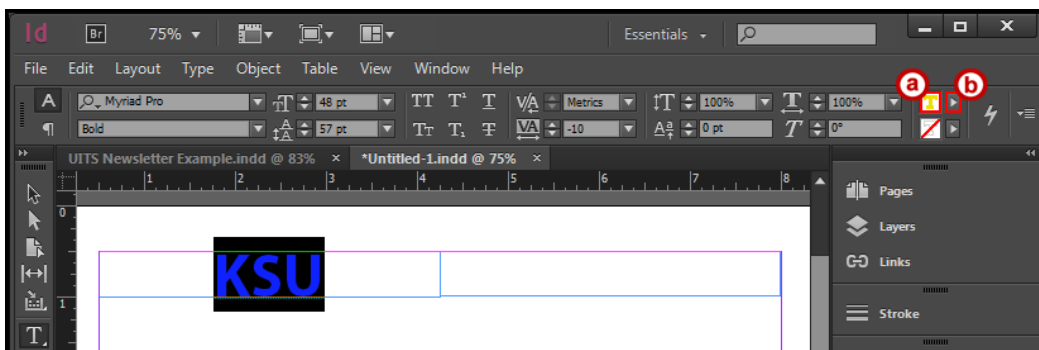   b. From the *Control Bar*, click the **Fill drop-down menu** and select a swatch.
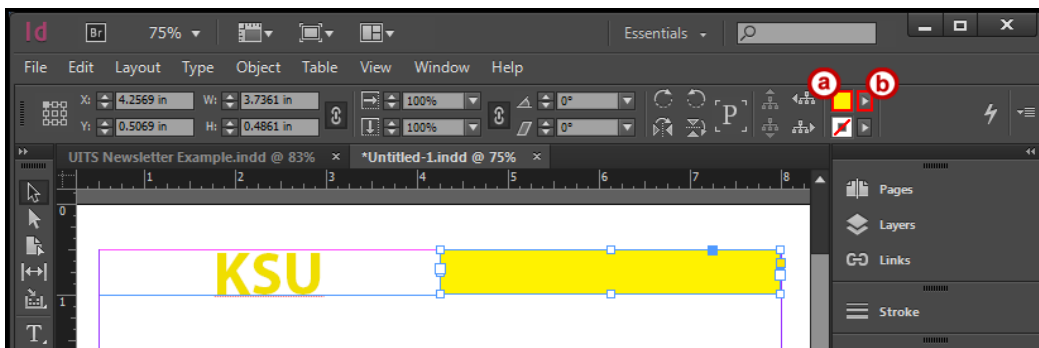

Figure 54 - Apply Fill to Text

Figure 55 - Apply Fill to an Object

Change Stroke Color

1. Select the desired **text** or **object**.
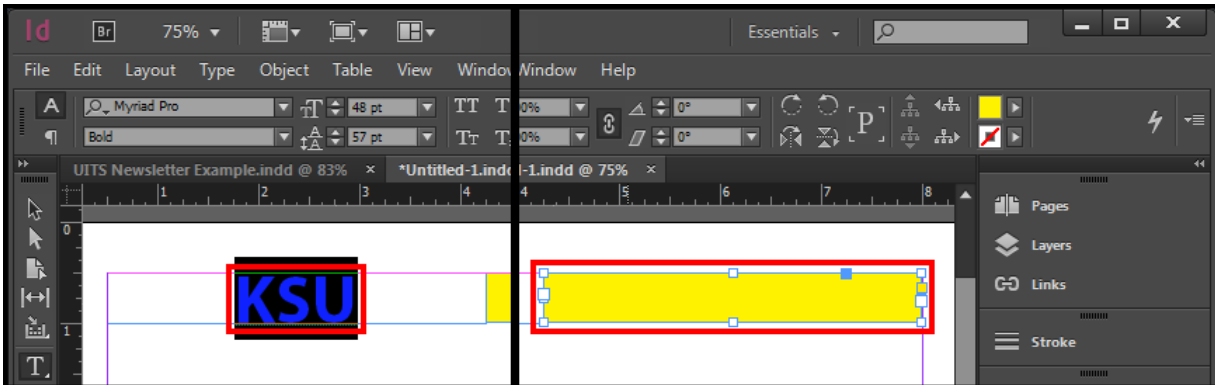

Figure 56 - Select Text   **Figure 57 - Select Object**

2. There are two ways you can apply a *Stroke*.
   a. From the *Control Bar*, **double click** the **stroke** to select a color from the *Color Picker* dialog window.
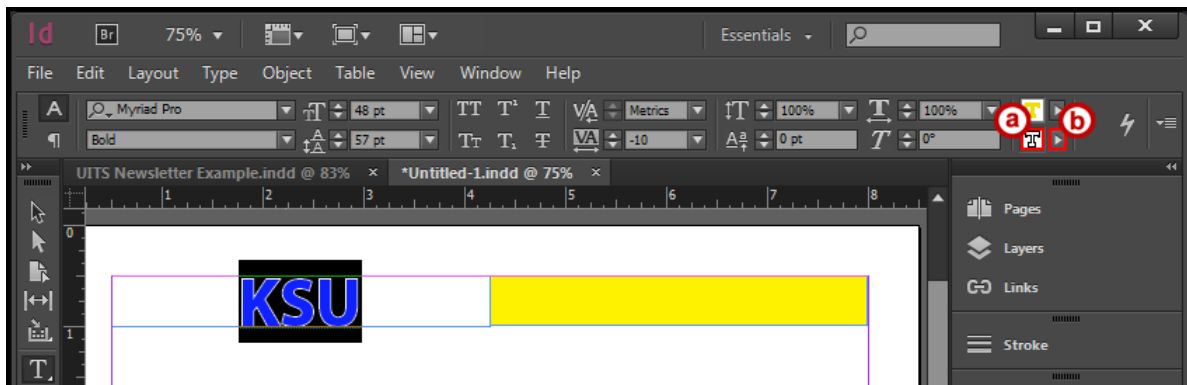   b. From the *Control Bar*, click the **Stroke drop-down menu** and select a swatch.
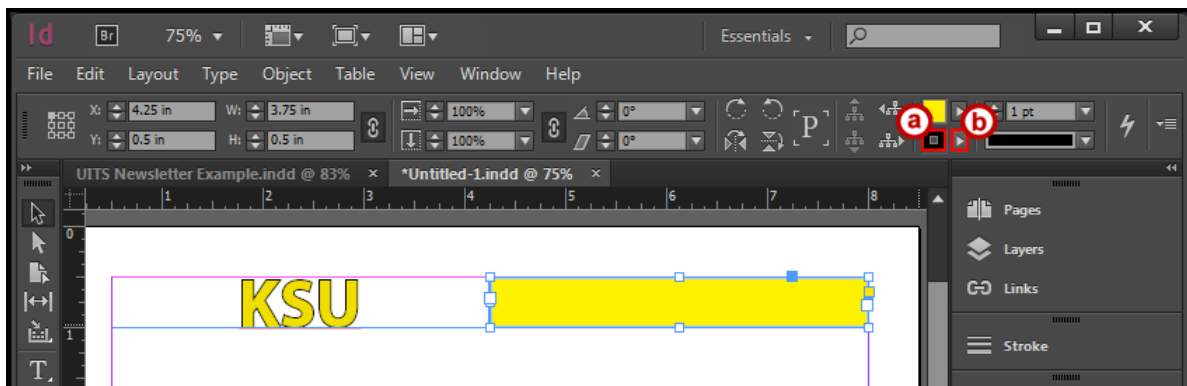

Figure 58 - Apply Stroke to Text

Figure 59 - Apply Stroke to an Object

Change Stroke Weight

1. Select the desired **object**.
2. There are two ways you can change a *Stroke Weight*.
    a. From the *Control Bar*, click the **up or down** arrows to increase or decrease the weight.
    b. From the *Control Bar*, click the **Stroke weight drop-down menu** and select a weight.
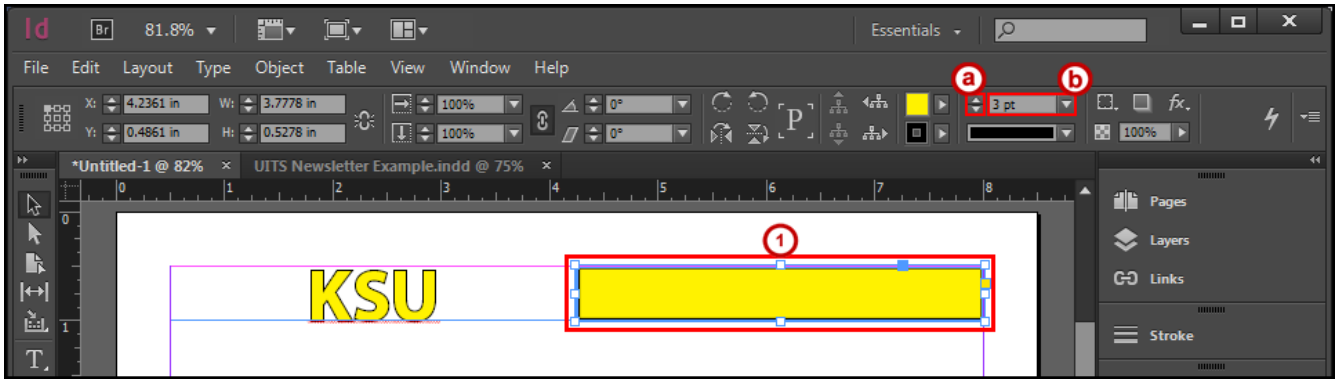

Figure 60 - Change Stroke Weight

Change Stroke Line Type

1. Select the desired **object**.
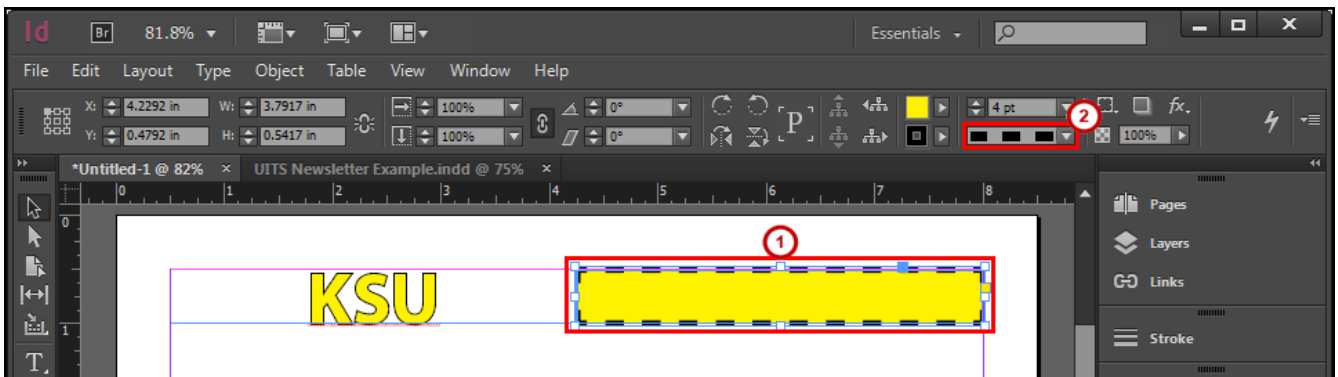2. From the *Control Bar*, click the **Stroke type drop-down menu** and select a type.

Figure 61 - Change Stroke Type

Change the Corners

1. Select the desired **object**.
2. From the *Control Bar*, click the **Corner drop-down menu** and select a corner.
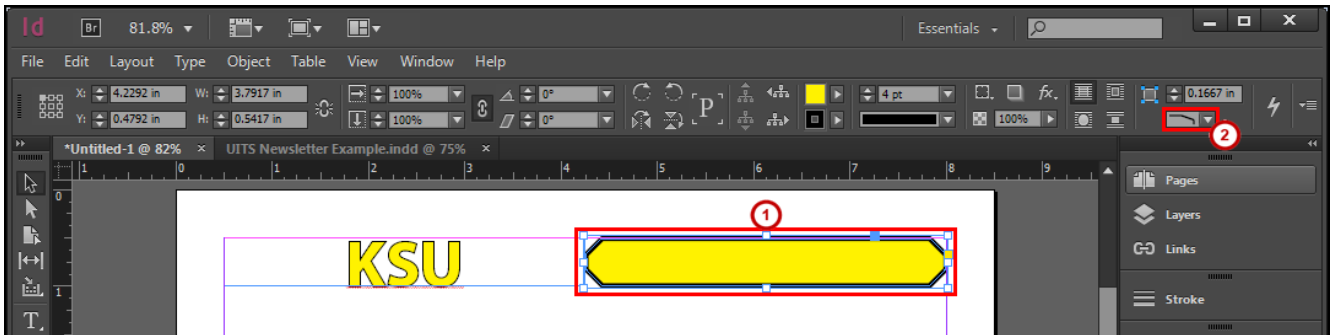

Figure 62 - Change the Corners

Corner Size and Shape

1. Select the desired **object**.
2. Click the **Object** menu.
3. Click **Corner Options**. A *Corner Options* dialog window will appear.
4. From the *Corner Options* dialog window, you have the following options:
    a. **Size** - Change the size of the corner style.
    b. **Shape** - Change the shape of the corner style.
    c. **Make all setting the same** - When you see a link ⬚ icon, changing the size or shape will affect all corners. When you see a broken link ⬚ icon, changing the size or shape will only affect that corner.
5. Check the **Preview** box to see what your changes will look like before applying.
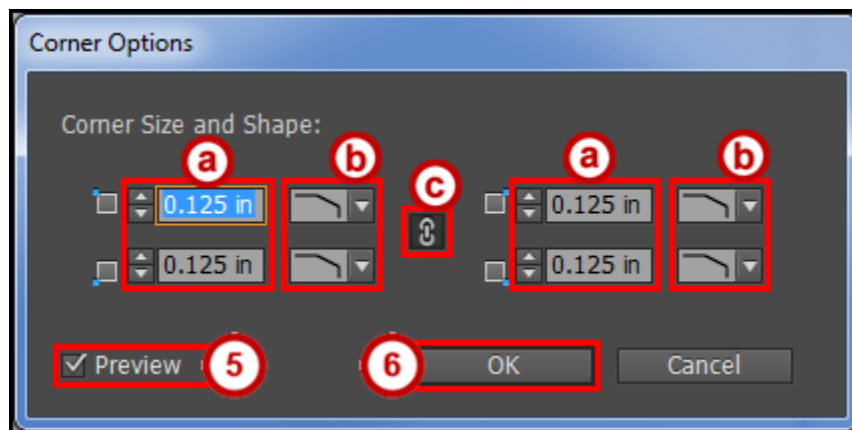6. Click the **OK** button.

Figure 63 - Corner Options Dialog Window

Layers

Layers allow you to organize content so that you can edit without affecting other areas or content.

Layers Panel

You can easily create and manage layers through the *Layers* panel. Follow these instructions to open the L panel.

1. Click the **Window** menu.
2. Click **Layers**.
3. The **Layers** panel will open on the *Panels* toolbar.
4. From the *Layers* panel, you have the following options:
   a. **Visibility** - Indicates whether items in the layers are visible or hidden.
   b. **Item Lock** - Indicates whether items are lock or unlocked. The lock icon indicates that the item is locked and cannot be edited. A black space indicates that the item is unlocked and can be edited.
   c. **Disclosure Triangle** - Click the disclosure triangles to view the components of a layer or an object.
   d. **Layer** - Used for organizing content.
   e. **Object** - The object located on the page.
   f. **Selected Item** - Indicates whether items are selected. A color box appears when an item is selected.
   g. **Layers Panel Menu** - View layer options.
   h. **Create New Layer** - Click the *Create New Layer* button to add a new layer.
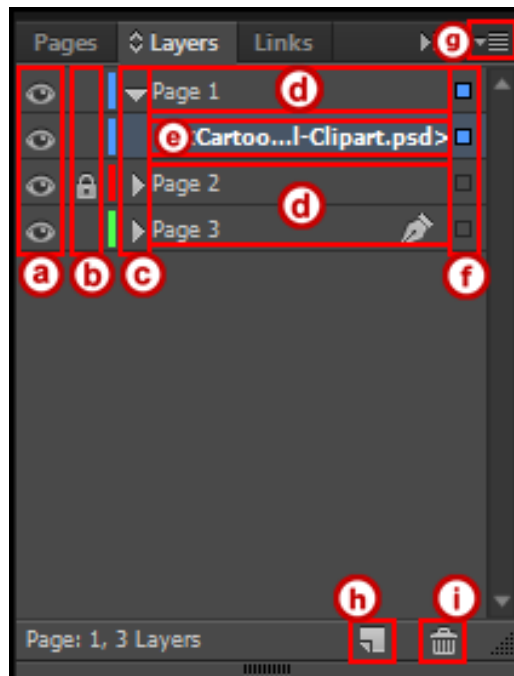   i. **Trash** - Select a layer or object, and then click the trash can to delete it.

Figure 64 - Layers Panel

Move Object to a Layer

1. Click the **Window** menu.
2. Click **Layers**.
3. The **Layers** panel will open on the *Panels* toolbar.
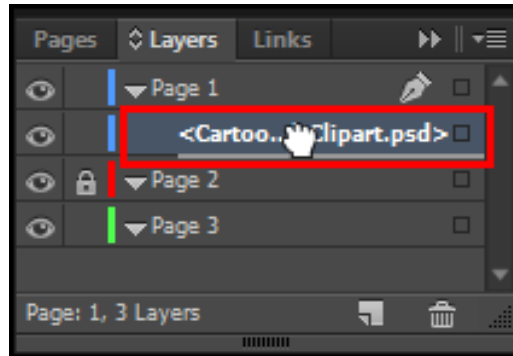4. **Left-Click and Hold** the object.

Figure 65 - Left Click and Hold Object

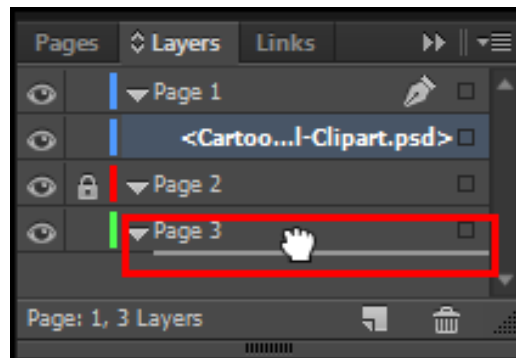5. **Drag** the item below a *layer*.
6. Let go of the **Left Click**.

Figure 66 - Drag Object to Layer

Additional Help

For additional help or installation issues, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: service@kennesaw.edu
- Website: http://uits.kennesaw.edu

KSU Service Desk for Students

- Phone: 470-578-3555
- Email: studenthelpdesk@kennesaw.edu
- Website: http://uits.kennesaw.edu