

InDesign User Group Presentation

January 28, 2009 Mark Poulalion

Section 1: Templates, etc.

Templates

1. **How to make a template.** You can save any InDesign document as a template by choosing “save as, template.”
2. **Advantage of using a template instead of going back to InDesign files.** When you click on the template file and you will get an untitled document—ready to work on—and it will **have** all the master pages, styles, etc. that you set up. If you use an InDesign file, you will have to delete the old material and you will have to remember to save as another name, otherwise you will accidentally save on top of your original file.
3. **How many templates do you need?** For a magazine, I would create three templates: 1) features, 2) departments and columns, 3) the cover. Each template would have the master pages, library, and snippets that I would need for those parts of the magazine.

Master Pages

1. **How a master page works.** Often you will design pages that are similar—using repeated elements, same size, certain colors and fonts, etc. Instead of building each page from scratch, you can use a master page. [[SHOW EXAMPLE WITH THREE BOXES.]]
2. **Advantages of a master page.** A good example is the folio on a magazine. If you have a master page for the folio, then you can change all the dates at one time, on your master page, and they are updated on any page where that master page is applied. All your folios will be consistent.
3. **What not to put on a master page.** Only put things on your master page that you do not plan to modify. If you have items that you will need to change text, move or resize, then put them in your library. (I’ll explain later.)
4. **If you MUST move something that came from your master page...** It is possible. You can Apple/Shift/click on the item in your document page and the modify it as needed. However, only your specific modification will be changed on that document page. For example, you could move an item, so the link to the master page about location will be broken. But if you changed that item’s color on the master page, then the color will still change on the document page.
5. **The advantages of using master page hierarchy.** To make a large project, like a magazine, consistent, you can base master pages on other master pages. The folio is a good example again. You set up your folio as master page A. Then you can create master page B for the

opening column but make it based on master page A. That means that with master page B you get the folio from the master page A, but you add the features of the opening column. When you change the folio on master page A, it will automatically change on master page B. If you base all the master pages of your magazine on master page A, then you can change your folio for an entire issue by changing it one time only—on master page A. You get the idea.

6. **The fastest way to set up new projects with master pages.**

Let's say you are starting a new issue of a magazine. Here's a basic way to set up the pages so that you can flow in new text and copy.

Basic Way

1. Open your template file, which will create a blank document.
2. Apply the desired master page to the document, for example, a product review page.
3. Delete any unused master pages. This will keep your file size small.
4. Name the file.
5. Save and Name it to the folder for your new project.
6. Now you have to reopen the template and start over.

Fastest Way

1. Open your template file, which will create a blank document.
2. Apply the desired master page to the document
3. Delete the unused master pages
4. Name the file
5. Choose "save as—copy" and save to the folder for your new project.
6. Click "undo" (Apple—Z) to bring back your deleted master pages, and then you can apply another master page and save the next item that you need. This will save you the time of opening the template over and over to make new pages.

Libraries

This is one of the most underused tools in InDesign, and it can greatly increase your efficiency. When you have an item that is used repeatedly, but not always on the same location of a page, for example, a sidebar box or a pull quote, then you can put that item in your library. It's like your own, private digital asset management system.

1. **How to create a library.** Choose file—new—library.
2. **Adding items to a library.** Just drag the item onto the library with option held down. Be sure to give it a name that is descriptive, like "map of the Caribbean."
3. **Change view as needed.** You can make the images larger as needed.
4. **Great search options.** You can search for library items using key words.

5. **Place vs dragging.** This allows you to keep your locations the same. This will retain your x/y coordinates.
6. **Updating.** You don't need to delete and replace changes to items in the library. Just update by making the change on the page, select the item in the library and with you updated item on the page also selected, choose update in the library pull down.
7. **Multiple libraries.** You can create multiple libraries that are specific to certain projects or clients.
8. **Libraries on servers**—advantages and disadvantages. You may want to make a library available to multiple users by putting it on a server. In order to put a library on a server and allow others to open it at the same time, you will need to “lock” it so that the items cannot be modified. (because you cannot allow changes if two people are using it at the same time).

Summary of Section 1

We've covered templates, master pages, libraries, and snippets. Now we move on to formatting text and objects using style sheets.

Section 2: Style Sheets

Style sheets are MUCH better than using the eye dropper tool.

For example, what if you need to change the font or point size in a document? Do you select all the next and then make the change? What if there are different kinds of text in your document, such as headlines, captions, bylines, etc. When you need to make a change in your body text, do you have to work around these different kinds of text? There is a better way—use style sheets!

Paragraph Styles and Character Styles

For text, you have two choices: paragraph style and character style

- **How to create a paragraph style or character style.** (Select that text that has been formatted the way you want it to look. Go to paragraph styles panel and hold down option while you click “make new.” Name it and before you save it, select the option that says “apply the style to text” Then save it. For character styles, select the text that has been formatted the way you want, go to the character style panel and proceed as for paragraph styles.
- **When to use paragraph style.** Paragraph styles will apply to the entire paragraph. They are good for headlines, subheads, body text, captions, bylines, sidebar text, etc. They are NOT good for bold, italic, or any other treatment that may apply to only a few words within a paragraph.
- **When to use character style.** Character style applies only to the selected text to which you apply the style. You could use character styles for italics, different font treatments to specific words in a pull quote, etc. A character style setting will override a paragraph setting.
- **Character style gotcha.** NEVER apply a character style to an entire paragraph. You will override the paragraph style, and strange things will happen.

- **Overriding other styles.** If you have trouble applying a style, you may need to override other styles that are applied to that text. To do this, hold down the control button when you click to apply the style.
- **Putting styles in your library.** You can put character and paragraph styles in your library instead of your template. This will help reduce your file size because you won't have unused styles in your style sheet. Once you place an item from your library that has unique styles in it, those styles become a part of the document.
- **The Next feature and saving time when you flow in copy.** When designing a magazine, for example, you may need to flow in an article that starts with a headline, followed by a subhead, byline, initial paragraph and body copy. You can use the "next" feature on paragraph styles to automatically style these different elements when you put them on your page.

Table of Contents

A table of contents is not just for books. You can use it to list advertisers, figures, catalog items, etc. If you have used paragraph styles, then you can create a table of contents by drawing on specific styles.

Here are the steps to creating a table of contents:

- | | |
|--|--|
| 1. Open a book or any document with multiple pages. | don't want to include that text in your TOC. Break link to style |
| 2. Open TOC from book. | 9. Update TOC—layout |
| 3. Title—name on top of the page | 10. More options: between entry and space "right indent tab" ^y |
| 4. Set style paragraph | 11. Pick number style = TOC #
Pick leader = dot leader |
| 5. Choose styles you want to drag from book.
Chapter head
Heading 1 | 12. Repeat for all paragraph styles
Save styles—NO |
| 6. Pick style
TOC headings= Heading 1
TOC chapter head =
Chapter head | 13. Set tab in paragraph style
Add tab stop
Add period – as lead |
| 7. Include book Doc—OK | 14. Set Space before |
| 8. Select any text that may have the paragraph styles you chose but you | 15. Set 2p left indent |

This app allows you to set it so that all ID files open in their native version. No unwanted conversions.

<http://www.rorohiko.com/wordpress/2008/11/13/recipe-making-mac-os-x-launch-the-correct-version-of-indesign/>