InDesign: An introduction
How to Use This Book

This handbook accompanies the taught sessions for the course. Each section contains a brief overview of a topic for your reference and then one or more exercises.

The Exercises

Exercises are arranged as follows:

- A title and brief overview of the tasks to be carried out
- A numbered set of tasks, together with a brief description of each
- A numbered set of detailed steps that will achieve each task

Some exercises, particularly those within the same section, assume that you have completed earlier exercises. Your lecturer will direct you to the location of files that are needed for the exercises. If you have any problems with the text or the exercises, please ask the lecturer or one of the demonstrators for help.

This book includes plenty of exercise activities – more than can usually be completed during the hands-on sessions of the course. You should select some to try during the course, while the teacher and demonstrator(s) are around to guide you. Later, you may attend the IT Learning Programme’s follow-up sessions (called Computer8), where you can continue work on the exercises, with some support from IT teachers. Other exercises are for you to try on your own, as a reminder or an extension of the work done during the course.

Writing Conventions

A number of conventions are used to help you to be clear about what you need to do in each step of a task.

- In general, the word **press** indicates you need to press a key on the keyboard. **Click**, **choose** or **select** refer to using the mouse and clicking on items on the screen (unless you have your own favourite way of operating screen features).

- Names of keys on the keyboard, for example the Enter (or Return) key, are shown like this `ENTER`.

- Multiple key names linked by a + (for example, CTRL+Z) indicate that the first key should be held down while the remaining keys are pressed; all keys can then be released together.

- Words and commands typed in by the user are shown like this **like this**.

- Labels and titles on the screen are shown like this **like this**.

- Drop-down menu options are indicated by the name of the options separated by a vertical bar, for example **File|Print**. In this example you need to select the option **Print** from the **File** menu. To do this, click with the mouse button on the **File** menu name; move the cursor to **Print**; when **Print** is highlighted, click the mouse button again.

- A button to be clicked will look like this **like this**.

- The names of software packages are identified like this, and the names of files to be used like this.
Software Used

InDesign CS6

Files Used

ForExercise3.indd
ForExercise4.indd
ForExercise5.indd
ForExercise6.indd
ForExercise7.indd
ForExercise8.indd
ForExercise9.indd
statue_head.tiff
fragment.png

Revision Information

2.0  August 2012  Dave Baker  Created (supersedes original InDesign course)
2.0a January 2013  Dave Baker  Minor changes to text and slides
2.0b October 2013  Dave Baker  Minor corrections and updates
2.0c October 2013  Dave Baker  Included ‘bleeds’
2.1  July 2014  Dave Baker  Review of exercises

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Contents

1 Introduction
   1.1. What you should already know
   1.2. What you will learn
   1.3. Where can I get a copy of the software?

2 The Basics
   2.1. Layers
   2.2. Frames
   2.3. Guides
   2.4. Text Threading

3 Setting up the DTP Tool
   3.1. Tool layout
   3.2. Dual monitors
   3.3. Tool settings
   3.4. Document Defaults

4 Working with layers
   4.1. Ordering of objects within layers

5 Working with guides
   5.1. Bleeds

6 Working with frames

7 Working with text
   7.1. Text threading
   7.2. Text wrap
   7.3. Styles
      7.3.1. Paragraph styles
      7.3.2. Character styles

8 Using images
   8.1. Placing images
   8.2. Managing documents containing placed images

9 Using colour
   9.1. Colour technologies
   9.2. Using colour in a document
   9.3. Swatches and Palettes
   9.4. Colours in images
10 Printing ................................................................................................. 53
11 The finished document ...................................................................... 55
12 What Next? ........................................................................................ 56
   12.1. Other digital image sessions ....................................................... 56
   12.2. Computer8 .................................................................................. 56
   12.3. IT Services Help Centre ............................................................... 56
   12.4. Downloadable course materials (WebLearn) .............................. 56
Table of Exercises

Exercise 1  Exploring the defaults for InDesign ......................... 6
Exercise 2  Managing layers in a document ................................. 9
Exercise 3  Working with guides................................................. 15
Exercise 4  Working with frames.................................................. 21
Exercise 5  Working with text...................................................... 28
Exercise 6  Working with styles.................................................... 33
Exercise 7  Using images............................................................ 43
Exercise 8  Using colour............................................................ 49
Exercise 9  Creating a PDF version of a document......................... 54
1 Introduction

Welcome to this desktop publishing (DTP) course!

This booklet accompanies the course delivered by University of Oxford’s IT Services, IT Learning Programme. Although the exercises are clearly explained so that you can work through them yourselves, you will find that it will help if you also attend the taught session where you can get advice from the teachers, demonstrators and even each other!

If at any time you are not clear about any aspect of the course, please make sure you ask your teacher or demonstrator for some help. If you are away from the class, you can get help by email via courses@it.ox.ac.uk

1.1. What you should already know

This session makes no assumptions about your existing knowledge of DTP.

We will assume that you are familiar with using a computer and the basics of file management, such as opening files from particular folders and saving them, perhaps with a different name, back to the same or a different folder.

The computer network in the teaching room may differ from what you are used to in your College or Department; if you are confused by the differences ask for help from the teacher or demonstrators.

1.2. What you will learn

This session is not a comprehensive coverage of all of the aspects of DTP; it is designed to draw your attention to some of the important concepts and useful skills, and to give you a basis for further research and study.

In this session we will cover the following topics:

• Layers
• Guides
• Frames
• Using text and styles
• Using images
• Colour

1.3. Where can I get a copy of the software?

This course is written as an introduction to DTP, and should be useful no matter which DTP application you will be using.

In the examples we will assume that you have a copy of InDesign.

InDesign is a commercial DTP application widely used in the publishing industry. It is written by Adobe and available through standard software resellers. If you are a member of staff at Oxford University you are able to order InDesign through the online shop. If you are a student then some resellers are able to supply the software under an educational licence at a reduced cost. InDesign is available for Windows and Mac OSX.
2 The Basics

Most of us will be familiar with using word processors to create our documents. Word processor capabilities have steadily grown to the point that the most popular of them (such as Word and Pages) do have some similarities with desktop publishing applications.

Word-processors make the production of professional documents relatively easy. However, you may have discovered that for larger documents that require sophisticated layout and which rely heavily on the use of graphics, you soon encounter the limitations of the software.

Desktop publishing (DTP) applications have a number of key features which help with the design and management of documents with complex layouts. The four that we will focus on initially are briefly described below, and expanded upon in the sections that follow.

2.1. Layers

Content in a DTP document is organised into layers. By default, each layer is transparent but can have text and/or graphics placed on it. Empty areas of the layer remain transparent, and as they are stacked one on top of the other they build up a composite that is the document.

Every DTP document has at least one layer, but you can add as many as are necessary.

![Figure 1 Layers in a document](image)

2.2. Frames

Frames are containers for content that sit within a layer. The content can be text or graphics, but not usually both.

Frames can be repositioned or resized as needed. Resizing a frame might cause the content to no longer fit. In the case of text, the extra is considered to be overflow text and is not displayed. Frames can be linked so that any overflow text from one frame will ‘flow’ into the linked frame. In the case of graphics, the part of the graphic that lies outside the frame is cropped.

Mostly frames are rectangular, but in principle they can be any shape.

2.3. Guides

Enabling the alignment of objects on the page is a key element of DTP applications. One way of achieving alignment is through the use of guides. There are different types of guide, but they are all straight lines that you can use either as a visual check that objects are aligned, or you can turn on the ‘snap’ feature so
that objects that are moved close to a guide will automatically ‘snap’, or jump, to the guide.

2.4. Text Threading

We have already mentioned that text is placed on to the page within a frame. Frames can be linked together so that overflow text from one frame will automatically flow into a second frame. This second frame could be on the same page or a different page.

Several frames can be linked one after the other if necessary.

Where a text frame overlaps another frame, there is usually an option to make the text wrap around the second frame.
3 Setting up the DTP Tool

Desk top publishing (DTP) tools have a very large number of features and options to suit different tasks in the document production process – many more than you would typically find in a word processor.

Most of these tools and options can be customised to suit the way you like to work and/or the particular type of document you are working on and/or the stage of the production process you are in.

Personal customisation of the tool is something that you will do as you become familiar with the DTP process, but some common customisations are described below:

3.1. Tool layout

DTP tools usually make use of toolboxes and panels to help with document design. You should familiarise yourself with these, especially as not all tools and panels are visible all of the time and you can waste a lot of time searching for them.

Usually you can drag toolboxes and panels around the screen to suit the way you like to work. Some DTP applications allow you to save the way you have arranged your screen, or even have different named variations that you can recall as appropriate.

Make sure that you find out how to reset the screen back to its default layout; this can be very convenient when your customisations get out of hand or you ‘lose’ a particular tool or panel!

3.2. Dual monitors

One of the disadvantages of having lots of toolboxes and panels available on your screen is that they reduce the amount of design space for the document itself.

Many document designers use either a very large monitor, or dual monitors.

Large monitors can allow you room for your preferred tool arrangement and still leave space to display a full page. Large monitors also allow you to display A4 (or even A3) documents at close to full size.

Dual monitors can be a cheaper alternative to a large monitor, although for desktop computers you may need to also have a graphics card that has dual output. Dual monitors may not allow you to conveniently view documents at full size but you do have the advantage that you can have your tools and panels arranged on one monitor leaving the second monitor solely for the display of the document.

3.3. Tool settings

Virtually every aspect of DTP applications is customisable. Common settings that you should adjust are:

- **Units and increments**: Set these to your preferred measuring unit such as inches, centimetres, millimetres or points.

- **Dictionary**: Choose the appropriate language for the dictionary. The hyphenation options are also commonly included in with dictionary settings.

- **Spelling and autocorrect**: The dictionary chosen will determine some of the spell checking options, but you will also be able to fine
tune the spell checking and adapt and correct the list of misspellings that you allow the tool to correct automatically.

- **Grids and guides**: These will help with the alignment of content on a page. You can often customise the spacing and display options.

There is usually a way to reset all settings to their original values.

### 3.4. Document Defaults

When you create a new document, the tool will make some assumptions for you. For example: page size, orientation, margin size, number of columns, number of pages, etc.

You are usually given the opportunity to make changes to the defaults at the time the document is created, or to revisit the properties later, but if you routinely create documents with a particular layout, you can change the default document settings.

Most DTP applications also enable you to create templates (patterns) for documents. Templates are not covered in this course.
Exercise 1   Exploring the defaults for InDesign

In this exercise we will explore some of the common defaults in the InDesign desk top publishing tool. We will set the default font and size for text in a text frame.

- Start InDesign
- Locate the Preferences dialog and explore the options
- Enable the dynamic spelling option
- Change the Ruler Units to Millimetres
- Close InDesign

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Start InDesign</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
</table>

The InDesign icon will be similar to:

On Windows:
Click as follows:
- Start at the bottom left of the Task Bar
- All Programs
- Adobe Design Premium & Web Premium
- InDesign icon (see above)

On Mac OSX:
Open a Finder window
In the left hand panel click on Applications
Scroll down the list of applications in the right-hand panel
Double-click on the InDesign icon (see above)

<table>
<thead>
<tr>
<th>Step 2</th>
</tr>
</thead>
</table>

Be patient!

The first time InDesign is started it may take a while before it is ready to use. This is because it does some house-keeping behind the scenes.

<table>
<thead>
<tr>
<th>Step 3</th>
</tr>
</thead>
</table>

If the Welcome Screen appears (Figure 2), close it.
Task 2
Locate the Preferences dialog and explore the options

Step 1
On Windows:
Select Edit | Preferences | General...

On Mac OSX:
Select InDesign | Preferences | General...

Step 2
Take a look at the list of categories at the left of the Preferences dialog to see what types of preferences are available for changing.

Task 3
Enable the dynamic spelling option

Step 1
Click on Spelling in the list of Preference categories. Click on the Enable Dynamic Spelling option to put a tick in the box.

Task 4
Change the Ruler Units to Millimetres

Step 1
Click on Units and Increments in the list of Preference categories.

In the Ruler Units section of the dialog, change the Horizontal and Vertical entries to be Millimeters. Click OK to close the Preferences dialog and save the changes.

Task 5
Close InDesign

Step 1
In Windows:
Select File | Exit

In Mac OSX:
Select InDesign | Quit InDesign
4 Working with layers

Most desktop publishing (DTP) tools allow you to organise your document content into layers. Each document has at least one layer, but you can add extra layers as necessary (and subsequently delete them if necessary).

Each layer has properties that can be changed:

- **Locked/unlocked**: If a layer is locked then no changes can be made to it. If you are struggling to make a change to something on your document but can’t, always check to see if it is on a locked layer!

- **Visible/hidden**: A layer can be hidden. When hidden, you cannot make changes to content on the layer and by default content on a hidden layer will not be printed. Typically, guides that are on a hidden layer lose their ‘snap to’ property.

- **Stacking order**: Content on a layer that is at the top of a stack hides content in lower layers. The exception to this is that objects which have ‘text wrap’ enabled will by default affect text on any layer. The stack order of layers can be changed as long as they are not locked or hidden.

- **Colour**: If there are many layers, it can sometimes be difficult to identify which layer a particular object is on. To help with this each layer has a colour associated with it; when an object is selected it is usually identified with the colour of the associated layer.

Layers have several uses:

- Content on locked layers cannot be accidentally changed, moved or deleted.

- Text can be overlapped with graphics (or vice versa) by appropriate stacking of the layers. The transparency of objects on a layer can also be adjusted so that underlying content can be partially visible.

- Layers which have content which is distracting during the design process – perhaps a coloured graphic – can be temporarily hidden.

- Alternative layouts can be prepared and shown to clients by selectively hiding and showing layers.

- You can have different layers for different audiences. For example you can have the same text in different languages each on their own layer.

- When proofreading text, you can hide all non-text layers before printing.

- If guides are placed on a separate layer, it is easy to temporarily turn off the guides ‘snap to’ behaviour.

- Layers used purely to help with the design process can be hidden when printing or creating a PDF.

4.1. Ordering of objects within layers

Within a layer, there is an implicit ordering of objects, with objects added later being above objects added earlier. The order of objects can be changed.

The transparency of objects within a layer can usually be adjusted to enable lower objects to partially show through objects above them.
Exercise 2  Managing layers in a document

In this exercise we will create a new A4 double-side document and add three layers to it. We will use one layer for our text, one for our images and one for the document background.

• Create a new A4 double-sided document
• Add a second page
• Open the layers dialog
• Rename the current layer to Mistake
• Add layers called
  Text
  Images
  Background
• Rearrange the order of the layers to be:
  Text
  Images
  Mistake
  Background
• Delete the Mistake layer
• Save the document as layers.indd and close the document

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Create a new A4 double-sided document</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Step 1 Open InDesign</td>
</tr>
<tr>
<td></td>
<td>Step 2 In the Welcome Screen, in the Create New section click on Document to display the New Document dialog (Figure 3)</td>
</tr>
<tr>
<td></td>
<td>Step 3 Click on the More Options button.</td>
</tr>
<tr>
<td></td>
<td>Step 4 Set the options to be as shown in Figure 3. The only settings you are likely to need to change are: Facing Pages unchecked, Margins 15mm, Bleed 3mm</td>
</tr>
<tr>
<td></td>
<td>Step 5 Click OK. This will display a blank document page, with the margins highlighted in pink and with an outer bleed mark.</td>
</tr>
</tbody>
</table>
Figure 3 InDesign New Document Dialog

**Task 2**
Add a second page

**Step 1**
In the collection of Panels at the right of the *InDesign* screen, click on *Pages*.
Alternatively press the F12 key.
This will display the *Pages* panel (Figure 4).

Figure 4 InDesign Pages panel

**Step 2**
At the bottom of the *Pages* panel, click on the *Create new page* button (See Figure 4)
### Step 3
Close the **Pages** panel by pressing F12, or click on **Pages** in the Panel collection.
(Note: We could have specified two pages in the initial **New Document** dialog)

### Task 3
Open the Layers window

#### Step 1
In the collection of Panels at the right of the **InDesign** screen, click on **Layers**.
Alternatively press the F7 key.
This will display the **Layers** panel (Figure 5).

#### Step 2
Every document has at least one layer, called **Layer1** by default.
Notice the icons against the layer name.
Rest your mouse pointer in turn over the different parts of the **Layer1** entry in the **Layers** panel to identify what each part represents.

### Task 4
Rename the current layer to **Mistake**

#### Step 1
In the **Layers** panel, double-click on **Layer1**.
In the **Layer Options** dialog, replace **Layer1** with **Mistake** and click **OK**.

---

![Figure 5 InDesign Layers Panel](image)

---

### Task 5
Add layers called **Text** **Images** **Background**

#### Step 1
In the **Layers** window, click on the **Create new layer** button (see Figure 5).
A new layer is added above the current layer.

#### Step 2
Rename the layer to **Images**
(See Task 4 above)
### Task 6
Rearrange the order of the layers to be:
- Text
- Images
- Mistake
- Background

#### Step 1
In the **Layers** Window, single click on the **Background** layer.
Click and drag the layer name to move the layer to be underneath the **Images** layer.

#### Step 2
Move the layers so that they are in the following order:
- Text
- Images
- Mistake
- Background

### Task 7
Delete the Mistake layer

#### Step 1
Single click on the **Mistake** layer to select it.
Click on the **Delete selected layers** button to remove the layer.

#### Step 2
Close the **Layers** panel by pressing the F7 key or click on **Layers** in the Panel collection.

### Task 8
Save the document as **layers.indd** and close the document.

#### Step 1
Select **File | Save As**
In the **Save As** dialog, save the document as **layers.indd**

#### Step 2
Select **File | Close**
5 Working with guides

Alignment of elements on the page is a key part of professional document design. The placement of all content should be done in a deliberate way that enhances the look of the document and directly or indirectly helps the reader.

Alignment can be achieved either through the use of guides or grids (or both). In this course we will focus on guides.

There are three types of guide:

- **Margins and columns**: These guides are automatically placed on the page when we set the margins of the document, or choose to have a text frame divided into columns.

- **Ad hoc**: We can add guides to a page whenever and wherever we need them at a particular stage in the design process.

- **Smart**: These are temporary guides that appear whenever we are moving an object and it aligns with the edge or centre of another object (or the page). Not all DTP applications support Smart guides.

Guides can be made ‘snappy’ so that when an object is moved close to a guide, it snaps to it.

Guides generally operate across layers, so that a guide placed on one layer can be used to align objects on another. This is only the case if the guide is on a visible layer, and so it is common practice to place guides on a separate ‘Guides’ layer; the ‘snappy’ behaviour of the guides can then be temporarily turned off by hiding the layer.

Guides are either horizontal or vertical. Some DTP applications support Smart guides when an object is being rotated, so that you can rotate to a specific angle of your choice.

5.1. Bleeds

Standard office laser and inkjet printers can’t print to the edge of the paper. If your document design is such that the areas close to the paper’s edge are blank, then this will not matter.

However, if your design runs right to the edge, the document will need to be printed on oversized paper (on a suitable printer) and then trimmed down to the correct size.

Even a slight error in the trimming could leave an unsightly sliver of unprinted paper, so to avoid this we introduce a bleed. A bleed is a guide (or margin) that is slightly larger than the paper (usually 2-3mm larger). When we put coloured content at the edge of the paper, we align it with the bleed, so that the trimmed edge always looks neat (See Figure 6).
Figure 6 Trimming with and without a bleed
**Exercise 3  Working with guides**

*In this exercise we will open an existing document and then add a series of guides to it. These guides will help us place text and image frames in the correct place in the next exercise.*

- Open the *layers.indd* document from Exercise 2 or open *ForExercise3.indd*
- Create a Guides layer
- Create guides for three columns on one of the pages
- Add horizontal guides to the page
- Lock the guides in place
- Enable the Snap to Guides options
- Duplicate the page
- Save and close the document as *guides.indd*

| Task 1 | Step 1 | Open InDesign  
If the Welcome screen appears, close it using the Close button at its top right corner.  |
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Step 2</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Step 3</strong></td>
</tr>
<tr>
<td>Task 2</td>
<td>Add a Guides layer</td>
<td><strong>Step 1</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Step 2</strong></td>
</tr>
</tbody>
</table>
|       |        | **Step 3** | Double click the name of the new layer to open the Layer Options dialog  
Change the Name to Guides.  |
|       |        | **Step 4** | Click and drag the Guides layer to the top of the list of layers.  |
| Task 3 | Create guides for three | **Step 1** | Make sure the Guides layer is highlighted in the Layers panel.  |
columns.

**Step 2**
Select **Layout | Create Guides** to open the **Create Guides** dialog.

**Step 3**
In the **Columns** section (Figure 7):
- Change the **Number** to 3
- Increase the **Gutter** value to 10 mm
- Change **Fit Guides** to **Margins**

Changing the **Fit Guides** option to **Margins** ensures that the columns are placed within the margins of the page.

Note: You can click on the Preview option in any dialog to see how your changes will be made on the page.

Click **OK**.

![Create Guides dialog](image)

**Figure 7 InDesign Create Guides dialog**

**Task 4**
Add horizontal guides to the page in the Guides layer

**Step 1**
Make sure the **Guides** layer is highlighted in the **Layers** panel.

**Step 2**
Make sure that the **Ruler** is displayed at the top and left hand side of the **InDesign** window. If not, select **View | Show Rulers**

**Step 3**
Click into the top **Ruler**, hold down the mouse button and drag a guide onto the page.

Release the mouse button when the guide looks to be about 40mm from the top of the page.

**Step 4**
Select the guide you have just created by clicking on it. It will change colour when selected.

**Step 5**
In the **Control Panel** beneath the Menu Bar, change the **Y** value to 45 mm.
<table>
<thead>
<tr>
<th>Task 5</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lock the guides</td>
<td>In the Layers panel, click into the empty square to the right of the Eye symbol in the Guides layer.</td>
</tr>
<tr>
<td></td>
<td>A padlock symbol will appear to show that the layer is now locked.</td>
</tr>
<tr>
<td></td>
<td>(You cannot make any changes to a locked layer unless you unlock it by clicking on the padlock.)</td>
</tr>
</tbody>
</table>

| Step 2           | Press F7 to hide the Layers panel. |

<table>
<thead>
<tr>
<th>Task 6</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable the Snap</td>
<td>Select View</td>
</tr>
<tr>
<td>to Guides option</td>
<td>If there isn’t a tick next to Snap to Guides, click on it to enable it.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 7</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate the</td>
<td>Press F12 to display the Pages panel.</td>
</tr>
<tr>
<td>page</td>
<td>The current page will be highlighted in the panel.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Double-click on the page which is NOT highlighted in the Panel.</td>
</tr>
<tr>
<td></td>
<td>The main display will now show the page that does not have the guides defined on it.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Step 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on the Delete Selected Pages button at the bottom of the Pages panel.</td>
</tr>
<tr>
<td></td>
<td>This will remove the page.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Step 4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on the disclose button at the top right of the Pages panel (Figure 8).</td>
</tr>
<tr>
<td></td>
<td>From the drop down menu, select Duplicate Spread.</td>
</tr>
<tr>
<td></td>
<td>This will create an exact copy of the page, including all the guides.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Step 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Double-click on the first page in the Pages panel to make sure that this is the one you are working on.</td>
</tr>
</tbody>
</table>
Figure 8 InDesign Panel Disclose button

<table>
<thead>
<tr>
<th>Task 8</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save and close the document as <code>guides.indd</code>.</td>
<td>Select **File</td>
</tr>
<tr>
<td></td>
<td>In the <strong>Save As</strong> dialog, save the document as <code>guides.indd</code></td>
</tr>
<tr>
<td></td>
<td><strong>Step 2</strong></td>
</tr>
<tr>
<td></td>
<td>Select **File</td>
</tr>
</tbody>
</table>
6 Working with frames

Within a layer content must be contained within one or more frames. By default frames are rectangular, but in principle they can be any shape and they can contain text or images, although not usually both.

The main properties of a frame are:

- **Size and position:** Frames can be positioned anywhere within a layer and can be adjusted to any width and height.

  A non-rectangular frame is usually assumed to be surrounded by a bounding box of a width and height so as to entirely contain it.

  Sizing and positioning of frames can either be done through dragging with the mouse or by directly specifying values in a panel. Positions on a page are usually identified using X and Y co-ordinates, X being the horizontal position and Y the vertical position. The units used will be those chosen as being your default preferences. The reference position is usually the top left corner of the page, but most DTP applications allow you to change this if necessary.

  You can usually choose to display a horizontal and/or a vertical ruler.

- **Stroke:** This is the line that surrounds the frame. The stroke has a colour, weight (thickness) and style (solid, dashed, etc.) all of which can be changed.

- **Fill:** This is the colour of the inner part of the frame. Fills are either solid (i.e. a single colour) or a gradient where two or more colours blend into each other across the frame.

  If you need an image as the background to text in a frame, you would normally use two frames, one for the text and one for the image, with the text frame above the image frame in the stack order.

- **Inset spacing:** The distance between the stroke and the content. By default this is usually zero.

- **Text wrap:** This determines how text from another frame that overlaps this frame will wrap around.
Figure 9 Frames in a desk top publishing tool
Exercise 4  Working with frames

In this exercise we will open an existing document that has a series of guides already defined. We will use these guides to help correctly insert a number of text and image frames on to the pages.

- Open the guides.indd document from Exercise 3 or open ForExercise4.indd
- Select the Text layer
- Use the Rectangle Frame tool to add frames to the text layer
- Select the Images layer
- Use the Rectangle Frame tool to add frames to the image layer
- Check the frames are on the correct layer
- Move an Image frame to the Text layer (and back again!)
- Save and close the document as frames.indd

Task 1
Open the guides.indd document from Exercise 3 or open ForExercise4.indd

Step 1
Open InDesign
If the Welcome screen appears, close it using the Close button at its top right corner.

Step 2
Select File | Open
In the Open dialog, select either guides.indd (from Exercise 3) or ForExercise4.indd
Click Open.

Step 3
Select View | Fit Page in Window to fill the screen with the page.
If necessary, scroll the document so that the first page is displayed.

Task 2
Select the Text layer

Step 1
Press F7 to display the Layers panel.

Step 2
In the Layers panel, click on the Text row to select it (Figure 10).
**Task 3**
Use the Rectangle Frame tool to add frames to the Text layer as shown in Figure 11

**Step 1**
Study Figure 11.

The area marked by an `I` will be an image frame on the Images layer.

Those areas marked with a `T` will be text frames on the Text layer.
| Step 2 | Make sure the **Tools** collection is visible (Figure 12). The usual position is at the left of the *InDesign* window. If not, click on **Window | Tools**. There are three different orientations of the toolbar: Vertical Horizontal (as shown) Vertical compact You can cycle through them by clicking on the toolbar’s disclose button (see Figure 12) |
|---|---|
| Step 3 | Notice that some tools have a small, black, triangle at the bottom right. These tools are ‘stacked’. To access another tool in the stack, click and hold on the tool to reveal a tool list from which you can select a different tool. Selected tools move to the top of the stack. |

**Figure 12 The tools collection in InDesign**

| Step 4 | Use **View | Grids & Guides | Snap to Guides** to turn on this behaviour (it may already be turned on). |
|---|---|
| Step 5 | Click on the **Rectangle Frame** tool ![Rectangle Frame Tool](image). The mouse pointer will change to a cross hair. |
| Step 6 | Scroll to the first page. Using Figure 11 as a guide, click and drag to create the first text frame on the page. You will find that the guides are ‘snappy’ and will help you get the correct size. |
| Step 7 | When the frame is created, you can adjust the positions of any of the sides by changing to the **Selection** tool (see Task 6) and then clicking and dragging the frame border. |
| Step 8 | Create the remaining five text frames on the first page. Note that the ‘footer’ text frame at the bottom of the page should be aligned to the bleed marks, not the edge of the page. Scroll to the second page and create the five text frames for that page. |
| Task 4 | Select the Images layer | Step 1 | In the **Layers** panel (Figure 10), select the **Images** layer by clicking on it. |
| Task 5 | Use the Rectangle Frame tool to add frames to the Images layer as shown in Figure 11 | Step 1 | Scroll back to the document’s first page. |
|        |                          | **Step 2** | Click on the **Rectangle Frame** tool . The mouse pointer will change to a cross hair. |
|        |                          | **Step 3** | Referring to Figure 11 as a guide, create the frame for the image on the first page. |
| Task 6 | Change back to the selection tool | **Step 1** | To change from the **Rectangle Frame** tool to the **Selection** tool, click on the **Selection tool** in the **Tools** panel. (Or press V key) |
| Task 7 | Check the frames are on the correct layer | **Step 1** | Hopefully, all of your frames are on the correct layer. Our aim was to put the frames for text on the **Text** layer and our frames for images on our **Images** layer. |
|        |                          | **Step 2** | In the **Layers** panel, notice that each layer has an associated colour. This colour is used for the frame colour for frames on a particular layer. Check that each frame has the correct colour for the layer it should be on. If a frame is on the wrong layer, see how to correct it in the next task. |
| Task 8 | Move a Text frame to the Image layer (and back again!) | **Step 1** | Select one of the frames on the Text layer by clicking on it. If necessary, display the **Layers** panel by pressing the F7 key. |
|        |                          | **Step 2** | In the **Layers** panel, the **Text** layer will be highlighted to show that you have selected an object on that layer. Notice the coloured square at the right of the **Text** layer entry in the **Layers** panel (Figure 13). |
|        |                          | **Step 3** | Click and drag the square onto the **Images** layer entry. It will change colour, and the colour of the frame will also change to indicate that it is now on the **Images** layer. |
### Step 4
Click and drag the square back to the **Text** layer to return the frame to its correct layer.

![Layer Indicator](image)

**Figure 13** Layer indicator

<table>
<thead>
<tr>
<th>Task 9</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save and close the document as <strong>frames.indd</strong>.</td>
<td>Select **File</td>
</tr>
<tr>
<td>In the <strong>Save As</strong> dialog, save the document as <strong>frames.indd</strong>.</td>
<td></td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td><strong>Step 2</strong></td>
</tr>
<tr>
<td>Select **File</td>
<td>Close**</td>
</tr>
</tbody>
</table>
7 Working with text

Text on a page is contained within a frame; usually rectangular, but in principle it can be any shape. Text frames can be positioned and sized on an unlocked layer in the same way as any other frame.

7.1. Text threading

If a text frame is not large enough to display all the text contained within it, the extra text is NOT displayed. This non-displayed text is referred to as ‘overset’ (sometimes as ‘overflow’).

A frame with overset text displays a marker at the bottom right corner of the frame. Clearly, it is important to look out for these overset markers – overset text is not printed, and so you could omit important content! Most DTP software will warn you when you have overset text and you ask to create a printed (or PDF) version of the document; it is usually possible to turn this warning off, but it would be unwise.

You can join one text frame to another so that any overset text from one frame flows into the next. This is referred to as text threading. A chain of text boxes can be set up to accommodate as much text as necessary and arranged to suit your document design. Threaded text frames can sit on different pages if necessary.

7.2. Text wrap

Where a text frame overlaps another frame, we can choose to make the text wrap around the other frame. There are usually four text wrap options available:

- **None**: The text ignores the frame and takes its natural position.
- **Around bounding box**: The text flows around both sides of the rectangular frame or its bounding box if it is not rectangular.
- **Around object**: The text follows the outline of the object contained within the frame. This is typically a graphic.
- **Jump**: Text flows around the top and bottom of the frame but not the sides.

Text wrapping works between layers by default, so that text in a frame in one layer can be made to wrap around a frame in another layer.

7.3. Styles

Consistency within a document is a mark of careful and thoughtful design. In a large document of many pages, or even many chapters, keeping text consistent in terms of font, font size, weight, style and colour could become a major headache; for example, a decision to change emphasised text from bold to italic could mean visiting many pages and undoubtedly missing some instances.

Styles are the best way to keep your text consistent with minimal overhead. There are usually a number of types of styles that can be defined:

- Paragraph
- Character
- Table
- Cell
- Object

We will only consider paragraph and character styles here.
Each style has a name and a collection of style attributes. When a style is applied to a part of the document, these attributes are applied. Changing the attributes for a style then automatically affects the relevant parts of the document.

7.3.1. Paragraph styles

The style of a paragraph can be changed in terms of font attributes, alignment, spacing, leading (the space between lines) and more. Direct style changes to paragraphs should be kept to a minimum; it is far better to make changes to named styles and then apply them to the paragraph.

Any collection of paragraph attributes can be given a style name and made available to be applied to paragraphs as needed. Subsequent changes to a named style are then automatically applied wherever that style has been used. So, for example, if you define the style Article Heading as being

- *Lucida Sans*, bold, 14pt,
- aligned centre,
- auto leading,
- 28pt following space

and apply it to all the headings of articles, and then change your mind and want to have these headings

- *italic*

you need only change the style definition – you don’t have to revisit each article heading paragraph.

Most DTP applications allow you to base one named style on another; changes made to the parent style are then followed through into styles based on it. For example, we might base two new styles called Article Heading Odd and Article Heading Even on our Article Heading style above. This would enable us to have two variations of Article Heading: one for odd pages and one for even pages. Perhaps Article Heading Odd would have:

- *aligned right*

and Article Heading Even:

- *aligned left*

with all other attributes inherited from Article Heading. Changes made to the parent style are inherited by child styles, except where the child style has overridden that attribute.

7.3.2. Character styles

In the same way that we have named paragraph styles, we can have named character styles. These enable us to style one or more characters within a paragraph in a controlled, consistent way.

An example of a character style might be to define one called URL and set the style attributes to suit how you want references to web pages to be styled in your document. If you consistently apply this URL style to the references, you can quickly change the style of all of them by simply redefining some of the attributes of the URL style.

You can also usually base one character style on another and then modify it slightly; by changing the parent character style, you will also change the attributes of the child style except where they have been specifically overridden in the child style.
Exercise 5  Working with text

In this exercise we will add text to our Text frames. We will then edit it directly in the frame and through the Story Editor panel.

- Open the frames.indd document from Exercise 4 or open ForExercise5.indd
- Link text frames
- Insert placeholder text into text frames
- Use the story editor to adjust text
- Insert placeholder text in the remaining text frames
- Add the document headlines and titles
- Save and close the document as linkedtext.indd

Task 1
Open the frames.indd document from Exercise 4 or open ForExercise5.indd

Step 1
Open InDesign
If the Welcome screen appears, close it using the Close button at its top right corner.

Step 2
Select File | Open
In the Open dialog, select either frames.indd (from Exercise 4) or ForExercise5.indd
Click Open.

Step 3
Use View | Fit page in window to fit the page in the InDesign window.

Task 2
Link text frames

Step 1
On the first page of the document, select the lower of the two frames in the leftmost column by clicking on it.
Use Object | Content | Text to force the frame to be a text frame.

Step 2
Click the Out Port icon at the bottom right of the frame (Figure 14).
The cursor will change to the Loaded Text cursor.
Step 3
Click anywhere inside the middle frame.

The Out Port will change to indicate it is connected to another frame as will the corresponding In port of the second frame (Figure 15).

InDesign will automatically convert the frame to a text frame.

Step 4
Link the middle text frame to the right-hand text frame in the same way.

Task 3
Insert placeholder text into text frames

Step 1
Click on the first column text frame to select it.

Step 2
Use Type | Fill with Placeholder Text to place dummy text into the text frame.

Notice that the text flows into the other two columns.
### Task 4
Use story editor to adjust text

| **Step 3** | Double-click anywhere inside the block of text. The cursor will become a normal text cursor. Press the RETURN key a few times to insert extra (blank) paragraphs. The text will re-flow in the columns. |
| **Step 4** | Notice that the **Out Port** on the third column has changed to a **+**. This indicates that text has overflowed out of the text box (overset text). When you see this symbol you need to link to another text frame or reduce the text to occupy only the allocated space. |
| **Step 5** | Change back to the **Selection** tool by clicking on the **Selection tool** in the **Tools** panel. (Or press the ESC key) |

### Step 1
Click on the first column of text to select the frame.

### Step 2
Select **Edit | Edit in Story Editor** to display the **Story Editor** dialog (Figure 16). You can resize the **Story Editor** dialog by clicking and dragging its edges.

---

**Figure 16** The Story Editor dialog
<table>
<thead>
<tr>
<th>Task 5</th>
<th>Insert placeholder text in the remaining text frames</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Scroll to the second page.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Select the first frame. Convert the frame to a text frame using Object</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Click on the Outport for the frame and link to the middle frame. Link the middle frame to the third frame’</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>Select the first frame on the page. Fill the frames with placeholder text using Type</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 6</th>
<th>Add the document headlines and titles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Scroll to the first page of the document. Click on the text frame at the top of the page to select it.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Click on the Type Tool [ツ] in the Tools panel. Clicking into the frame at the top of the page. Clicking into a frame using the text tool automatically converts the frame to a text frame.</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Type: Roman Times Note: we will apply a better font and size to the text in the next exercise.</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>Click on the text frame at the top of the second and third columns. Type: Friends, Romans and countrymen, lend me your ears</td>
</tr>
</tbody>
</table>
| Task 7 | Step 5  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Save and close the document as linkedtext.indd</td>
<td>Scroll to the second page.</td>
</tr>
</tbody>
</table>

| Task 7 | Step 6  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click into the frame at the top of the page.</td>
</tr>
<tr>
<td></td>
<td>Type: The Back Page</td>
</tr>
</tbody>
</table>

| Task 7 | Step 1  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select File</td>
</tr>
<tr>
<td></td>
<td>In the Save As dialog, save the document as linkedtext.indd</td>
</tr>
</tbody>
</table>

| Task 7 | Step 2  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select File</td>
</tr>
</tbody>
</table>
Exercise 6  Working with styles

*In this exercise we will define some simple styles and apply them to the document.*

- Open the `linkedtext.indd` document from Exercise 5 or open `ForExercise6.indd`
- Display the Paragraph Style panel
- Adjust and apply the Basic Paragraph style
- Create the Heading 1 paragraph style
- Apply the Heading 1 style
- Create the Document Title paragraph style
- Create the Document Sub Title paragraph style
- Apply styles to the text
- Adjust Text frame padding
- Adjust a style
- Save and close the document as `styles.indd`

**Task 1**

Open the `linkedtext.indd` document from Exercise 5 or open `ForExercise6.indd`

**Step 1**

Open InDesign

If the Welcome screen appears, close it using the Close button at its top right corner.

**Step 2**

Select File | Open

In the Open dialog, select either `linkedtext.indd` (from Exercise 4) or `ForExercise6.indd`

Click Open.

**Step 3**

Use View | Fit page in window to fit the page in the InDesign window.

**Step 4**

Clicking on the Selection tool in the Tools panel.

(Or press the ESC key)

Make sure nothing is selected in the document by clicking on the Pasteboard (the area outside of a document page).

**Task 2**

Display the Paragraph Style panel

**Step 1**

Select Window | Styles | Paragraph Styles from the menu to display the Paragraph Styles dialog (Figure 17).

(The keyboard shortcut for the Paragraph Styles panel is F11.)
Task 3
Adjust and apply the Basic Paragraph style

Step 1
Double click on the [Basic Paragraph] entry in the Paragraph Styles panel.

The Paragraph Style Options dialog will be displayed (Figure 18).

Step 2
From the Options list on the left, select Basic Character Formats.

Make the following changes:

Font Family     Georgia
Size            11 pt
### Step 3

Don’t click on OK yet. Instead, select **Indents and Spacing** from the **Options** list.

Make the following changes:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Line Indent</td>
<td>5 mm</td>
</tr>
<tr>
<td>Space After</td>
<td>2 mm</td>
</tr>
</tbody>
</table>

Click **OK**.

### Step 4

Click on the **Type Tool** in the **Tools** panel.

Click anywhere inside one of the text columns on the first page.

Select all of the text by using
- Windows: `CTRL + A`
- OSX: `CMD + A`

In the **Styles** panel, click on the [Basic Paragraph] entry.

### Step 5

Scroll to the second page and apply the [Basic Paragraph] style to the text in the main columns.

### Step 6

Change back to the **Selection** tool by clicking on the Selection tool in the **Tools** panel.

(Or press the **Esc** key)

Click anywhere on the pasteboard to deselect everything.

### Step 7

Scroll back to the first page.

---

### Task 4

Create the Heading1 style

#### Step 1

Click on the **Create New Style** button at the bottom of the Paragraph Styles panel.

This will create a new paragraph style.

#### Step 2

Double-click on the new paragraph style to open the Paragraph Style Options dialog.

Make the following changes:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Style Name</td>
<td>Heading 1</td>
</tr>
<tr>
<td>Based On</td>
<td>[No Paragraph Style]</td>
</tr>
<tr>
<td>Next Style</td>
<td>[Same Style]</td>
</tr>
</tbody>
</table>

#### Step 3

Don’t click on OK yet. Instead, select **Basic Character Formats** from the **Options** list.

Make the following changes:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font Family</td>
<td>Trajan Pro</td>
</tr>
<tr>
<td>Size</td>
<td>14 pt</td>
</tr>
<tr>
<td>Task 5</td>
<td>Apply the Heading 1 style</td>
</tr>
<tr>
<td>-------</td>
<td>---------------------------</td>
</tr>
<tr>
<td><strong>Step 1</strong></td>
<td>Click on the <strong>Type Tool</strong> in the <strong>Tools</strong> panel.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Click at the end of a paragraph in the middle column of text. Press ENTER to create a new paragraph.</td>
</tr>
</tbody>
</table>
| **Step 3** | Type: **Populi Romani**  
Select the text.  
Click on **Heading 1** in the **Paragraph Styles** panel to apply the style. |
| **Step 4** | Don’t click on OK yet. Instead, select **Basic Character Formats** from the **Options** list.  
Make the following changes:  
- **Font Family**: **Trajan Pro**  
- **Size**: 60 pt |

<table>
<thead>
<tr>
<th>Task 6</th>
<th>Create the Document Title style</th>
</tr>
</thead>
</table>
| **Step 1** | Click on the **Create New Style** button at the bottom of the **Paragraph Styles** panel.  
This will create a new paragraph style. |
| **Step 2** | Double-click on the new paragraph style to open the **Paragraph Style Options** dialog.  
Make the following changes:  
- **Style Name**: **Document Title**  
- **Based On**: ![No Paragraph Style]  
- **Next Style**: ![Same style] |
| **Step 3** | Don’t click on OK yet. Instead, select **Basic Character Formats** from the **Options** list.  
Make the following changes:  
- **Font Family**: **Trajan Pro**  
- **Size**: 60 pt |
<table>
<thead>
<tr>
<th>Task 7</th>
<th>Task 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create the Document Sub Title style</td>
<td>Apply styles to the text</td>
</tr>
</tbody>
</table>

**Step 4**  
Don’t click on OK yet. Instead, select **Indents and Spacings** from the **Options** list.  
Make the following changes:  
- **Alignment**: Centre  
- **Space Before**: 0 mm  
- **Space After**: 0 mm  

**Step 5**  
Click **OK**.

**Step 1**  
Click on the **Create New Style** button at the bottom of the **Paragraph Styles** panel.  
This will create a new paragraph style.

**Step 2**  
Double-click on the new paragraph style to open the **Paragraph Style Options** dialog.  
Make the following changes:  
- **Style Name**: Document Sub Title  
- **Based On**: Document Title  
- **Next Style**: [Same style]  

**Step 3**  
Don’t click on OK yet. Instead, select **Basic Character Formats** from the **Options** list.  
Make the following changes:  
- **Font Family**: Trajan Pro  
- **Size**: 18 pt  

**Step 4**  
Click **OK**.

**Step 1**  
On the first page of the document, select the text frame with text that starts “*Friends, Romans...*” by clicking on it.

**Step 2**  
Click on the **Type Tool** in the **Tools** panel.

**Step 3**  
In the **Paragraph Styles** panel, click on **Document Sub Title**.

**Step 4**  
Change back to the **Selection** tool by clicking on the **Selection tool** in the **Tools** panel.
### Step 5
Select the Text frame with text that contains "Roman Times" by clicking on it.

### Step 6
Click on the Type Tool in the Tools panel.

### Step 7
In the Paragraph Styles panel, click on Document Title.

### Step 8
Scroll to the second page.
Select the text frame containing the text "Back Page".

### Step 9
Click on the Type Tool in the Tools panel.

### Step 10
In the Paragraph Styles panel, click on Document Title.

### Task 9
Adjust Text frame padding

#### Step 1
Change back to the Selection tool by clicking on the Selection tool in the Tools panel.

#### Step 2
Scroll to the first page.
Click on the first column of text to select it.

#### Step 3
Use Object | Text Frame Options to open the Text Frame Options dialog (Figure 19).

#### Step 4
Click on Make all settings the same button in the Inset spacing section of the dialog.
Make the following changes:

<table>
<thead>
<tr>
<th>Top</th>
<th>2 mm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bottom</td>
<td>2 mm</td>
</tr>
</tbody>
</table>

#### Step 5
Click OK.

#### Step 6
Repeat this for the other text columns in the document (six in total).
Task 10
Adjust a style

Step 1
Change back to the Selection tool by clicking on the Selection tool in the Tools panel.

Click on the pasteboard to make sure nothing is selected.

Step 2
In the Paragraph Styles panel, double-click on the Document Title entry to open the Paragraph Style Options dialog.

Step 3
Select Basic Character Formats from the Options list.

Step 4
Change the Font Family to a font of your choice.

Click OK.

You should notice that the change affects the document title and the document sub title. If you are not sure why, ask for an explanation.

Step 5
Press F11 to close the Paragraph Styles panel.

Task 11
Save and close the document as styles.indd.

Step 1
Select File | Save As

In the Save As dialog, save the document as styles.indd

Step 2
Select File | Close
8 Using images

High quality, well-chosen images will usually be an important element in your document. When choosing an image, keep the following in mind:

Format:

There is not time on this course to go into the features of the many different image formats that you might come across – other ITLP courses go into more depth. However, there are essentially two types of image: vector and bitmap.

Vector images are typically diagrams and line art. The format allows for scaling the image to any size without loss of detail. Typical vector formats are:

- Adobe Illustrator (.ai)
- Encapsulated postscript (.eps)
- Scalable Vector graphic (.svg)

Bitmap images are composed of dots each of which has a particular colour value. The higher the number of dots per inch of the image, the greater is the potential detail in that image. Resizing bitmap images must be done with care: enlarging the image reduces the effective number of dots per inch, reducing the visual quality of the image. Reducing the size of the image increases the number of dots per inch, potentially improving the visual quality, but there comes a point where there are too many dots per inch and some are omitted by the printing software. Reducing the physical size of an image on a page usually results in fewer problems than enlarging.

Typical bitmap formats are:

- Joint Photographic Expert Group (.jpeg, .jpg)
- Tagged image format (.tif, .tiff)
- Portable Network Graphics (.png)

Resolution:

Resolution is a measure of the potential detail in an image, and really only applies to bitmap images (are you clear why?). The greater the number of dots the more detail we can expect. High quality, fine detailed printing usually requires 300 dots per inch (dpi), but other factors such as image ‘quality’ are also important (see below).

When sourcing images you should have in mind the approximate size at which they will appear on the page. Take the proposed width (in inches) and multiply by 300 to give the approximate number of dots required across the width of the images, and then use this as a benchmark against which to assess the suitability of a sourced image.

You can find out the dot dimensions of an image in most operating systems by accessing the properties of the image file (use right-click in Windows and Ctrl+click in Mac OSX).

Colour:

Colour is discussed in more detail in the next section. Most images sourced from the web and from image catalogues use the Red-Green-Blue colour mode (RGB), whereas commercial colour printing uses Cyan-Magenta-Yellow-Black (CMYK).

Quality:

Resolution is important in the quality of an image, but it is not the only measure of ‘quality’. Other aspects of an image which contribute to its quality are:

- **Sharp focus** – blurred images are generally unacceptable
**Good composition** – a large topic in its own right, but most of us can identify a well composed image, even if we are not sure what makes it so!

**Appropriate use of colour** – a strongly saturated, colourful image may not sit well in a document that otherwise uses muted pastel colours.

**Suitability:**

Space in your document is usually at a premium and it is important that the images you include add to the document, either in respect of the content or style.

**Copyright and Permissions:**

You must make sure that you have the correct permissions to use an image in the document. Copyright can be a complicated topic, and if in doubt you should seek professional advice; your librarian is usually a good starting point.

You may like to explore the use of images that are offered under the Creative Commons licence scheme (creativecommons.org). These images can be freely used subject to specific conditions.

If you are using images of identifiable people in the document, these images too may be subject to copyright, but in addition you should always check that the person has given permission for the image to be used.

### 8.1. Placing images

In many professional DTP applications images are ‘placed’ in a document rather than ‘inserted’. This may seem a subtle distinction, but usually ‘inserting’ implies that the image becomes part of the document, whereas ‘placing’ implies that the image sits outside the document but is displayed at the appropriate size and position when required.

Inserted images can result in very large digital files; after all we should be using high resolution images, which are very large. This has two effects:

- The document files become cumbersome to pass around for proofreading;
- The computer processing demands are higher, and can result in slower performance.

When we place images in a document, the DTP software usually inserts a low resolution copy (and so small file size overhead) of each image at the correct size and position. This imposes less of a strain on the computer processor, while still enabling us to work on the design of the document. It also means that we can more easily pass the document around for proof reading.

### 8.2. Managing documents containing placed images

We can see from the discussion above that a document that has ‘placed’ images has some advantages, but it does give us something else to think about when we need to deliver the document for printing.

When we want to give a final copy of the document to the print shop, we need to make sure we supply them with all of the associated images. One way to do this is to always ensure that the images and document are in a single folder, and then to deliver the complete folder (perhaps as a zip file).

However, it may be that it is not convenient to have copies of the images in the folder – it may entail needlessly duplicating an image that we reuse in many documents. A better method is to use the ‘packaging’ feature that is present in many DTP applications.
When a document is packaged, the software will create a new folder into which it will copy not only the document and relevant images, but also the fonts used. This folder can then be transferred to a DVD, or hard disk, or cloud-based storage service for delivery to the print shop.

The packaging method assumes that the print shop is happy to receive the document in its native DTP format. If this is not the case, or if this is not practical (perhaps you are not allowed to distribute your fonts in this way), then an alternative is to export the document as a PDF (Portable Document Format) version.

When a PDF is created, the DTP software will use the high resolution originals of all the images to produce a print ready file. There are a few different variations of the PDF format, so you need to liaise with the print shop to ensure you provide a compatible version.
## Exercise 7  Using images

In this exercise you will insert images into frames, adjust the images within the frames and experiment with some of the image adjustments that are available within InDesign.

- Open the `styles.indd` document from Exercise 6 or open `ForExercise7.indd`
- Lock the Text layer
- Place an image in the frame at the top left of the first page
- Resize and reposition the image in the frame
- Insert and adjust a second image.
- Flow text around the image.
- Save and close the document as `images.indd`

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the <code>styles.indd</code> document from Exercise 6 or open <code>ForExercise7.indd</code></td>
<td>Open InDesign</td>
</tr>
<tr>
<td></td>
<td>If the Welcome screen appears, close it using the Close button at its top right corner.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
<th>Select File</th>
<th>Open</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In the Open dialog, select either <code>styles.indd</code> (from Exercise 6) or <code>ForExercise7.indd</code></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Click Open.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3</th>
<th>Use View</th>
<th>Fit page in window</th>
<th>to fit the page in the InDesign window.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Task 2</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lock the Text layer</td>
<td>Press F7 to display the Layers panel</td>
</tr>
<tr>
<td></td>
<td>Click on the empty space to the left of the Text layer label.</td>
</tr>
<tr>
<td></td>
<td>A padlock icon should appear to show that the layer is now locked.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 3</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place an image in the frame at the top left of the first page</td>
<td>In the Layers panel, click on the Images layer to select it.</td>
</tr>
</tbody>
</table>

| Step 2 | Make sure the Selection Tool is selected in the Tools panel. |
|--------| (The Esc key, or the V key are shortcuts) |
|        | On the first page of the document, select the Image frame at the top of the first column by clicking on it. |
### Step 3
Use **File | Place** to display the **Place** dialog.

### Step 4
Select the **statue_head.tif** image and click **Open**.
The image will be placed in the frame, but at a size determined by **InDesign** based on the image properties.

### Step 5
Right click on any part of the image to display the shortcut menu.
Select **Fitting | Fill Frame Proportionally**.
The image will be resized to fill the frame while retaining its correct aspect ratio – this means that not all of the image will be contained within the frame.

### Task 4
Resize and reposition the image in the frame

#### Step 1
Click on the **Direct Selection Tool** in the **Tools** panel.
This tool enables you to select objects within a frame.

#### Step 2
Click anywhere inside the image to select it.
Notice that the selection border extends beyond the frame – only the parts of the image inside the frame are visible (Figure 20).

#### Step 3
Hold down the **SHIFT** key, click and drag the bottom right hand corner of the selection frame (Figure 20) to resize the image.
Make the image larger.

---

**Figure 20** Directly Selected image
<table>
<thead>
<tr>
<th>Task 5</th>
<th>Step 1</th>
<th>Scroll to the second page of the document.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert and adjust a second image</td>
<td>Step 2</td>
<td>Lock all of the layers except the <strong>Images</strong> layer. To lock a layer click to the right of the eye symbol in the <strong>Layers</strong> panel – a padlock will appear.</td>
</tr>
<tr>
<td></td>
<td>Step 3</td>
<td>Select the <strong>Rectangle Frame</strong> tool.</td>
</tr>
<tr>
<td></td>
<td>Step 4</td>
<td>Click and drag a square frame that sits on top of the two rightmost columns and is the same width as two columns.</td>
</tr>
<tr>
<td></td>
<td>Step 5</td>
<td>Select the <strong>Selection Tool</strong> and click on the new frame to select it.</td>
</tr>
<tr>
<td></td>
<td>Step 6</td>
<td>Use **File</td>
</tr>
<tr>
<td></td>
<td>Step 7</td>
<td>Right-click within the frame and from the menu that appears, select **Fitting</td>
</tr>
<tr>
<td>Task 6</td>
<td>Step 1</td>
<td>Use **Window</td>
</tr>
<tr>
<td>Flow text around the image</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Step 2**

*InDesign* can only flow text around images for which it can detect an outline. Typically these are images which have a transparent (alpha channel) layer, for example images from other *Adobe CS* applications such as *Illustrator* or *PhotoShop*, or suitably formatted PNG image files.

![Image of Text Wrap dialog]

**Figure 21** The Text Wrap dialog

**Step 3**

For this image, set the options in the dialog to be the same as those shown in Figure 21.

You will need to change:

- **Wrap option**: Wrap around object shape
- **Offset**: 5 mm
- **Wrap to**: Both Right & Left Sides
- **Type**: Alpha Channel

**Step 4**

Click and drag the image to achieve a good balance between readability and text wrapping.

**Task 7**

Save and close the document as *images.indd*.

**Step 1**

Select **File | Save As**

In the **Save As** dialog, save the document as *images.indd*

**Step 2**

Select **File | Close**
9 Using colour

9.1. Colour technologies

Document creation involves two different colour technologies: screen and print. When we see an image on screen, whether it is a monitor, TV screen or projector, the colours are made up by combining amounts of red, green and blue (RGB) light. This is referred to as additive colour and you are probably familiar with the way the different colours combine:

![Additive Colour](image)

**Figure 22 Additive Colour**

However, in print, images are produced by a process of subtractive colour, using cyan, magenta and yellow (CMY) inks. This will be familiar to you from your school days when you mixed paint:

![Subtractive colour](image)

**Figure 23 Subtractive colour**
Unfortunately, the composition and quality of ink means that the combination of cyan, magenta and yellow doesn’t produce a good black – it is usually a muddy brown – and so a fourth, black, ink is used to accurately produce black and its shades of grey. Hence the system is referred to as CMYK (K for Black, so as not to confuse B with Blue!)

The two very different colour ‘technologies’ mean that achieving a match between on-screen and printed colours can be difficult. If you display the same colour image on two different screens side-by-side, they will often look different – which one will be closest to the printed version?

The only way to ensure that on-screen and printed colours are the same is to calibrate both the screen and the printer against a standard. This can be done, and it is done in the professional printing industry, but it is time consuming and expensive.

For most in-house document design the most pragmatic route is to create test prints at important stages of the design process and make corrections as necessary. Usually we are not too concerned if the on-screen and printed colours are not identical, as long as they are close.

9.2. Using colour in a document

When using colour in a document, most DTP applications allow you to use either the RGB or CMYK colour models – noting of course that whichever model you choose there is no guarantee that the colour you see on-screen is exactly the colour you see when printed.

If you are designing your document for use on-screen, perhaps as a PDF, then you might choose to work in RGB. However, for documents that will be printed you should consider working in CMYK.

If you choose to work in RGB for printed documents, then colours will be translated to their CMYK equivalents automatically at some point in the print process. Conversion between RGB and CMYK is close, but not exact.

9.3. Swatches and Palettes

Just as with text styles, consistency in the use of colour is a mark of a well-designed document. Rather than apply colours individually as and when needed, and running the risk of using the incorrect colour by mistake, it is better to use a palette, or collection of swatches.

A palette is a collection of colours that you can choose from. Individual colours, called swatches in some applications, can be defined and named. Applying a colour by name means that if its definition changes (i.e. we change the colour) then wherever that named colour has been used, the colour is changed automatically.

Some DTP applications make predefined palettes available based on standard colour collections such as those from Pantone.

9.4. Colours in images

If you source your images from a scanner, camera, or an image library then most likely your images will be described using an RGB colour model. As discussed, professional printing prefers images in the CMYK model.

Some image software will convert RGB images to their CMYK equivalent either directly (as in Adobe Photoshop) or through a plug-in (such as the Separate+ plug-in for GIMP).
### Exercise 8  Using colour

This exercise will get you to create a colour swatch and then apply that colour to objects in the document.

- Open the `images.indd` document from Exercise 7 or open `ForExercise8.indd`
- Create a colour swatch for Oxford Blue
- Change the text colour for the Document Title style
- Change the line (stroke) colour for a frame
- View the document in Preview mode
- Save and close the document as `colours.indd`.

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the <code>images.indd</code> document from Exercise 7 or open <code>ForExercise8.indd</code></td>
<td>Open InDesign</td>
</tr>
<tr>
<td>If the Welcome screen appears, close it using the Close button at its top right corner.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select File</td>
</tr>
<tr>
<td>In the Open dialog, select either <code>images.indd</code> (from Exercise 7) or <code>ForExercise8.indd</code></td>
</tr>
<tr>
<td>Click Open</td>
</tr>
<tr>
<td>(If you are prompted to update the links to the images, you should go ahead)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use View</td>
</tr>
<tr>
<td>to fit the page in the InDesign window.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a colour swatch for Oxford Blue</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Window</td>
</tr>
<tr>
<td>to display the Swatches panel (Figure 24).</td>
</tr>
<tr>
<td>The shortcut for the Swatches panel is F5</td>
</tr>
</tbody>
</table>

**Figure 24** The Swatches panel
Step 2
Click on the disclose button at the top right of the panel (Figure 24) to display the **Swatches** menu. Choose **Select All Unused**

Step 3
Click on the **Delete Swatch** button at the bottom right of the panel.

Step 4
Click on the **Black** entry in the list of swatches. Click on the **New Swatch** button at the bottom of the panel.
This creates a copy of the Black swatch.

Step 5
Double-click on the **Black copy** swatch to open the **Swatch Options** dialog (Figure 25). Change the **Swatch Name** to **Oxford Blue**

Step 6
The colours that make up Oxford Blue in the CMYK colour mode are:

<table>
<thead>
<tr>
<th>Colour</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyan</td>
<td>100%</td>
</tr>
<tr>
<td>Magenta</td>
<td>80%</td>
</tr>
<tr>
<td>Yellow</td>
<td>0%</td>
</tr>
<tr>
<td>Black</td>
<td>60%</td>
</tr>
</tbody>
</table>

Set the four colour sliders to have the above values. Click **OK**.

Step 7
Notice that **Oxford Blue** is now an entry in the list of colours.
<table>
<thead>
<tr>
<th><strong>Task 3</strong></th>
<th><strong>Step 1</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the text colour for the Document Title style</td>
<td>Press F11 to display the <em>Paragraph Styles</em> panel.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Double-click the <em>Document Title</em> style in the list.</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>In the list of options, select <em>Character Colour</em>.</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>Select <em>Oxford Blue</em> from the list. Click <strong>OK</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Task 4</strong></th>
<th><strong>Step 1</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the line (stroke) colour for a frame</td>
<td>Scroll to the first page in the document.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>If the <em>Layers</em> panel is not visible, press F7 to display it. Make sure the <em>Images</em> layer is selected in the <em>Layers</em> panel, and unlocked.</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Click on the image at the top left of the page to select the frame.</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>In the panel list click on <em>Stroke</em> to display the <em>Stroke</em> panel (or use the F10 key). Make the following changes: <em>Weight</em> = 2 pt.</td>
</tr>
<tr>
<td><strong>Step 5</strong></td>
<td>Display the <em>Swatches</em> panel by pressing F5. At the top left of the panel, identify the <em>Fill and Stroke</em> button . Click on the <em>Stroke</em> part of the button to bring it to the front.</td>
</tr>
<tr>
<td><strong>Step 6</strong></td>
<td>Click on the <em>Black</em> swatch entry.</td>
</tr>
<tr>
<td>Task 5</td>
<td>Change the fill colour for a frame</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------</td>
</tr>
</tbody>
</table>
| **Step 1** | Press `F7` to display the **Layers** panel.  
In the **Layers** panel, lock the images layer by clicking to the right of the **Eye** symbol.  
Unlock the **Text** layer by clicking on the padlock symbol |
| **Step 2** | Select the frame at the foot of the page by clicking on it. |
| **Step 3** | Display the **Swatches** panel by pressing `F5`.  
At the top left of the panel, identify the **Fill and Stroke** button.  
Click on the **Fill** part of the button to bring it to the front. |
| **Step 4** | Click on the **Oxford Blue** swatch. |

<table>
<thead>
<tr>
<th>Task 6</th>
<th>View the document in Preview mode</th>
</tr>
</thead>
</table>
| **Step 1** | Click anywhere on the pasteboard to make sure nothing is selected.  
In the **Tools** panel, click and hold on the **View** button.  
Choose **Preview** from the menu that appears. |
| **Step 2** | When you have checked the line colour around the frame is correct, click on the **Normal** view button. |

<table>
<thead>
<tr>
<th>Task 7</th>
<th>Save and close the document as <strong>colours.indd</strong>.</th>
</tr>
</thead>
</table>
| **Step 1** | Select **File | Save As**  
In the **Save As** dialog, save the document as **colours.indd** |
| **Step 2** | Select **File | Close** |
10 Printing

It is possible to print directly from within any desk top publishing application. The process is usually the same as for other applications: you choose the print option and then specify parameters such as the paper size and orientation.

Where possible, you should design your document at the size you will print it. Leaving printer drivers to scale the document up or down to fit on a page can give less than ideal results. However, it is often useful to print an A4 version of a larger document (perhaps a poster) for proofreading the text.

More often, you will save the document in the Portable Document Format (PDF), perhaps for delivery to a print shop for professional printing. PDF was developed by Adobe and has become the de facto standard for document distribution. There are several variations of PDF, more than we have time to cover here, each of which has a particular history or purpose.

PDFs contain all the text, font and image content of the document, ready for direct printing. This avoids the problem discussed earlier (see section 8.2) where some DTP applications contain links to images rather than having them embedded, and where the recipient may not have the same fonts installed as were on the design computer.

If you are using PDF as a simple way of sharing your document informally with colleagues, then the ‘out of the box’ PDF variation that the DTP tool suggests should be perfectly acceptable. If you are sending your document for professional printing, you should seek the advice of the print shop technicians.

There is one practical printing issue that is worth noting here. Standard office ink jet and laser printers are rarely able to print to the edge of the paper – there is usually a narrow ‘unprintable margin’. This means that if you have designed your document with content that goes to the edge of the page, you will find either:

- The content in the ‘unprintable margin’ is lost, or
- The document is scaled to fit on the page within the unprintable margins.

Neither of these is ideal. If it is important that you get a full-size print right to the edge of the paper you usually have no option but to get the document professionally printed.
## Exercise 9  Creating a PDF version of a document

This exercise will get you to export your document in the Portable Document Format (PDF).

- Open the `colours.indd` document from Exercise 8 or open `ForExercise9.indd`
- Export the document as a PDF version using the default options.

### Task 1
Open the `colours.indd` document from Exercise 8 or open `ForExercise9.indd`

### Step 1
Open InDesign.

If the Welcome screen appears, close it using the Close button at its top right corner.

### Step 2
Select File | Open.

In the Open dialog, select either `colours.indd` (from Exercise 8) or `ForExercise9.indd` and click Open.

### Step 3
Use View | Fit page in window to fit the page in the InDesign window.

### Task 2
Export the document as a PDF version using the default options.

### Step 1
Use File | Export to open the Export dialog.

### Step 2
Select Adobe PDF (Print) from the Save as type drop down list and then click Save.

The dialog has many options. Unless you have good reason to adjust the defaults, leave them as they are.

Click Export.

### Step 3
You may see a warning about overset text. Normally you would return to the document to fix this, but here you can just continue.

### Step 4
After a short delay, your PDF document will be displayed in a PDF viewer.

Close the viewer.

### Step 5
In Windows:
Select File | Quit

In Mac OSX:
Select InDesign | Quit InDesign
11 The finished document

If you work through the exercises you should produce a document which looks similar to the one below. Not all of the steps have been given to complete it – this is left as an exercise for you, and as an opportunity for you to experiment!
12 What Next?

We hope you have enjoyed this session and found it useful. If you attended a taught session you will get sent an email with a link to a web page to give us anonymous feedback. We always value your feedback and use it to improve our sessions.

You may like to consider the following options to follow on from this session.

12.1. Other digital image sessions

The following courses offered through the IT Learning Programme also cover aspects of using digital images:

- Digital images: Concepts
- Digital images: GIMP – an introduction
  Digital images GIMP – further techniques
- Digital images: Photoshop – an introduction
  Digital images: Photoshop – further techniques
- Illustrator: Introduction

12.2. Computer8

We encourage everyone to work at their own pace. This may mean that you don’t manage to finish all of the exercises for this session. If this is the case, and you would like to complete the exercises while someone is on hand to help you, come along to one of the Computer8 sessions that run during term time. More details are available from www.it.ox.ac.uk/courses/

12.3. IT Services Help Centre

The IT Services Help Centre is at 13 Banbury Road. You can use the facilities to work through the exercises in this booklet, or use any of the applications that are available.

The Help Centre is also a good place to get advice about any aspect of using computer software or hardware. You can contact the Help Centre on (2)73200 or by email on help@it.ox.ac.uk

12.4. Downloadable course materials (WebLearn)

These course materials, plus the files you need to complete the exercises, are available through the ITLP Portfolio at portfolio.ox.ac.uk. Some resources are only accessible in you are a member of the University, in which case you will need to provide your Oxford (SSO) username and password.
Your Notes:
InDesign
An introduction

Dave Baker
david.baker@it.ox.ac.uk

Your safety is important

Your teacher is Dave Baker
david.baker@it.ox.ac.uk
We finish at
You should have Some ideas!
You will have Course handbook

Your comfort is important

Where is the fire exit?
Beware of hazards:
  Tripping over bags and coats
Please report any equipment faults to us
Let us know if you have any other concerns

The toilets are along the corridor outside the lecture rooms
The rest area is where you registered
The swivel seats are adjustable
You can adjust the monitors for height, tilt and brightness

Your comfort is important

The toilets are along the corridor outside the lecture rooms
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You can adjust the monitors for height, tilt and brightness

Your comfort is important

The toilets are along the corridor outside the lecture rooms
The rest area is where you registered
The swivel seats are adjustable
You can adjust the monitors for height, tilt and brightness
Four features make InDesign special

Layers  Frames  Text threading  Guides & bleeds

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Any questions?

And there’s more...

- Style text
- Tiger image
- Managing images
- Background image
- Colours
- Saving
- Exporting

Any questions?

Your turn again...