

ECAC-SIDA Advanced InDesign Panel – Lauren Ferrett, Wellesley College

Working With Long Documents

Design Template

Pre-sets the formatting for all future documents, allows for a consistent look and feel in all pages, sets up document for automated table of contents. Allows multiple users to work on parts of a document.

- Set the dimensions, margins, columns
- Set the master pages, object libraries, layers
 - If your document requires more than one layout grid, create multiple master pages
 - Placing recurring design elements and placeholder frames
 - Create an object library with frequently used design elements
 - Set up any necessary layers to organize the template into logical parts
- Create color swatches
- Create styles
- Set long document elements

Styles

A character style is a collection of character formatting attributes that can be applied to text in a single step. A paragraph style includes both character and paragraph formatting attributes, and can be applied to a paragraph or range of paragraphs.

- When you change the formatting of a style, all text to which the style has been applied will be updated with the new format.
- [Basic Paragraph]
 - Default style applied to text
 - Can edit, but can't rename or delete
- Defining Styles
 - Panels for both character and paragraph styles
 - Select create new style from the panel menu
 - Select all options for styles
- Adding Styles
 - Highlight text and select style
 - Style overrides
 - Designated with a "+" next to the style name
 - Option click on the style to clear overrides

Master Pages

By default, any document you create has a master page. You can create additional masters from scratch or from an existing master page or document page. After you apply master pages to other pages, any changes made to the source master carry forward to the masters and document pages that are based on it. With careful planning, this provides an easy way to make layout changes to multiple pages across your document.

- Master pages show at the top of the pages palette
 - A-Master is the default master
 - Shows left-sided and right-sided pages
 - Duplicate masters can be created for different types of pages
- To create a master from a page already made, drag the spread into the masters panel
- To create a page from a master, drag the master into the page spread
- Overriding master pages
 - Ctrl+Shift (Windows) or Command+Shift (Mac) and click object

- Delete from page, but not master
- Change set object, text

Creating Documents from the Template

- Finalize template
 - Remove unnecessary elements
 - Save as template (drop down menu)

Now that your template is created, you can simply open the template to create a new, untitled document based on the created template.

- Add the template icon to your dock or Desktop to give easy access to creating a new document based on the template.

Putting it all together... Books

Once you have all the pieces of your publication, it's time to combine them into a book. A book file is a collection of documents that can share styles, swatches, master pages, and other items. You can sequentially number pages in booked documents, print selected documents in a book, or export them to PDF. One document can belong to multiple book files.

- Style Sources
 - One document in the book is the style source, others can be synchronized to that style.
 - Documents based on templates remove the need to synchronize styles
- Creating a book file
 - Choose File > New > Book.
 - Type a name for the book, specify a location, and then click Save.
 - Book panel appears... do not close!
 - The book file is saved with the file name extension .indb.
 - Add documents to the book file.
- Page numbers
 - Can be added automatically or can change throughout the book, depending on chapters
 - To change, click the triangle icon over the page in the pages panel

Automatic Table of Contents

InDesign has a Table of Contents function that collects text from your document that has specific paragraph styles attached, organizes text in an order, and formats using styles and settings you specify. In order to generate a valid TOC, paragraph styles must be used consistently!

TOC Function also creates PDF Bookmarks

- Choose Layout > Table Of Contents.
 - Title box, text will appear at the top of the table of contents.
 - Include Book Documents
 - Add Paragraph Styles to include them in the TOC
 - Specify options to determine how each paragraph style in the table of contents is formatted
 - Page number, entry style
 - "Between Entry And Number" By default ^t places a tab between the TOC entry and the number
 - To add tab leaders ".....":
 - Click on the Tabs option in the paragraph style
 - Select the right justify icon and click on the ruler to position the tab stop.
 - Specify a "." as the leader
 - Click into the area of your document where you want to add the TOC