

MANCHESTER | URBAN DESIGN | LAB

MUD-Lab Toolkit Adobe InDesign Explained

InDesign is the layout software we will use to put together our graphics and create our story board. It is a part of the Adobe Creative Suite and so it is compatible with Photoshop and Illustrator. The software has the ability to produce high quality yet small size PDFs to be used either as interactive online materials or as ready to print files. This handbook is an introduction to the software.



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To reference this MUD-Lab Toolkit please use the following:

'Manchester Urban Design LAB (2020) '*MUD-Lab Toolkit: Adobe InDesign Explained*' accessible at www.seed.manchester.ac.uk/mudlab

INTRODUCTION TO INDESIGN (ID)

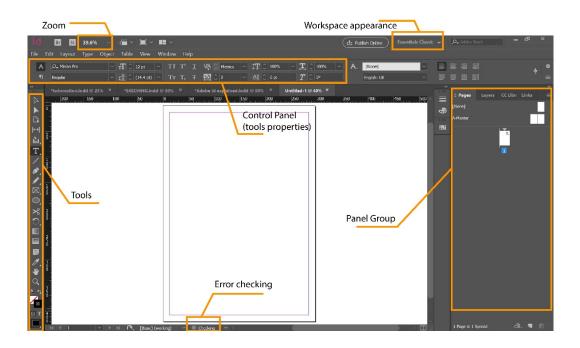
Adobe InDesign (Id) is a vector based desktop publishing software application. It is used by graphic and web designers to create works such as posters, flyers, brochures, magazines, newspapers and books. Adobe InDesign can create digital artwork for all kinds of media: print, web, interactive and mobile.

Adobe InDesign unlike other software packages within the Adobe Creative Suite is not limited to one specific graphical input. Users can import and place Raster (bitmap) Graphics as well as Vector Graphics. Nevertheless, it is worth remembering that Raster (bitmap) Graphics unlike Vector Graphics cannot be rescaled without affecting the quality of the images. Rescaling raster graphics will cause them to become pixelated.

For an excellent introduction to the software please see the video tutorials:

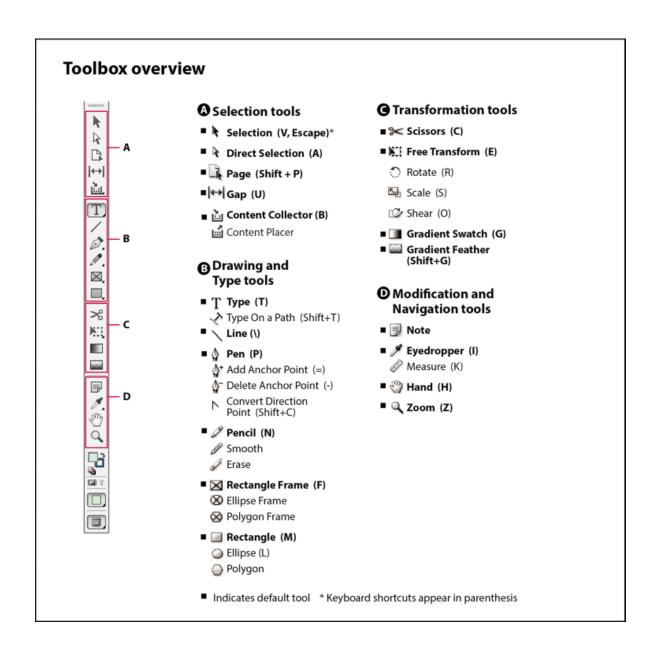
https://www.youtube.com/watch?v=iHDy_nEvgd4&list=PLYfCBK8IplO7YoUHtYKxavLHO-31C-Vky

Adobe InDesign Interface



Introduction to InDesign Tools

 InDesign features a variety of tools enabling you to create, edit and manipulate your page/s including: selection tools, drawing and type tools, transformation tools as well as modification and navigation tools.

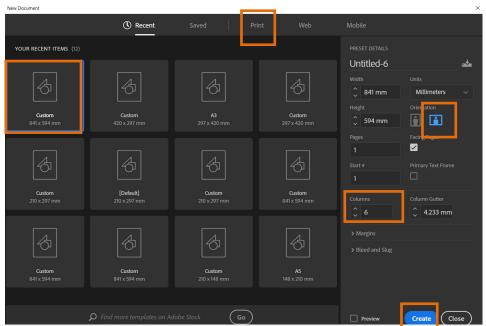


For further information on all of these tools please see https://helpx.adobe.com/indesign/using/toolbox.html.

DOCUMENT SET-UP

Setting up a New Document: Introduction

• Launch InDesign, when it opens click **File>New (Ctrl+N)** or click on **Create a New File**. You will be presented with the New Document window below. Just as in Adobe Ai, go to Print, view all presets, select custom size and create a new A1 custom size (841*594). Make the orientation landscape. Create six columns.



New Document window

This window will enable you to set up the pages on which you will create your portfolio. A description of the components contained within this window are outlined below:

Document Preset

This is where your stored presets are kept.

Intent

You can select whether you are creating a document for Print, Web or Digital Publishing (Stick with Print for now).

Facing Pages

Ticking this option allows you to work on two pages at once side by side. Keep this

ticked for now.

Primary Text Frame

Checking this option automatically draws you a text box on the Master Page. The Master Page is a special page which when altered effects every other page in the document. Keep unchecked for your purposes.

Columns

Columns are the purple guides placed on your page to assist you in laying out your document.

Gutter

The Gutter is the amount of space between each column.

Margins

Margins are guides placed around the edges on the inside of your document.

Bleed

The Bleed area allows you to print objects that are arranged at the outer edge of the defined page size*.

Slug

The Slug area is discarded when the document is trimmed to its final page size*.

*Objects outside the Bleed or Slug area (whichever extends farther) do not print.

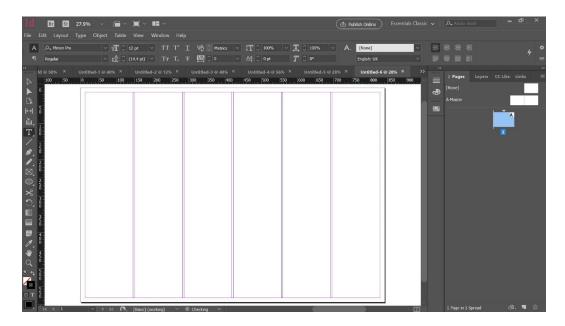
Make All Settings the Same (Chain Link Logo)

This icon when selected allows you to change all margins/bleeds etc. simultaneously. Deselecting it allow you to edit each margin/bleed individually.

If you are confused about any of these please do not worry as they are not tremendously important. Should you want any further information on any of the options within the New Document window please see: http://helpx.adobe.com/indesign/using/create-new-documents.html#new_document_options

Setting up a New Document: Selections

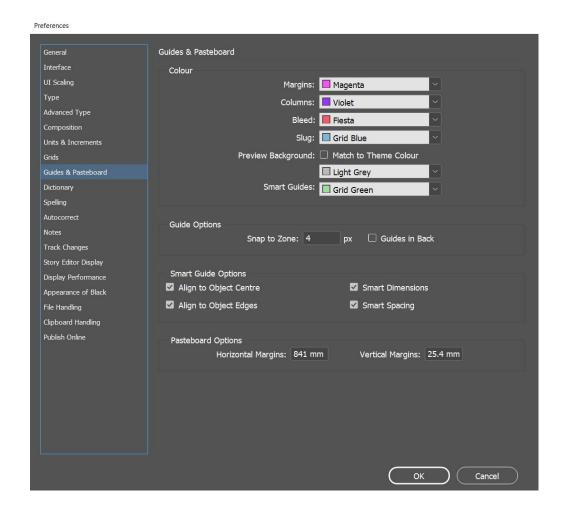
• After hitting Create you will now be presented with a document similar to below:



- You have now created an A1 landscape document with six guiding modules to ease
 the layout process simple as that. Please feel free to play around with the New
 Document settings so as to understand their editability (adding pages, columns and
 amending margins sizes etc.).
- Should you wish to change or amend your document at any point following your selection, you can do so by clicking Layout>Margins and Columns.
- OR you can click File>Document Set Up (Alt+Ctrl+P)

Guides and Pasteboard

 Your screen will appear with Guidelines. These lines represent the different components of your page structure i.e. Margins, Columns and Smart Guides. Hit W to hide/show them. To edit them Click>Edit>Preferences>Guides and Pasteboard, you will the following window.

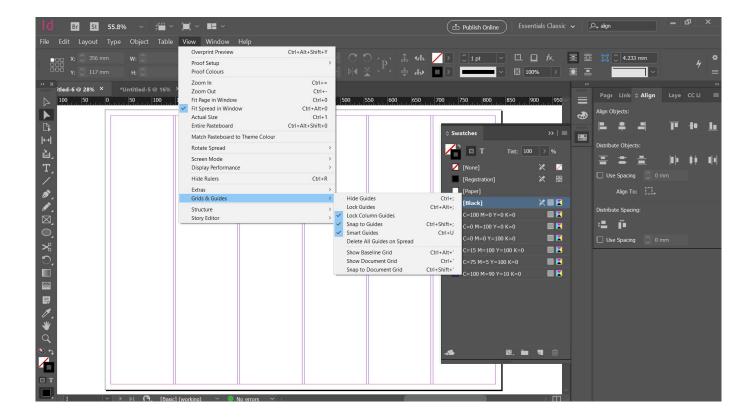


- This Window provides you with a clear description as to what each colour represents.
 The Colour of these Guidelines can be changed by clicking the corresponding drop down arrow.
- You can also **Edit** the **Smart Guide Options** in this **Window**.

Using Guides and Grids

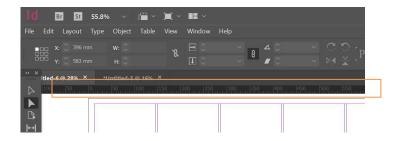
- Guides are an essential tool in InDesign. Using guides can help speed up the design process whilst also ensuring accuracy.
- There exist a variety of different guide types to choose from, click View>Grids and
 Guides.





- Turn Smart Guides and Snap to Guides on, these will assist with layout, allowing you
 to click the text boxes and images next to your rulers, columns and margins. They
 also create a snap-to function when placing images/maps.
- The two Lock Guides stop you from accidently moving/editing your guides. Use of these depends on personal choice.
- To Hide / Display Guides click Ctrl+; Hiding guides is useful if you wish to see the document design.
- The **two Gird Options** will also assist with layout (similar to Ai and Ps). To select these simply click on them.

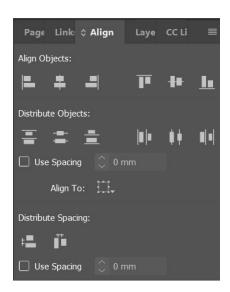
Using and Editing Rulers



- To show rulers click View>Hide/Show Rulers. Editing the ruler start point gives you
 greater control over your document layout. It is also quite useful if you want an
 object to be a particular size (scale) or distance from another object.
- To edit the ruler start point simply select the Selection Tool (V)>Click on the Top Left
 Corner of the Ruler>and Drag to where you would like your measurements to start from.
- Right click on the ruler to change its units.

Align

- As with Ai, Id has an Align function, which along with Snap-to (discussed above), can greatly assist and speed up the Layout Process. Go to Window/Object and Layout/Align to show the align panel.
- This Function will allow you to Align all of the Text Boxes/Images/Objects contained within your Document.

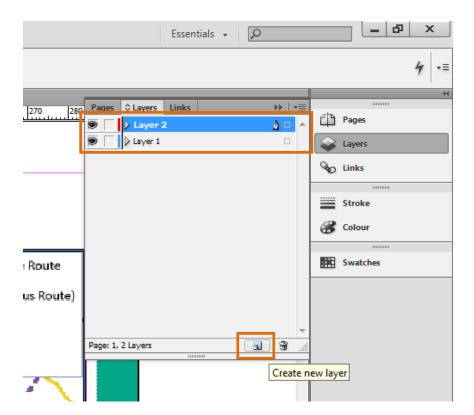


Layers

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Import/Object/Image (you can actually create the whole Id document on one Layer without the need for any other layers).

• The main reason you would use Layers in Id is if you want to overlay one Import/Object/image over another.



 As always Label your Layers – simply double click on the text and rename appropriately.

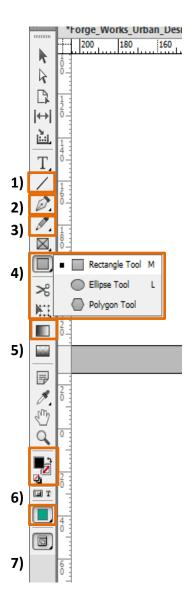
Undo/Redo and Zoom In/Out

- Click Crtl+Z for Undo and Shift+Ctrl+Z for Redo.
- Click Ctrl+ for Zoom In and Ctrl- for Zoom Out.

LAYOUT

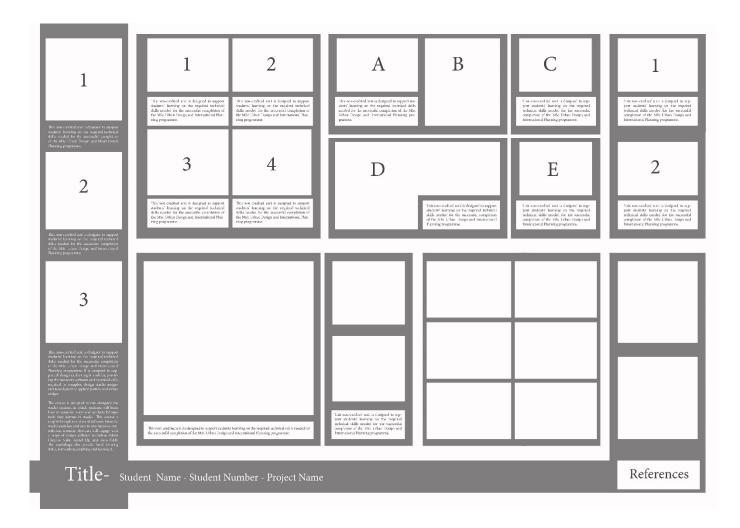
Page Layout and Pages

Creating a Page Layout in InDesign is very easy all that is required is the use of a couple
of Tools (you will already be familiar with these how these tools work from Ai):

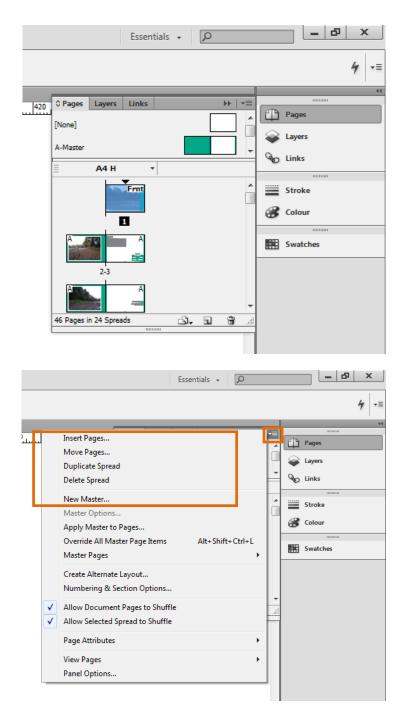


- 1) Line Tool Drawing Lines (or Annotating). However, I would advise you to annotate in Ai.
- 2) Pen Tool Creating shapes etc.
- 3) Pencil Tool.

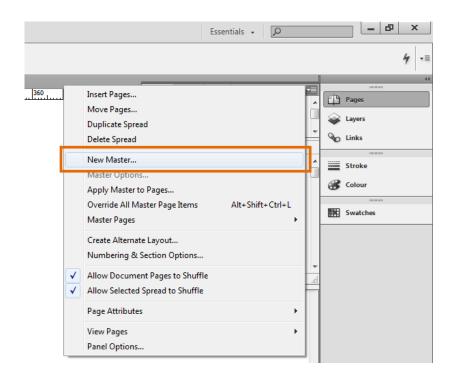
- 4) Shape Tools To create Banner Boxes etc.
- 5) Gradient Tool.
- 6) Fill and Stroke.
- 7) Apply Colour / Gradient.
- With these tools you can create something like this:



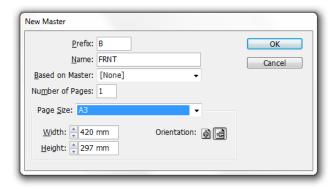
When you have created a Page Layout you can easily Duplicate it to make up your document. To do this Click Window>Pages (F12)>Click Expand Options>Duplicate. You can also Insert, Delete or Move Pages in the ExpandOptions Window.



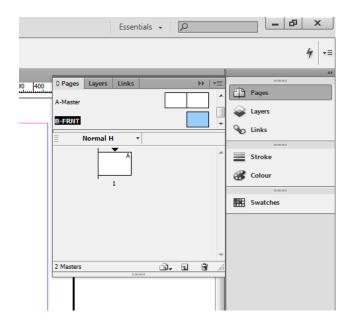
- Uncheck Allow Documents Pages to Shuffle, and Allow Select Spread to Shuffle
- InDesign also has a Master Page feature, this feature will allow you to create a separate editable Layout/Spread to your normal page layout. On the Expand Options Window>Click New Master:



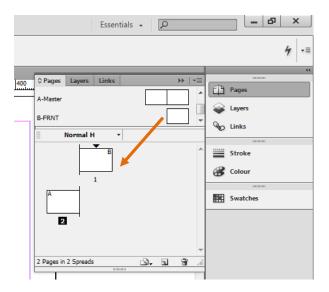
In this Window I can choose how I want my Master Page to look>so I name it FRNT
as it is the Front Cover>Based on NONE>1 Page>Size A3 or
A1...etc.>Landscape>OK.



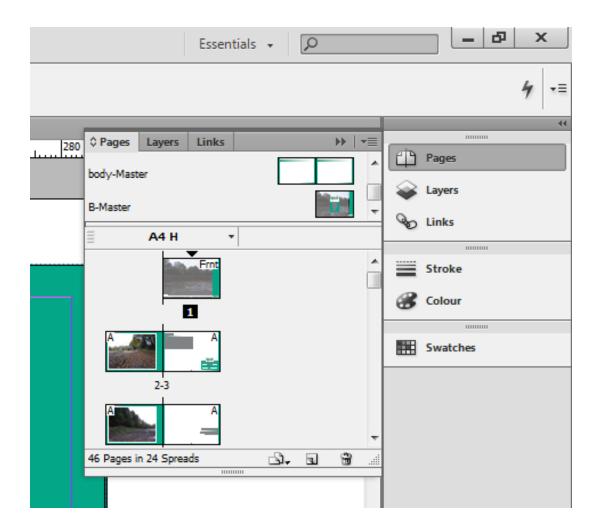
 You will see the following display on Page Panel and a New Master Page will have been created:



Click on the B-FRNT Page and Drag it below A1 then Drag A1 below B-FRNT:



- The B-FRNT Master Page was hidden/separate from the rest of your pages. By **Dragging** it,
 it is now visible alongside the rest of the pages on screen. Play around with Master Pages to
 get used to it these settings.
- When you do you will be able to create different Page Layouts and Page Spreads like below:



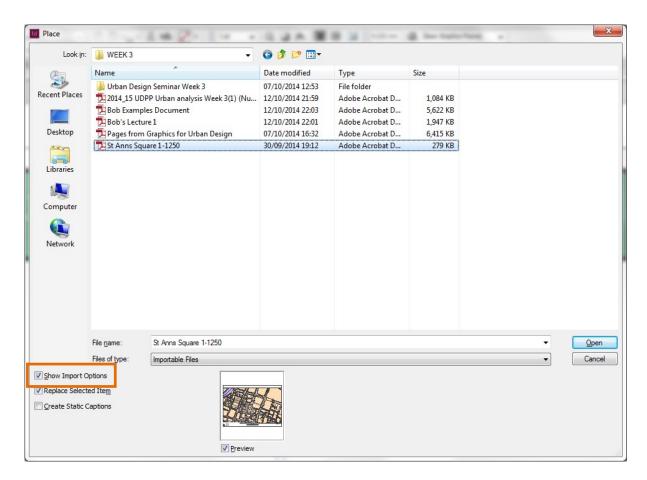
For additional information on Pages/Layout including Master Pages please see:
 http://helpx.adobe.com/indesign/using/pages-spreads.html

Insert Page Number and Contents Page

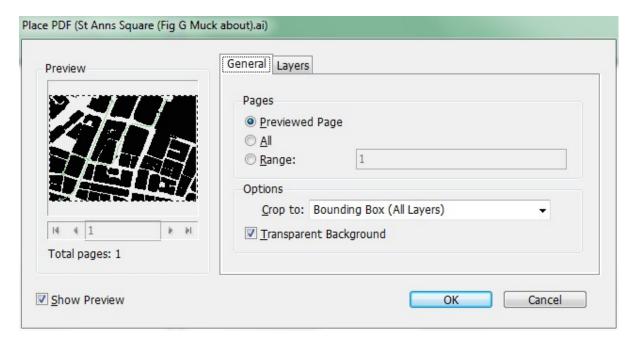
- To insert Page Number please see: http://helpx.adobe.com/indesign/using/layout-design-9.html
- To insert a Contents Page please see: http://helpx.adobe.com/indesign/using/creating-table-contents.html

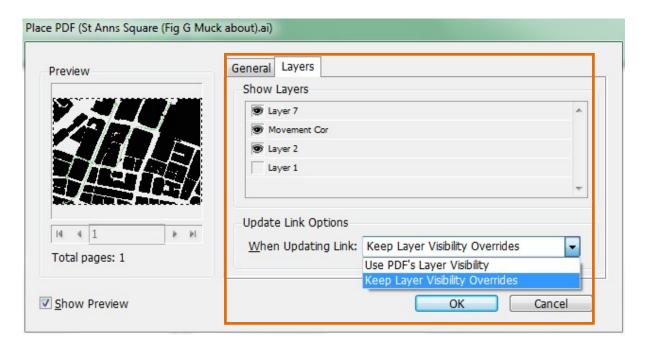
Placing Images/Maps/Graphics/Objects

To import an image or map etc. to InDesign click File>Place (Ctrl+D). Please also select
 Show Import Options as this provides you with greater control as to what you import.

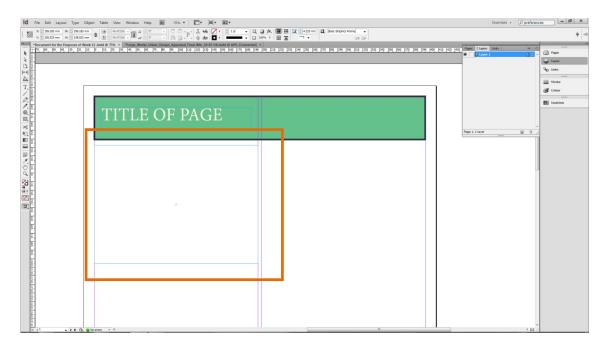


By ticking Show Import Options an additional window will pop up:

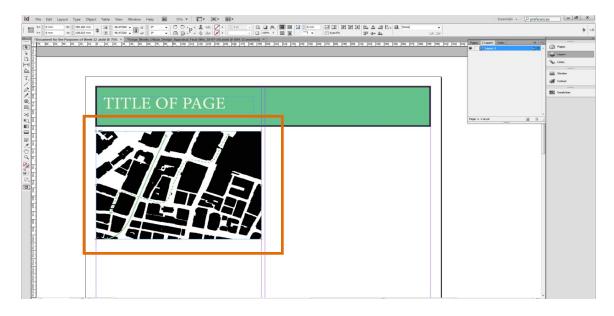




- The Show Import Options Window will allow you to preview the Import, select a Cropping
 Area, keep a Transparent Background as well as choose the Layers you wish to Import. It
 is an extremely useful Window but the settings can take a little getting used to so do have
 a bit of a mess around with it.
- InDesign is compatible with both Vector and Bitmap files and can easily handle large PSD, All or Layered PDF files. It is this compatibility as well as the robustness of the software which make it the ideal tool for large document design. Unlike Word or Publisher which will crash and lag as the file size gets bigger.
- When you are happy Click OK.
- You will see a mini version of your selection>Click and Drag so that the Import fits your
 Column Width (below).

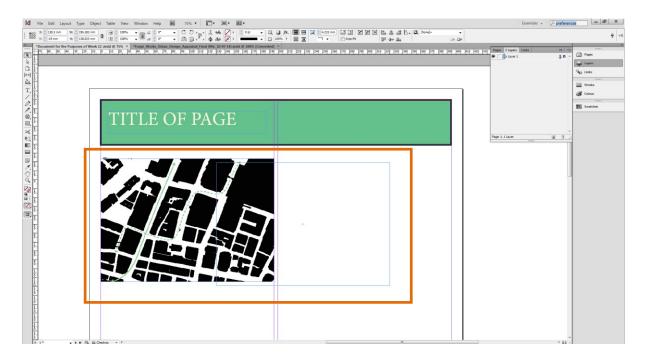


• Your Import will appear as below.

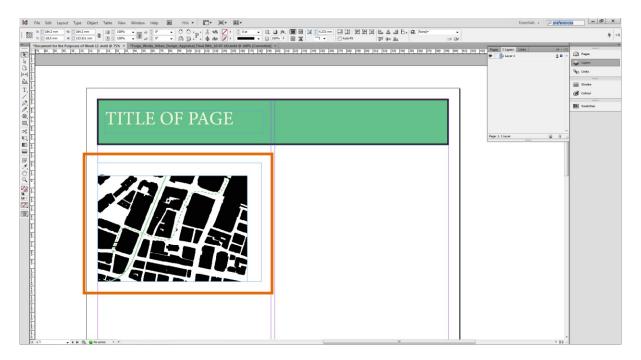


Moving and Resizing Images and Objects

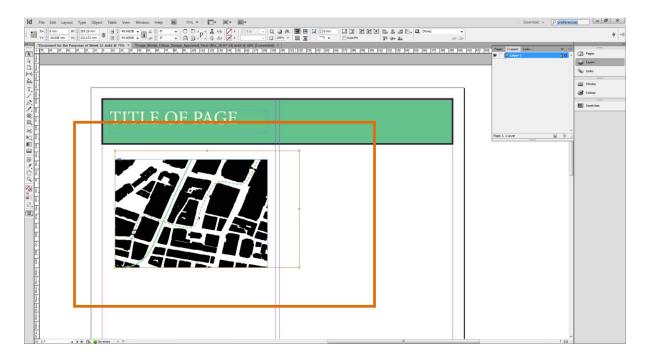
- Select the Selection Tool (V)>click on the Image (the outline of the box will turn Blue). You
 can move this Box by simply dragging it to another area of the document or you can
 transform the shape and size of the box by clicking and dragging one of the corners (same
 as Ai and Ps).
- When moving Objects (Hold Shift). This will maintain the correctshape.



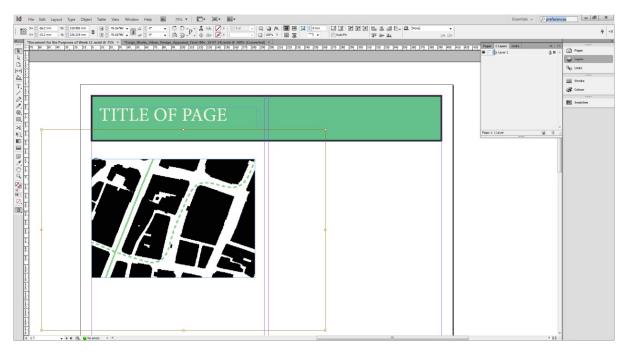
• When Transforming Objects (Hold Shift). This will maintain the correct shape.



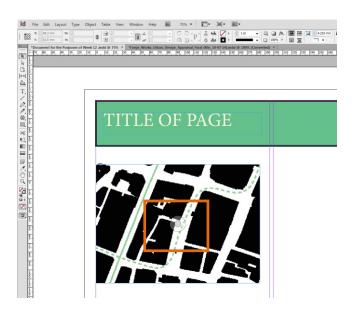
- Alternatively you can also resize any image within its boundary box, allowing you to zooming into/out of the image.
- To do this select Direct Selection Tool (D)>click on the image (the outline of the box will turn orange). The orange boundary box indicates that you have selected the image, not the actual box (see overleaf). Double clicking on any image will also deploy the Orange Boundary Box.

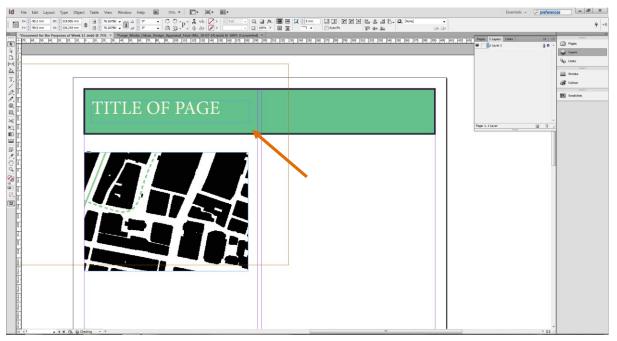


You can move and transform this object/image as above (Hold Shift). By doing so you will
end up with something like this.



- This is a very useful feature in page design.
- Another useful feature is the ability to move the Image/Object around within Boundary
 Box. Select Direct Selection (D)>Click in the centre of the image (or the lense)>Drag to
 move the image around (see overleaf).

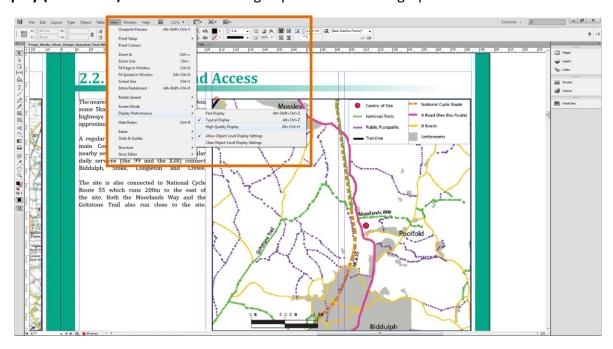




Links Panel

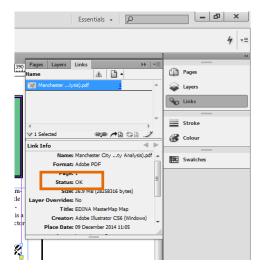
- Unlike Ps or Ai, InDesign uses Links i.e. when you place a map or object InDesign Links to
 where that file is saved on your computer it does not fully copy it*. As a result it will
 display a rough/pixelated image not a fully robust glossy version so as to provide you with
 an indication as to what is contained on that page. It is for this reason that Id can handle
 large files.
- Nonetheless, when you Export your document everything will be clear (we will return to this).

To improve the display of the graphics Click View>Display Performance>High Quality
 Display (Alt+Ctrl+H). You should see a big improvement in the graphics.



^{*}It is extremely important that you keep all of the files you have imported into the Id document together in one single folder.

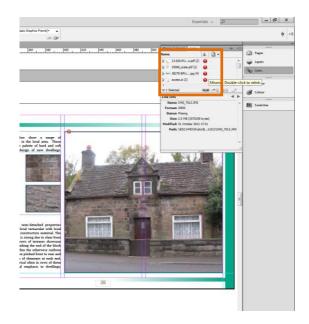
 To check to make sure all of the Imported files are correctly Linked to your InDesign document Click>Window>Links (Shift+Ctrl+D). The Links panel will be displayed:



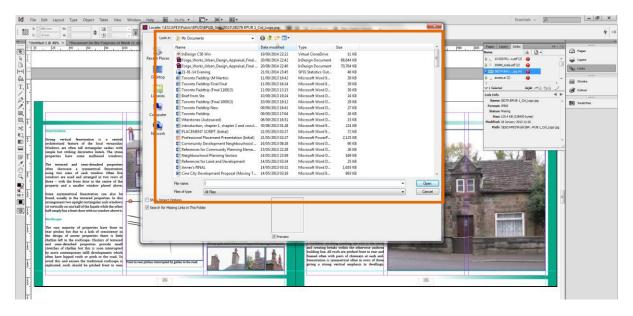
As you can see in this example Status is OK i.e. it is linked.

Re-Linking Files

• Sometimes your **Imports** are not **Linked** correctly:



When this happens you need to Re-Link the Files. To do this Select Selection Tool
 (V)>Double Click on the Broken Link. The Locate Window will appear:

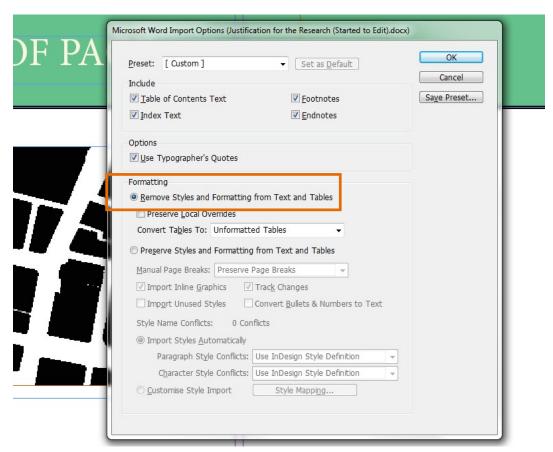


 Manually search for the Original File (which should be easy if you stuck to the advice and kept everything in one folder)>Select it>Click OK. The Link should be successfully restored and its Status will be displayed as OK (as shown in the Links Panel on pg 28).

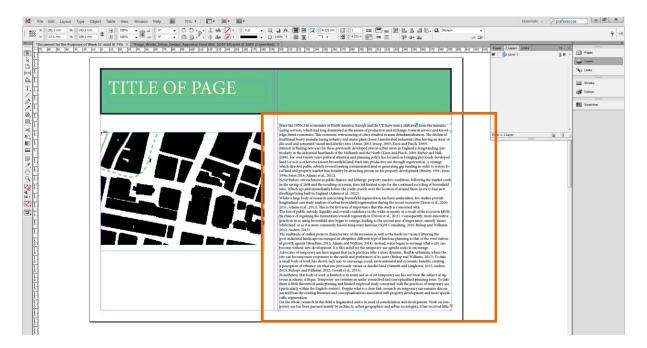
TEXT AND TEXT BOXES

Importing Text

- Whilst InDesign is extremely good at recognising file formats it rarely manages to import a text document, such as a Word doc. without creating formatting issues.
- When importing text into InDesign remove all formatting and manually reformat if yourself in InDesign.
- To do this click File>Place, select your text document and as you did with the
 Image/Object, select Show Import Options an alternative pop up window will appear.



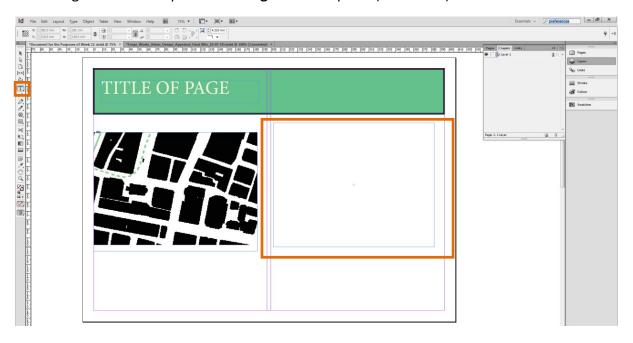
• Select>Remove Styles and Formatting from Text and Tables>OK. As before simply Click and Drag to Place your text. The text will need to be reformatted manually.



- Alternatively, you can Copy and Paste text from a Word doc. into an InDesign
 Text Box>to do so Ctrl+C to copy and Ctrl+V to Paste.
- It is advised that text is created in Word and then Placed on your document>the main reason for this is that Word's Spell Check function is much more robust than InDesign's.

Inserting Text Boxes

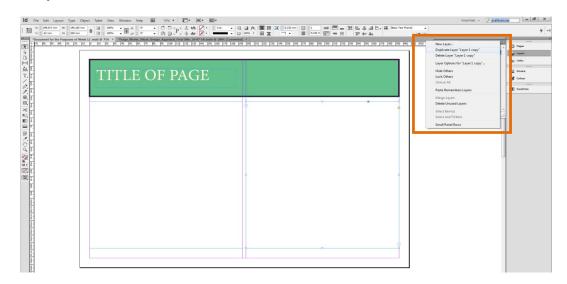
•To insert a **Text Box** simply click **Type Tool (T)**>and as with pretty much anything in InDesign **Click** a start point and **Drag** to an end point (see below).



With the Type Tool (T) selected you can then enter your text. Alternatively, you can
 Copy and Paste text from a Word doc. into an InDesign Text Box>to do so Ctrl+C
 to copy and Ctrl+V to Paste.

Duplicating or Deleting an Object/Image/Text Box etc.

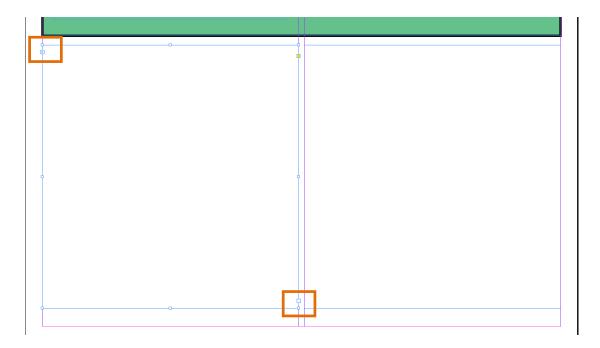
To duplicate any object, image, text box etc. click Selection
 Tool(V)>Layers(F7)>Expand Layer Options>Select Duplicate Layer OR Delete
 Layer.



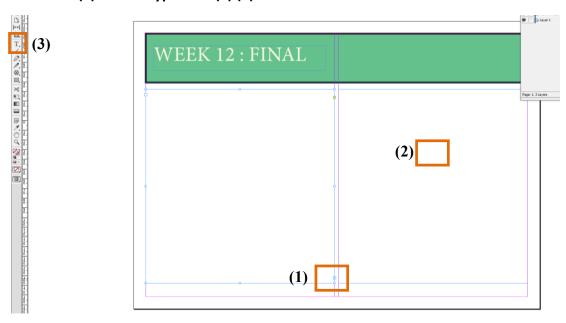
 As with many of the processes contained within this hand-out the InDesign interface is almost identical to Ps and Ai. As you already have a robust knowledge of both of these software programmes you should take to InDesign like a duck to water.

Linking Text Boxes

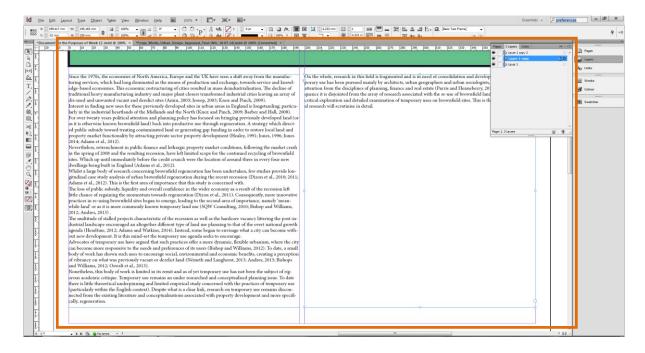
- Rather than having lots of individual text boxes which all require separate
 editing Link your Text Boxes>this will provide you with more control over your
 content and will reduce your workload. You can Link all Text Boxes regardless
 as to whether they have been imported or manually drawn.
- To do this select the Selection Tool (V)>Click on the Text Box>You will see Small Blue Box Symbols in the Top Left and Bottom Right of the Boundary Box (below):



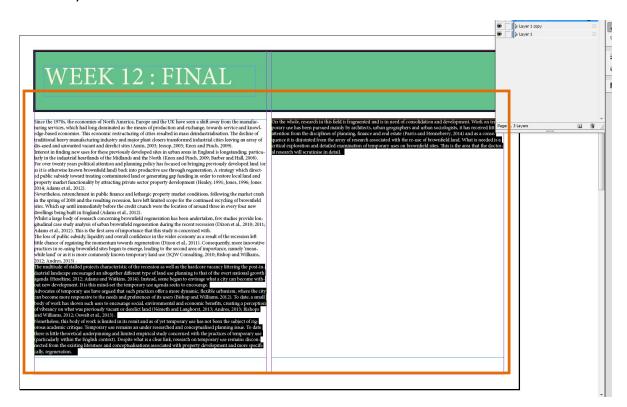
- The Bottom Right symbol represents where you would like to Link FROM whereas
 the symbol in the Top Left represents where you would like to Link TO.
- Click on the Blue Box in the Bottom Right (1) (in this example Text Box on the Left)>now Click inside the Text Box on the right or in the Top Left Symbol to Link them (2)>Select Type Tool (T) (3).



• Copy the Text you wish Copy>Hit Ctrl+V to Paste. Your Screen should look similar to below:

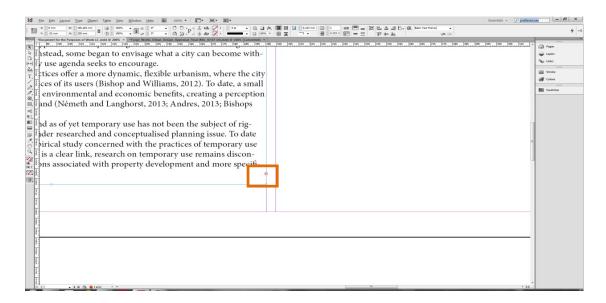


• Now you can edit the contents of both Text Boxes at the same time:



Overset Text

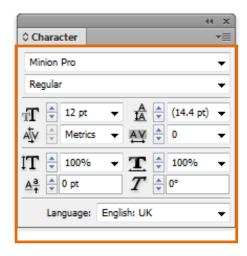
 When dealing with large amounts of text (which you really should not be dealing with for the purposes of your posters/portfolio) it is possible that you will **Overset** your text:



When Text is Overset the Blue Symbol used to Link Text Boxes turns into a Red
 Cross>To solve this problem you should either Resize the text box by
 Transforming it Or Link the box to a new Text Box.

Character Styles

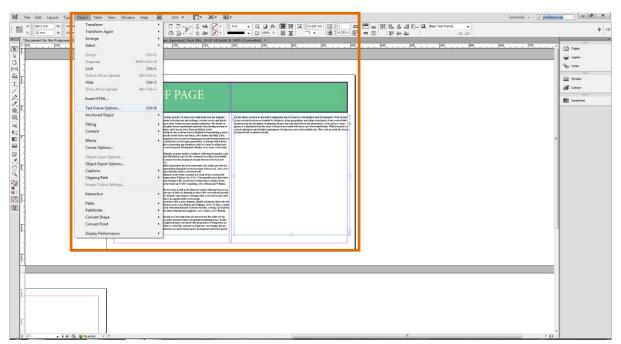
- An important aspect of graphic design is learning how to deal with text correctly it
 can be the difference between a smart, easy to follow document or an illegible
 mess.
- Click Window>Types and Tables>Character, the following window showcases all the tools you will need to make alterations to your text:



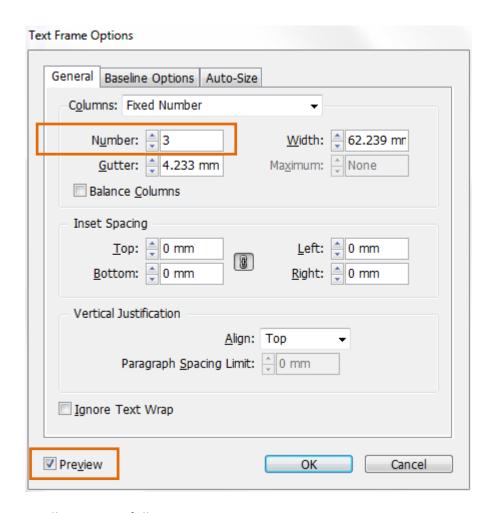
Play around with the various functions to see how they alter your text.

Text Frame Options

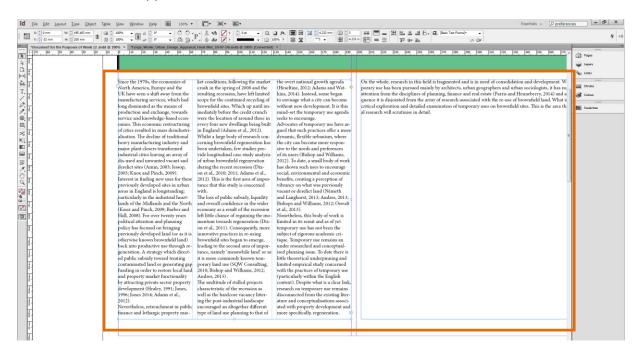
Text Frame Options allows you to apply columns and margins to each individual Text
Box. To do this select the Selection Tool (V)>Click on the Text Box>Select
Object>Text Frame Options (Ctrl+B):



• You will see the following window, here you can edit Columns, Margin, Gutter etc. to suit your needs:



Your Text will appear as follows:



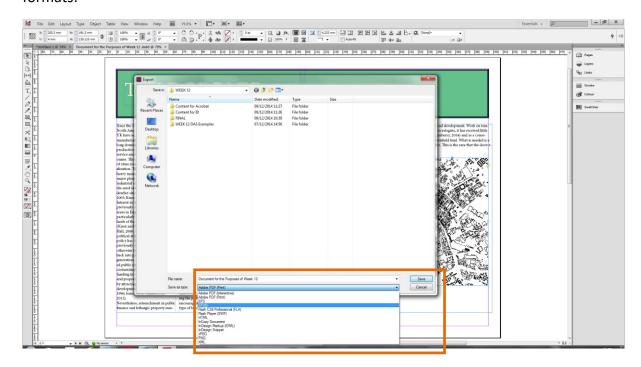
SAVING, EXPORT AND PRINTING IN ID

Saving

- 1. In **Id** you should save your Document in two formats 1) InDesignDocument and 2) Export as a PDF (this is explained below).
- 2. To Save as an InDesign Document Click Ctrl+Shift+S>Select a Save Location>Click OK.
- Save as an InDesign Document when it is still a Working Document. When you are close to completion (or alternatively wish to check Layout etc.) Export as a PDF (below).
- 4. Save and Export each time you finish working on the document>that way you will be checking what has been completed to date (this may reduce your Proofing time at the end).

Export

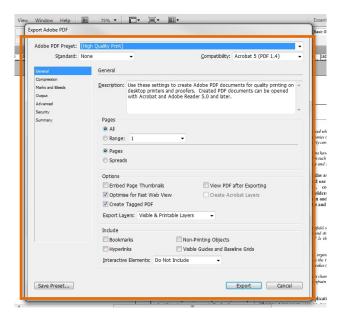
5. In order to Print or Upload (e.g. as part of an online web portfolio) the Id Document you must Export it. Click File>Export (Ctrl+E). From here you will be given a choice of file formats:



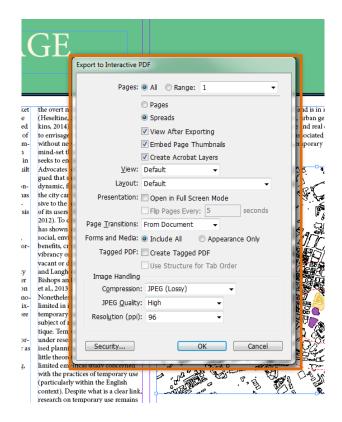
You will almost always choose PDF. Normally for printing you would select PDF (Print)
 but you can also select PDF (Interactive):

PDF Print:

Select the same as below>Click Export. Now Open in Adobe Acrobat for Proofing.



PDF Interactive:



Select the same as above*>Click **OK**. Now Open in **Adobe Acrobat** for Proofing.

*Play around with resolution – if you can go higher than 96 and still be under the Maximum Size for online Submission then do so. Vector Graphics (i.e. those created through Ai or Id) will not be effected by this, the point of increasing the resolution is to improve the quality of your Bitmap Graphics/Images (i.e. Ps or JPEG files) contained within the document¹.

Printing

Open your Exported PDF (in Adobe Reader/Acrobat)>Ctrl+P>Check Settings>Click
 OK to Print².

Essential Note:

In order to keep your file small, do NOT link to Ai files. Link to JPEG to make the file lighter.

-

¹ **Vector Graphics** can be resized, shrunk, warped, stretched and altered in almost any way and they will not reduce their image quality. This is because they are not made of Pixels. **Bitmap Graphics** are made up entirely of pixels and therefore adhere to rules of resolution. By increasing/decreasing the Resolution (Pixels Per Inch PPI) you effect the quality of the graphic.

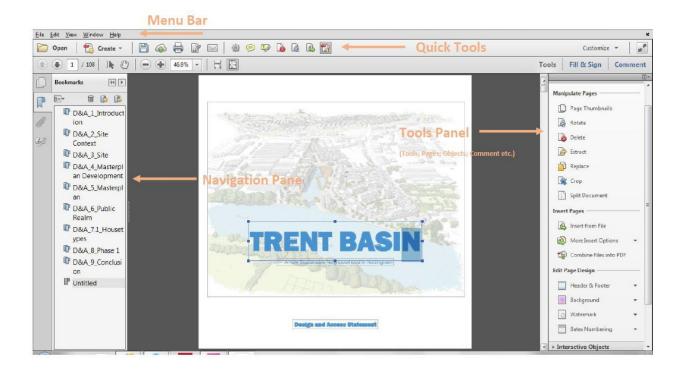
² When laying out your pages it is more than likely you will have changed the scale of the maps. If your maps were 1:2500 at A2, it is recommended you include 1:2500 @ A2 on your pages alongside the maps as this is the original scale.

INTRODUCTION TO ADOBE ACROBAT

Adobe Acrobat is an application software and web service used to view, create, manipulate, print and manage files in Portable Document Format (PDF). Adobe Acrobat is the perfect application for proofing your document, it can handle large files without crashing and permits the user to edit text, switch or replace pages, reduce the file size (typically for sending via Email) as well as create online web portfolios.

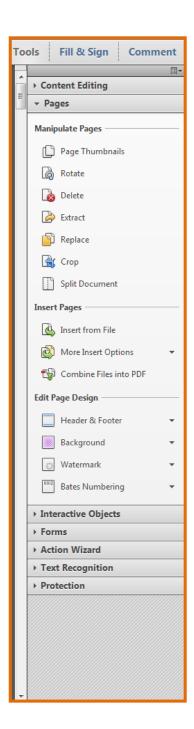
Acrobat unlike other Adobe software (Ps, Ai or Id) is user friendly with a simple and straightforward interface.

Adobe Acrobat Interface



Adobe Acrobat Tools

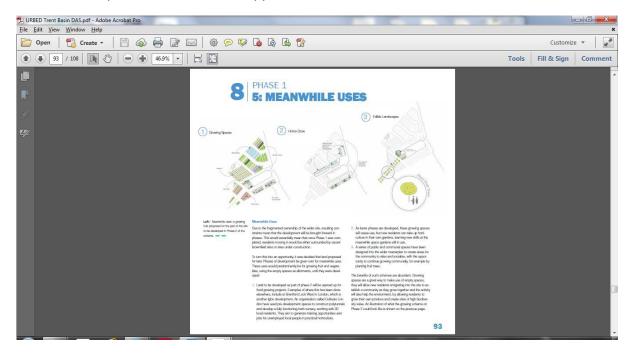
 Acrobat unlike other Adobe Software does not feature a toolbox, but rather a series of Options. All of these options are self-explanatory such as: content editing; pages; interactive objects; forms; text recognition.



CONTENT EDITING

Open a New Document

- Acrobat unlike other Adobe Software does not feature a toolbox, but rather a series of
 Options. All of these options are self-explanatory such as: content editing; pages;
 interactive objects; forms; text recognition.
- Launch Acrobat, when it opens click **Ctrl+O**. Locate the file you wish to work on and click Open. Your screen will appear as below:

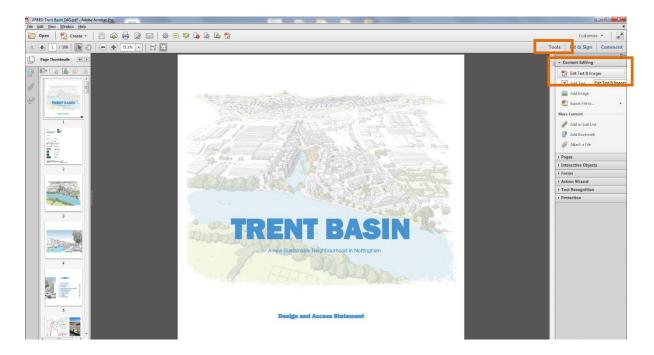


Undo/Redo and Zoom In/Out

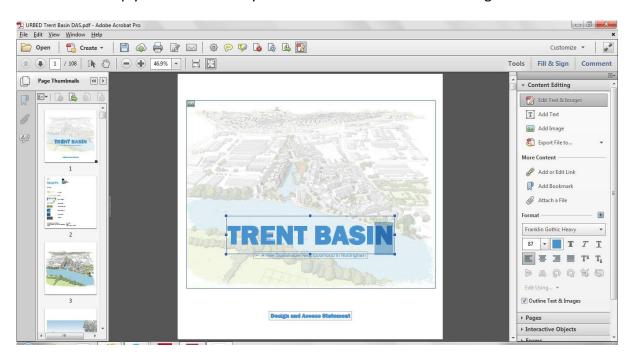
- Use Crtl+Z for Undo and Shift+Ctrl+Z for Redo.
- Click Ctrl+ for Zoom In and Ctrl- for Zoom Out.

Editing Text

• Click Tools>Content Editing>Edit Text and Images*.



• Now simply click on the text you want to edit and make the change:

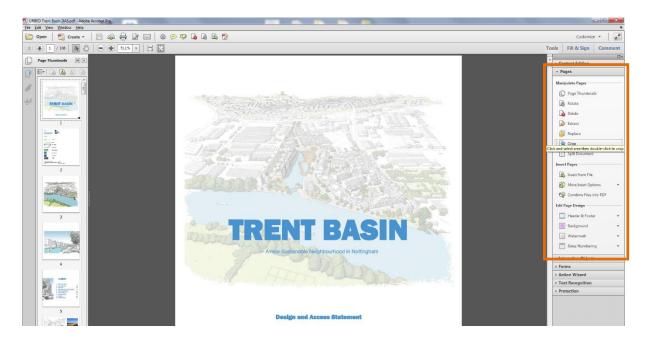


*For those who are using Acrobat (Version 7 - 9). Click Tools>Advanced

PAGES

Insert/Delete/Extract/Replace Pages

Click Tools>Pages>Select Insert/Delete/Extract/Replace Pages etc*.



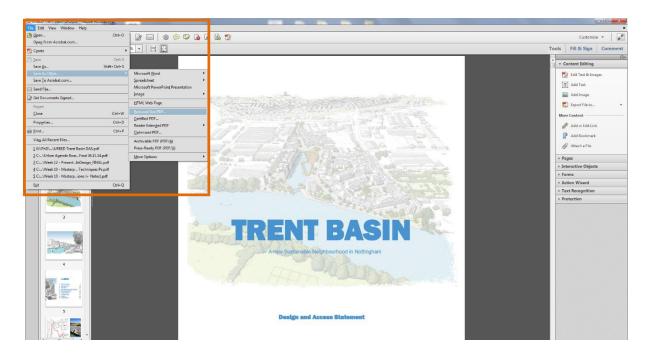
You will be presented with a new window, enter what it is you want Acrobat to do then click OK.

*For those who are using **Acrobat (Version 7 – 9)**. Click **Document>Select Insert/Delete/Extract/Replace Pages**. This will allow you to do exactly the same as above.

SAVE AS REDUCED FILE SIZE

Reducing File Size

- Click Tools>Content Editing>Edit Text and Images*.
- Click File>Save As Other>Reduced Size PDF*.

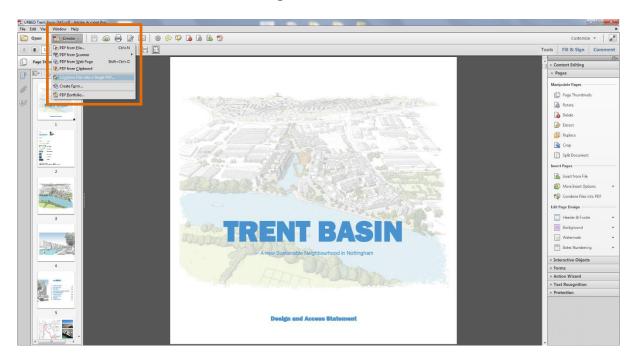


*For those who are using **Acrobat (Version 7 – 9)**. Click **File>Reduce File Size**. This will allow you to do exactly the same as above.

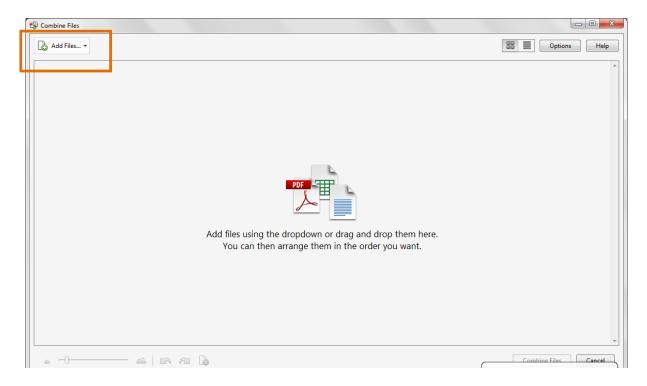
COMBINE FILES INTO A SINGLE PDF

Combining PDF Files

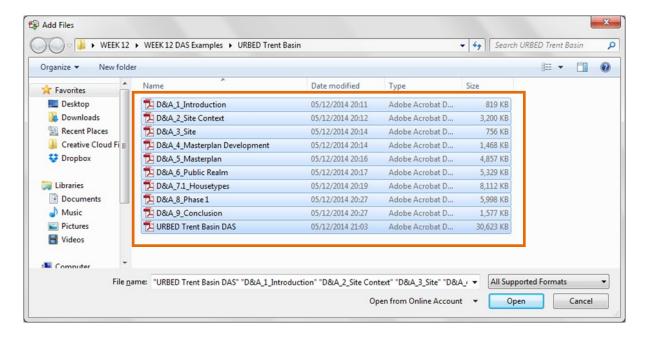
• Click Create>Combine Files into a Single PDF*.



• You will be presented with a pop-up window. Click Add Files.



• **Select** the files you wish to **Combine>Click Open**.



• You have now created a Single/Merged PDF.

*For those who are using Acrobat (Version 7 – 9). Click Create PDF>From Multiple Files>Browse>Select the files you want to Combine>OK. This will allow you to do exactly the same as above.

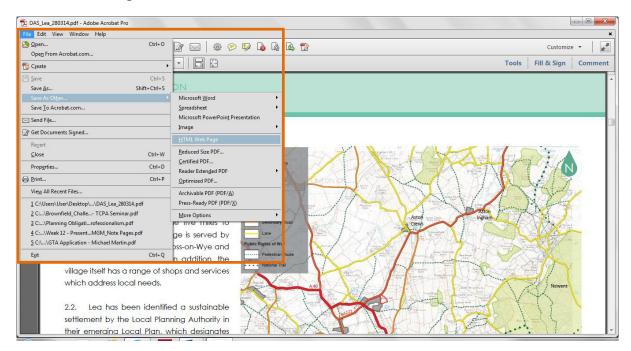
SAVING AND PRINTING

Saving as a PDF

To Save as a PDF Click Ctrl+Shift+S>Select a Save Location>Click OK.

Creating a PDF Web Portfolio

To create a **PDF Web Portfolio** (fantastic for CV, Job Applications etc.)>**Click File>Save as Other>HTML Web Page**.



- Create A New Folder in the Save Location>Click Save.
- You have now created a Web Page to showcase your Portfolio. For further information about Publishing and Sharing PDF Portfolios please see the following link: http://helpx.adobe.com/acrobat/using/publish-share-pdf-portfolios.html.

Printing

To **Print** your **PDF>Ctrl+P>Check Settings>**Click **OK** to Print.

FURTHER INFORMATION

Adobe InDesign CS6 Tools/Options

1. InDesign Help_

http://helpx.adobe.com/indesign/topics.ht ml Official Adobe InDesign Help.

2. InDesign Tutorials_

https://helpx.adobe.com/indesign/tutorials.ht ml Official Adobe Id Tutorials.

3. InDesign YouTube Channel_

https://www.youtube.com/channel/UCFZOtakYohPkTvwtFu7 U2g YouTube Channel Dedicated to InDesign.

Adobe Acrobat Pro XI Tools/Options

1. Adobe Pro XI Help_

http://helpx.adobe.com/acrobat/topics.ht
ml Official Adobe Acrobat Help

2. Adobe Pro XI YouTube Channel_

https://www.youtube.com/user/acrobat

Official Adobe Acrobat YouTube Channel