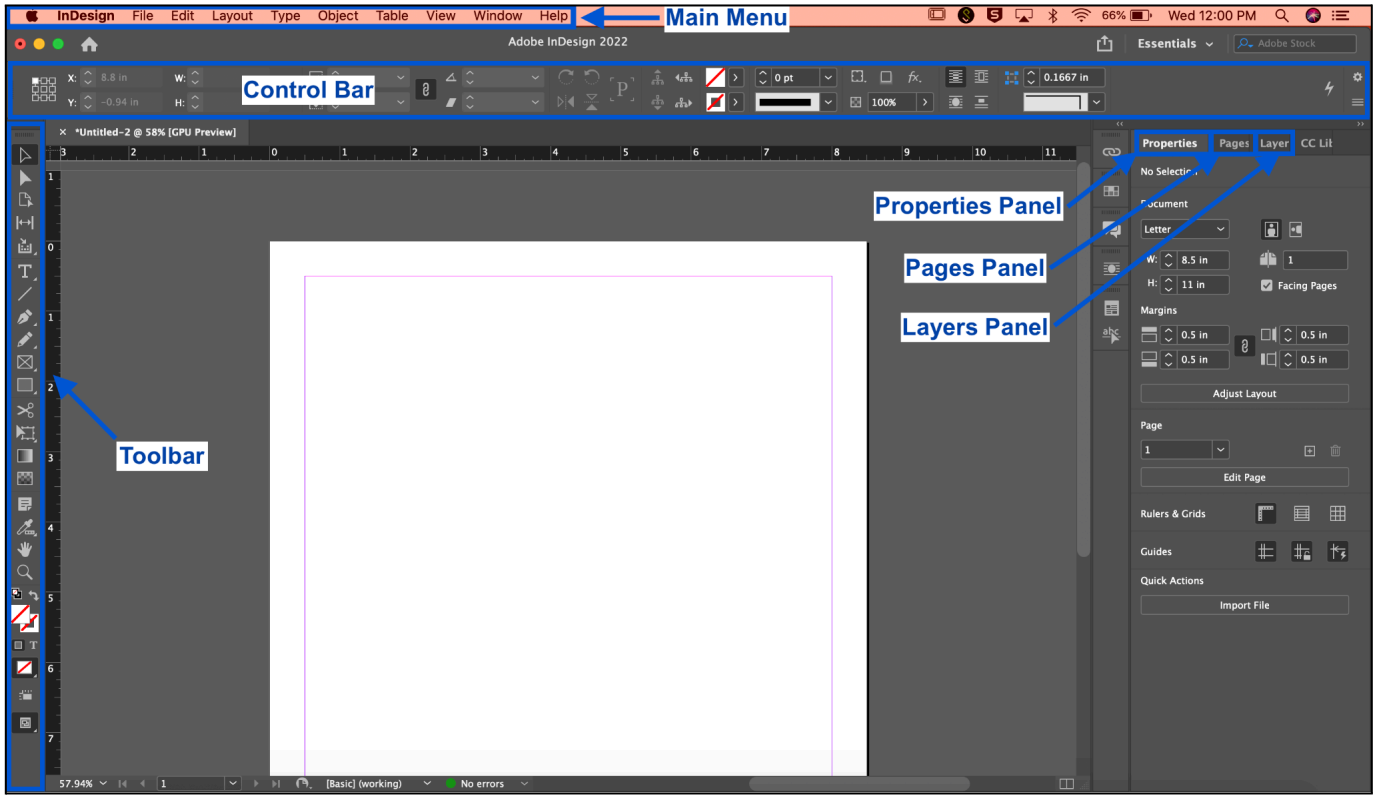
Welcome to InDesign!

★ **Please make sure you have a hard drive/flash drive/place to store all of your project files! It is critical to the success of your InDesign experience.**

☐ **Overview of InDesign**:



☐ **The Window button in the main menu at the top of your screen (a.k.a. your best friend):**

- This interface layout (as shown above) is called **Essentials**, and if you ever need to reset back to this, go to **Window** → **Workspace** → choose **[Essentials]**.
- If you can't find a panel (**Properties**, **Pages**, and **Layers** for example), go to **Window** → and browse the **dropdown list** until you find what you need. Once you **open that panel**, you can **drag the window** to the tabs in the upper right-corner to place it there.
- Go to **Window** → make sure that **Control** is checked on ✓ to make sure the **Control Bar** at the top is visible. This bar will update with different options depending on what tool is currently selected.

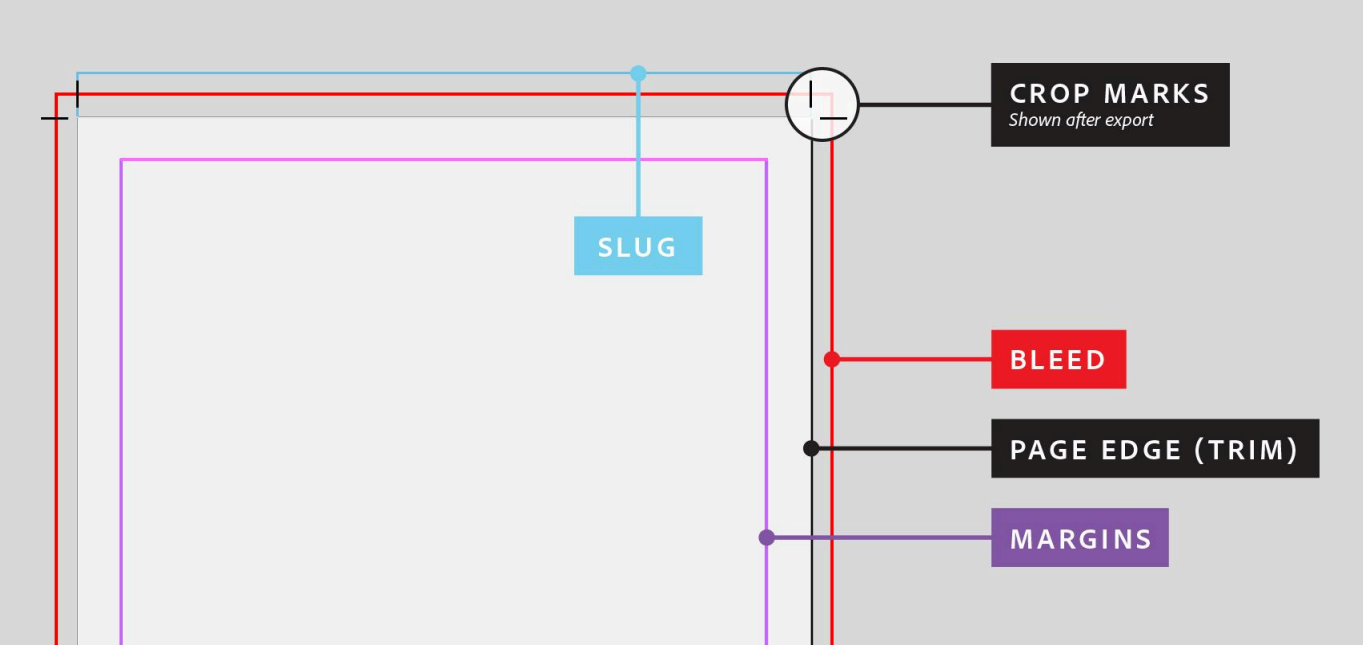
☐ **Screen Modes**:

- In terms of the way the screen shows up, you will also want to toggle between what InDesign calls **Normal**, **Preview**, **Bleed**, **Slug**, and **Presentation**. You can do so with the **Screen Mode** button at the bottom on the **Toolbar** .

Normal → editing or working mode, with guides and margin lines visible.
Preview → printed area only, without guides**.**
Bleed → preview mode but with bleed area included.
Slug → preview mode but with bleed and slug area included.
Presentation → full preview mode for presenting.

- You can also switch between screen modes by going to **View** at the top of the screen → **Screen Mode**.

☐ **What is Bleed and Slug, you ask:**



Bleed → the printing that goes beyond the edge of where the paper will be cut to size. Therefore, **bleed** is the area that will be trimmed off, but images should be extended through the **bleed area** to avoid a white line of paper at the trim line when the project is printed.

Slug → is just extra space around the edge of the document, beyond even the **bleed area**, that will be trimmed off as well in the final product. This space is used to add any additional information for printing purposes, including display instructions, color bars, and other descriptions.

☐ **Using Rulers, Guides, and Grids to align your content:**

- First step is to check that you are in **Normal** screen mode by going to **View** in the main menu → and choosing **Screen Mode** to toggle between view types as you are working. **Normal** mode will allow you to see all of your document's guides and grids, while anything else will hide them.

- You'll also want to make sure the rulers are visible by going to the top of the screen and choosing **View** → **Show Rulers**.
- To create a grid, go to **Layout** → **Create Guides** and input the number of rows and columns to build a reference grid.
- To hide/show these guides, go to **View** → choose **Grids & Guides** → select either **Hide Guides** or **Show Guides**.
- You can also add custom guides by clicking and dragging over from the rulers at the top and left of the interface.

☐ **Zoom in/out and position page in the workspace:**

- Use the keyboard shortcuts **command/ctrl +** "**+**" or " **-**" to zoom in/out of the page.
- In the **Toolbar**, you can use the hand tool  to slide and reposition the pages.
- To fit the page to the screen, use **command/ctrl + 0**.
- To fit the spread to the screen, use **option** + **command/ctrl + 0**.

☐ **The Toolbar and the Properties, Pages, and Layers panels:**

- The most important tool is the **Selection** tool, which looks like an average cursor . This will be the primary tool for moving around elements on the page. To return to this tool if you have any other selected, use the keyboard shortcut **V**.
- Note that the **Selection** tool selects objects as a whole so that you can manipulate that entire object, and is different from the **Direct Selection** tool  underneath it, which selects the individual points of an object.
- The **Layers** panel will show you all of the layers stacked on the page you are currently working on. You can unlock, hide, and rearrange the order of content as it is stacked on a page. Selecting an item on the page and hitting **command/ctrl +** [or] will stack an object layer backwards or forwards.
- The **Properties** panel will allow you to change the **style**, **alignment**, and **color** of your text when you have the **Text tool** active (the **Control Bar** will also show you the same controls).
- When you have the **Text** tool active, click and drag to create a new text box on your page. Often you will have to return to the **Selection** tool after using the **Text** tool → instead of using the shortcut **V**, use the **escape** key instead**.**
- The **Pages** panel will allow you to overview your document and all of the pages it contains.

☐ **Using guidelines and grids to align your content:**

- First step is to check that you are in **Normal** screen mode by going to **View** in the main menu → and choosing **Screen Mode** to toggle between view types as you are working. **Normal** mode will allow you to see all of your document's guides and grids, while anything else will hide them.

- To create a grid, go to **Layout** → **Create Guides** and input the number of rows and columns to build a reference grid.

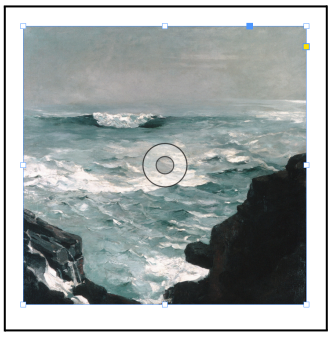
- To hide/show these guides, go to **View** → choose **Grids & Guides** → select either **Hide Guides** or **Show Guides**.

- You can also add custom guides by clicking and dragging over from the rulers at the top and left of the interface.

☐ **Placing and resizing images:**

- Drag and drop an image from your folder into your InDesign document. You should see a **loaded cursor** with a mini version of that image attached to it. You can click anywhere to **place** that image within the page.

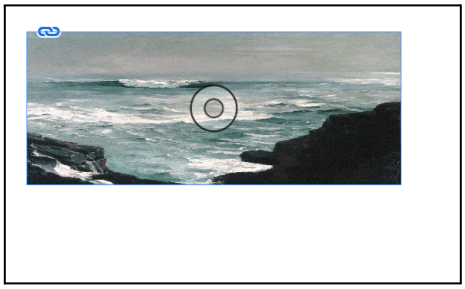
- Now, If you try to resize this image by dragging the bounding box (shown in blue) smaller or wider, you'll notice it starts cropping the image. That's because you are actually changing the size of the **frame** around the image, not the image itself. **Command/ctrl + z** to undo.




- If you **double-click** on the image, you'll see the bounding box turn yellow. Now, the image inside the frame is actually selected, so if you drag the bounding box smaller it will resize the image itself, but not the frame around it.




- **Double-click** on the image again to make sure the frame is selected (blue bounding box). Then, hold down **command/ctrl** and drag the corner of the bounding box to resize the image *and* the frame around it at the same time. Note that doing so does not constrain the proportions of the image, so we end up skewing the final result.



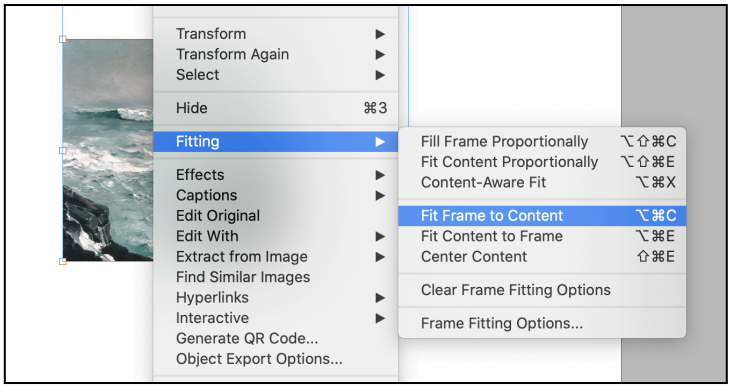
- To avoid the skew, with the frame selected (blue bounding box), hold down **shift + command/ctrl** and drag the corner of the bounding box to proportionally resize the image *and* the frame around it at the same time.

- You can also resize an image and its frame by **ctrl + click (right-clicking)** on it and selecting **Transform → Scale...** and changing the percentage value. I usually do this as a first step for really large images as I first place them in the spread.

☐ **Creating an image frame:**

- Before you have placed an image, you can pre-place and size a **frame** for a future image by using the **Frame** tool  in the **Toolbar**. Select the tool, then **click + drag** to draw the frame within the spread.

- When you drag in an image, with your cursor loaded you can click into the pre-drawn frame to place it within. You will still need to resize and position the image inside the frame, as before, or by **ctrl + click (right-clicking)** on the image and choosing from the **Fitting** menu.



- You can also nudge an image's position while the frame is selected (blue bounding box) by clicking and dragging the **circle** that appears in the center of the frame.

☐ **Important notes on using images in InDesign:**

- **If you place an image such that it touches the edge of that page, expand that image all the way ⅛ in past the edge of the page to the bleed line.** Doing so ensures that no white border will be left along the image's edge when the final print product is trimmed.
- **Make sure that you store your image along with the rest of your project files, because if you move it, InDesign will produce an error.**

☐ **Extras and effects:**

- **Ctrl + click (right-click)** on the image → select **Extract from Image** → **Shapes**.
- There are also effects you can apply to any object on screen by **ctrl + click (right-click)** and choosing **Effects.** From there, you can select an effect and adjust its settings. Preview the application of the effect by checking the 

option in the lower left corner of the window .

☐ **Adding text:**

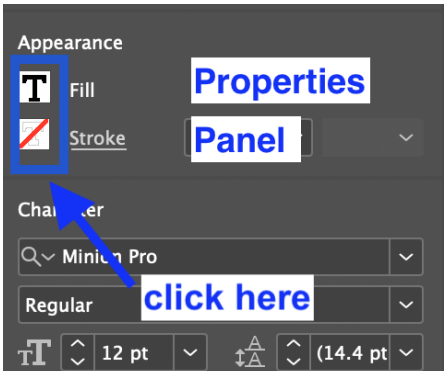
- Use the **Type** tool  in the **Toolbar** to click + drag to draw a text box. **Double-click** inside of a text box when the **Type** tool is not actively selected to switch to it, and hit **esc** to get out of it.
- Change the properties of your type in either the **Properties Panel** to the left or the **Control Bar** at the top of the screen.
- **Ctrl + click (right-click)** on a text box to select **Fill with Placeholder Text** to use a lorem ipsum type of copy to illustrate the idea of text (or use a site like loremipsum.io to generate the same kind of filler and copy/paste).
- Text boxes can be resized with the bounding lines on the edge of the box, in the same way as images. You can therefore also **ctrl + click (right-click)** on a selected text box and use the **Transform** options or the **Fitting** option as well.

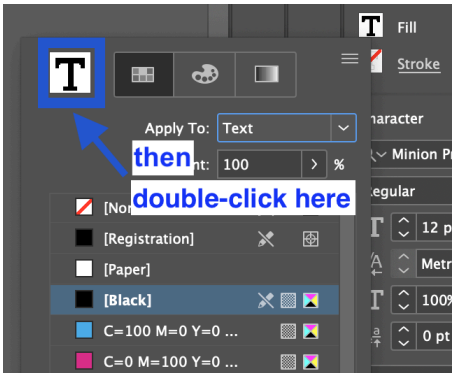
☐ **Changing text fill and stroke color:**

- Changing the color of your text can be done in either the **Control Bar** or the **Properties** panel. In the **Control Bar, double-click** on the box next to **fill** or **stroke**. From here you can select a color swatch or input the **6-digit hex code** for the color you would like to use.



- In the **Properties** panel, there is an extra step. **Click first** on the box next to **fill** or **stroke**, then **double-click** on the second box in the upper left corner of the pop-up menu. Then you can similarly choose the color swatch or input a hex code.





- You can also use the **eyedropper** tool that appears in the **Color Space View** by clicking and dragging it towards a specific color on the page to copy.

☐ **Type on a path and draw shapes:**

- You can use the **Shape** tool in the **Toolbar** to draw rectangles, ellipses, and circles . To view the other options, **ctrl + click (right-click)** or **click + hold** on the tool and select between shapes. You can either draw it out, or **click once** to start with a prescribed size for your shape.

- To type into a shape you've created, choose the **Type** tool and click on the shape, thereby converting it into an editable text box.

- You can use the **Path** tool in the **Toolbar** to draw a custom line made up of anchor points. You can **click** with the **Path** tool to add an **anchor point**, and **option + click** to curve the line at that individual point.

- Once your path is drawn, **ctrl + click (right-click)** or **click + hold** on the **Type** tool to choose the **Type on a Path** tool in the **Toolbar**. With this chosen, hover over the path you've drawn until a little **+** pops up next to the **Type on a Path** cursor. **Clicking** on the path will now turn it into an editable text field.

- To change any of the properties of **Shapes** or **Paths**, including the color of the **Fill** (interior) and **Stroke** (outline) or the width of the **Stroke**, with the object selected, go to the **Properties Panel** to the left or the **Control Bar** at the top of the screen.