

Moving to InDesign: Tips and Techniques from the (Design) Trenches

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Setting Up Your Document

- **Save Doc Presets:** Use the button in the New Document dialog. To view them in alpha order, hold down Command-Shift-Option/Ctrl-Shift-Alt and choose File->Document Presets
- **Margins, Columns and Ruler guides:** To change margins/columns for entire document, use Layout->Margins and Columns on Master Page/Spread, otherwise it just affects current doc page. Ruler guides are items that can be selected, moved, deleted, aligned, stepped and repeated, sent to a layer, and more.

Keyboard tricks: Hold down Shift key as you drag to snap a ruler guide to ruler tick mark. Hold down Command/Ctrl to drag out spread guides when Pasteboard isn't showing. Clear Guides: Command-Option-G/Ctrl-Alt-G to select all guides, press Delete.

Add pages: File->Document Setup; Pages palette menu->Insert Pages; or Option/Alt-click on New Page icon

Text and Type

- **For finest typography:** Paragraph Composer (on by default); Change default kerning to Optical (Character Palette); Change default margin alignment to Optical (Story Palette)
- **Autoflowing text:** Starting with loaded text cursor—Shift-click is full autoflow (fills pages with frames of text, adding new pages if necessary); Option/Alt-click is semiflow (creates/fills one text frame and loads the cursor for next), Shift-Option/Shift-Alt-click is demiflow (fills existing pages, doesn't add any new pages)
- **Copyediting to fit:** Use the Story Editor and keep an eye on the Info palette for + signs to disappear (meaning it fits, no overset)
- **Style sheets:** Character style sheets can be just one formatting command (e.g., a color). Both char and para styles can be redefined to match locally-formatted permutation. Use Nested Styles (option in Paragraph Style dialog) to embed Character Styles that follow a pattern (e.g., bullets in bulleted list).

Color

- **Use Eyedropper:** Click w/Eyedropper on placed image to pick up a color from that. Hold down Option/Alt to “unload” dropper and click on another color.
- **Swatches vs. Color palette:** Swatch colors are linked to object color, “unnamed” colors from Color palette are not. (Choose Add Unnamed Colors from Swatch palette menu to convert them to Swatches.)
- **Pantone libraries:** Swatch palette menu->New Color Swatch, choose library from Color Mode dropdown menu.

Placing Images

- **Use Native Format:** Photoshop .psd or .pdf, Illustrator .ai. Faster and ID supports their transparency.
- **Importing:** In addition to Place command, can drag/drop from Finder/Explorer or Photoshop browser
- **Screen Display:** Change display performance to High Quality via Prefs or Object menu
- **Resize:** Command-Shift/Ctrl-Shift-drag on corner, or size frame normally and use Object->Fitting commands

Transparency

- **InDesign transparency:** Opacity and Blend Mode (Transparency palette), Drop Shadow and Feather (Object menu); works on images and type
- **Alpha channels:** To wrap to an image's alpha channel (e.g. a layer mask), Text Wrap palette->Wrap to Object Shape, choose Alpha Channel from Contour Options
- **Production Tip:** Keep vector type and strokes above transparent items to minimize problems

Previewing and Packaging

- **Preview:** Bottom-right tool, or W is the keyboard shortcut. Can preview bleeds and slugs too.
- **Packaging:** ID's “Collect for Output:” File->Package. Collects fonts too.

Resources

Online ID forum at adobe.com/support/forums/
Blueworld's ID listserv: blueworld.com/blueworld/lists/
Local ID user groups: indesignusergroup.com