

10 InDesign Tips for the Occasional User

Adobe InDesign is the most popular professional page layout program in the world. Many non-designers are now expected to produce great documents using InDesign. I've been impressed by the quality of what our clients have created, but I can tell that the user could have gotten better results with less effort if they just knew about these 10 tips. You may know some, but probably not all.

1. Use Paragraph Styles

I've seen some pretty sophisticated documents where no styles were used. The document creator simply highlighted some text and then chose the font, size, weight, color, etc. manually. They repeat this process over and over throughout the document. Using paragraph styles would have saved them lots of time and would make modifications easy. And, making a paragraph style is simple.

First, change everything manually until it's just the way you want it. Then open the Paragraph Styles box (*Window > Styles > Paragraph Styles*). Click on the four horizontal lines in the upper-left of the box and choose "New Paragraph Style." Name your paragraph.

Now, every time you want a paragraph with all those attributes, just choose it from the Paragraph Styles box. And, if you want to make a change, you only have to edit the style and all occurrences will change. Ever had a document that has to fit on, say, two pages and you've run over by 5 lines? Just by editing your paragraph styles, you can make it fit.

2. Why Use "Based on None"

When you create a new paragraph the way I described above, the default "Based On" will be the paragraph you modified to make the new one. If you leave it that way, any change you make to the "Based On" paragraph style will be reflected in any other style which is based on it. For example, if you change the font in the "based on" style, any style based on it will have its font changed, as well. That's why most professionals change the based-on to "No Paragraph Style" unless they intentionally want the styles to change together.

3. Optical, not Metrics, for Kerning

Do you want your intercharacter spacing to look its best? Choose "Optical" rather than "Metrics" in your kerning option. Of course, the best place is to do this in your paragraph style. It's in "Basic Character Formats." Go down to "Kerning" and choose "Optical." Believe me, your type will look better.

4. Optical Alignment

We used to call it "hanging punctuation." And, that's a better description of what it does. Enabling this feature causes periods, commas, hyphens and other punctuation marks to move outside the left and right margins giving those margins a more squared-off appearance. It's particularly useful with fully-justified text and narrow columns. It never hurts to enable this. Go to the top bar and choose *Type > Story* and check the box next to "Optical Margin Alignment."



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5. How to make a font bolder when you don't have a bolder font

Sometimes you need an extra-bold font and you've chosen a font that doesn't have one. Highlight the characters you want to make bolder. Under "Windows" choose "Stroke." The very first item is "Weight." Choose .25 or .5 or enter any number you like until the characters are the level of boldness you desire. If the level of boldness causes the characters to bunch up too much, go to the box right under "Optical/Metrics" and with the newly emboldened letters highlighted increase the interletter spacing by raising that number until it looks right to you. If you're going to need to use this frequently, you can make it a paragraph style or a character style, whichever is appropriate.

6. Hyphenation?

With justified text, you'll probably want to leave automatic hyphenation on. However, with ragged-right text, you may want to turn it off to get a better looking "rag." If your text has a lot of very long words, you may wish to leave hyphenation on, but change the settings in your paragraph style. You do have a paragraph style, don't you? Anyway, edit the paragraph style. Go down to hyphenation and increase the minimum number of letters the word must have to be hyphenated to say, 10. You can also change the minimum number of letters before or after where hyphen can be inserted. Try it until you see what you like. Another benefit of styles.

7. Toggling between Normal and Preview

This setting is located at the very bottom of the icons on the left side. Most of the time you'll be working in the Normal page view mode. This view shows your page outline, text blocks and bleed areas, etc. But if you have images that bleed or you just want to see what the page will look like in the finished document, then you want to turn on Preview. This will show you the page as it will print after being trimmed. You may realize that a part of an image is going to be lopped off. You can fix that.

8. Display Performance

The default setting in InDesign for how your video display will present documents to you is "Typical Display." Frankly, this is a holdover from days when computers had limited graphic display capability. Most new computers can handle the "High Quality Display" setting. In "Typical" images, placed PDFs and other graphics will display pixelated. Change the setting to "High Quality" and everything will look great. You'll find this under *View > Display Performance*. Choose "High Quality Display." If your computer can't handle that you can always toggle between the two.

9. Scaling Images

So, you want to place an image in your document. There are two ways. The easiest way is to just drag the file onto your InDesign page. The second way is to click your way to it: *File > Place > select the file*. The image will open in its own frame, ready for scaling and positioning.

Position the image against the place it needs to be before you do any scaling. For example, if you want the image to bleed off the upper left-hand corner, place it there against the bleed lines. Then using the same selection tool, go to the little tic-tac-toe box in the upper left of the toolbar and click on the box in the upper-left corner. That will lock your image to that corner.



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Now, using the scaling percentage tool located in the toolbar next to “X, Y, W, H” settings, change the percentage until the size looks right. There are other ways to do this, but this is my preference. If you want it to lock into another position, choose another tic-tac-toe box. If you are not sure where it’s going to end up, then scale it first. You can always adjust the size to make it fit your needs.

10. Creating a PDF we can print

It’s critical that we get the highest quality PDF if we’re going to print the highest quality document for you. So, when you create the PDF file there are a few settings you must get right. To create the PDF, go to *File > Export > Save as PDF*.

In the General tab, under “PDF Preset” choose “Highest Quality Print”; Pages=All; Export as “Pages”; check “View PDF after Exporting”. This last one makes sure you see what you’re about to send us. All the other default settings on this tab should be OK

You shouldn’t have to change anything under “Compression.”

Under “Marks & Bleeds,” choose, at least, “Crop Marks” in the “Marks” section. In the “Bleeds” section, regardless of what bleed setting you may have in your document, set your own here. One-eighth to one-quarter inch works for us.

Under “Advanced” set the “Subset fonts when percent of characters used is less than;” to 0. That way the entire font set will be embedded in the PDF. This can be useful if we have to edit your PDF without going back to the InDesign file.

Nothing else should be required. Just click on “Export” and view your PDF. Does it appear as you expected? Are the crop marks and bleeds there? Do the images look right? Just in case, we suggest you print out your document—even on a black & white printer just to be sure your images are crisp and sharp. Images may look great on your monitor but may print poorly.

Happy with what you see? If so, upload your files at www.copygeneral.com.

Final Note

There are many ways to accomplish things with InDesign. This is one person’s way of doing it. If something isn’t clear or you need more information, please feel free to contact our pre-press department.