# Table of Contents

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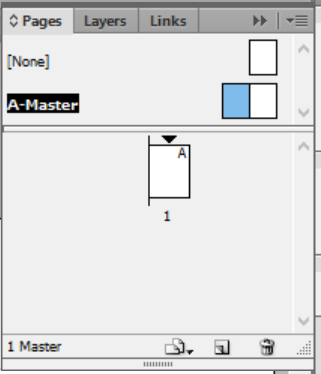
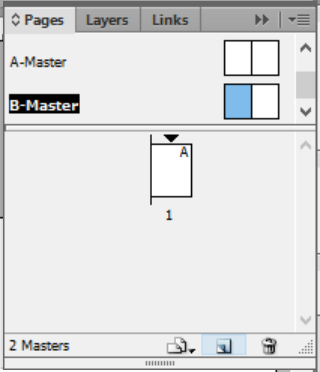
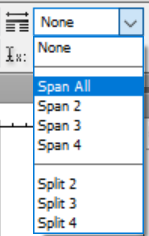
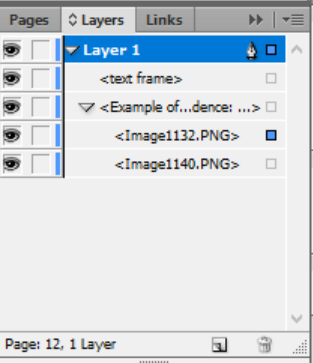
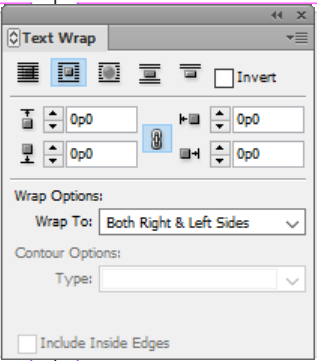
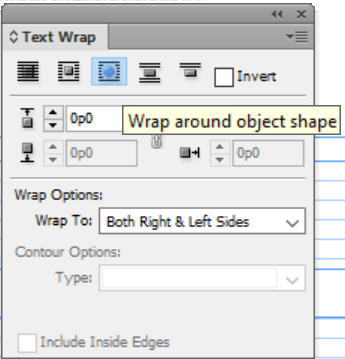
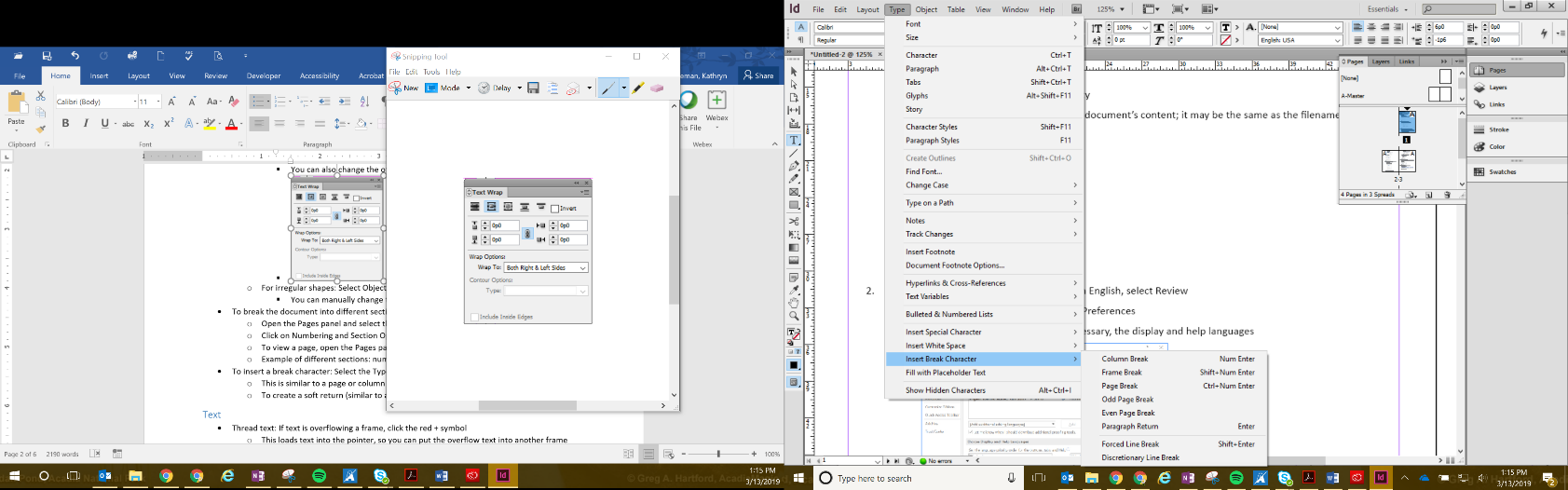
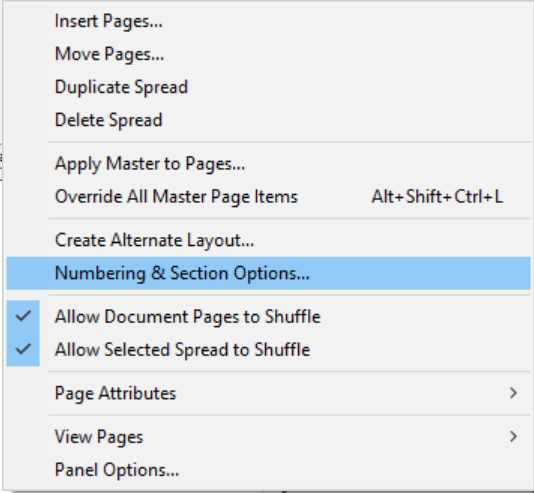
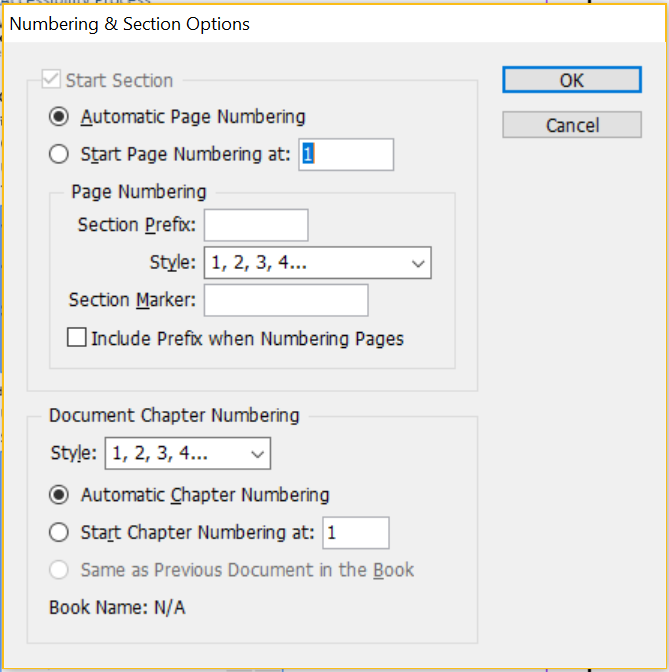
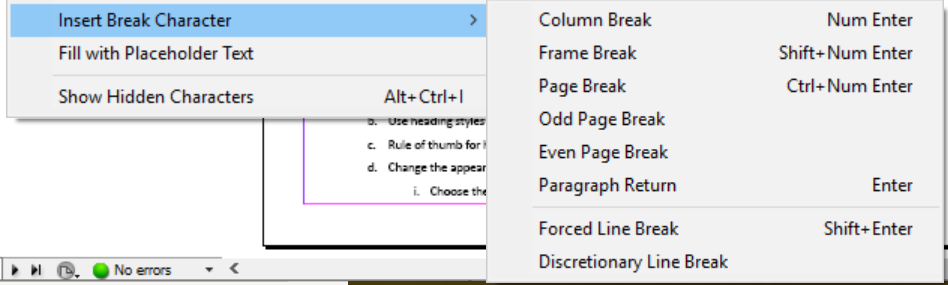
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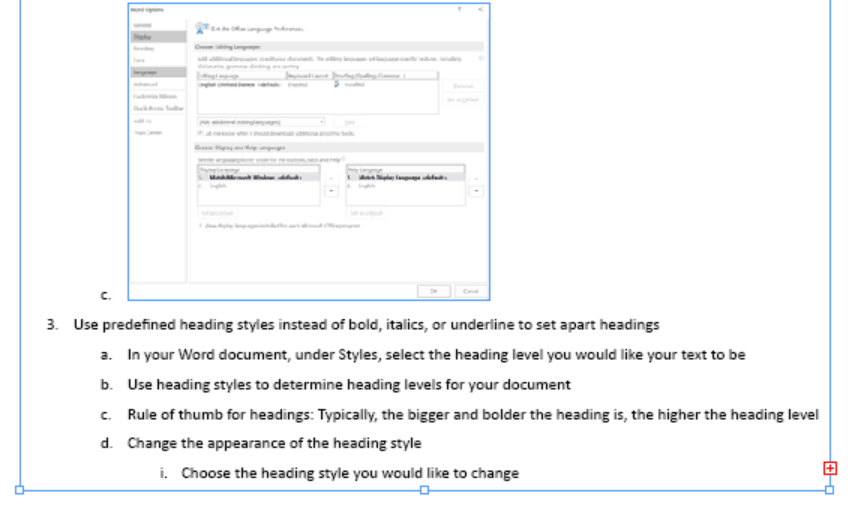
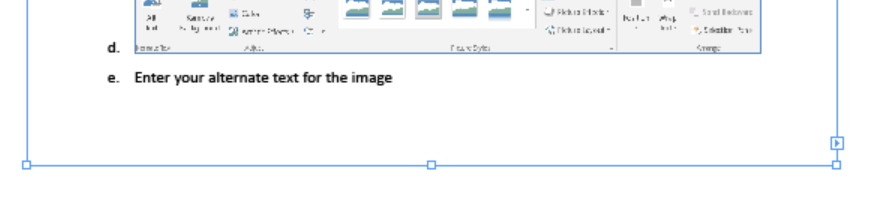
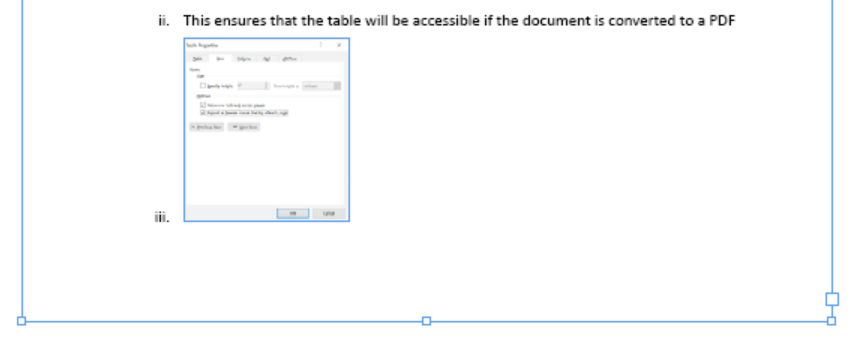
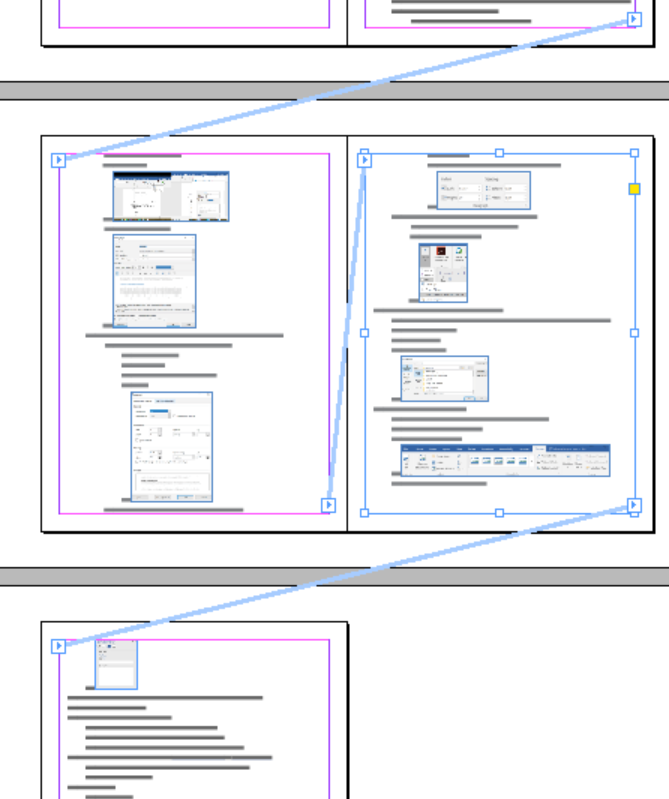
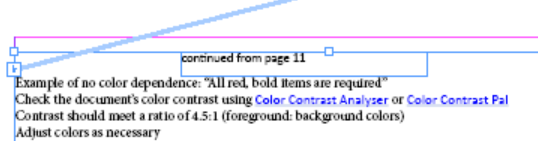
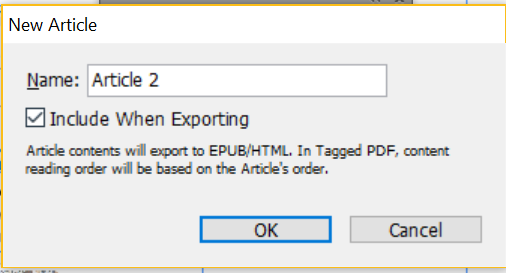
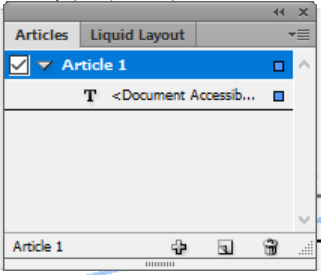
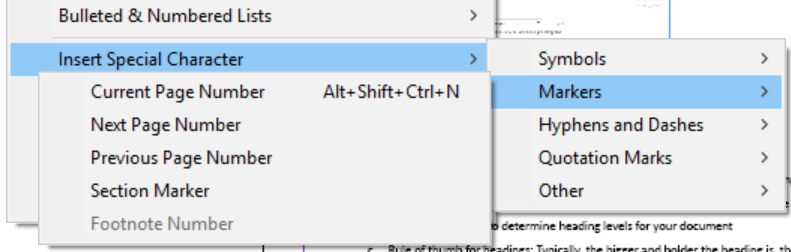
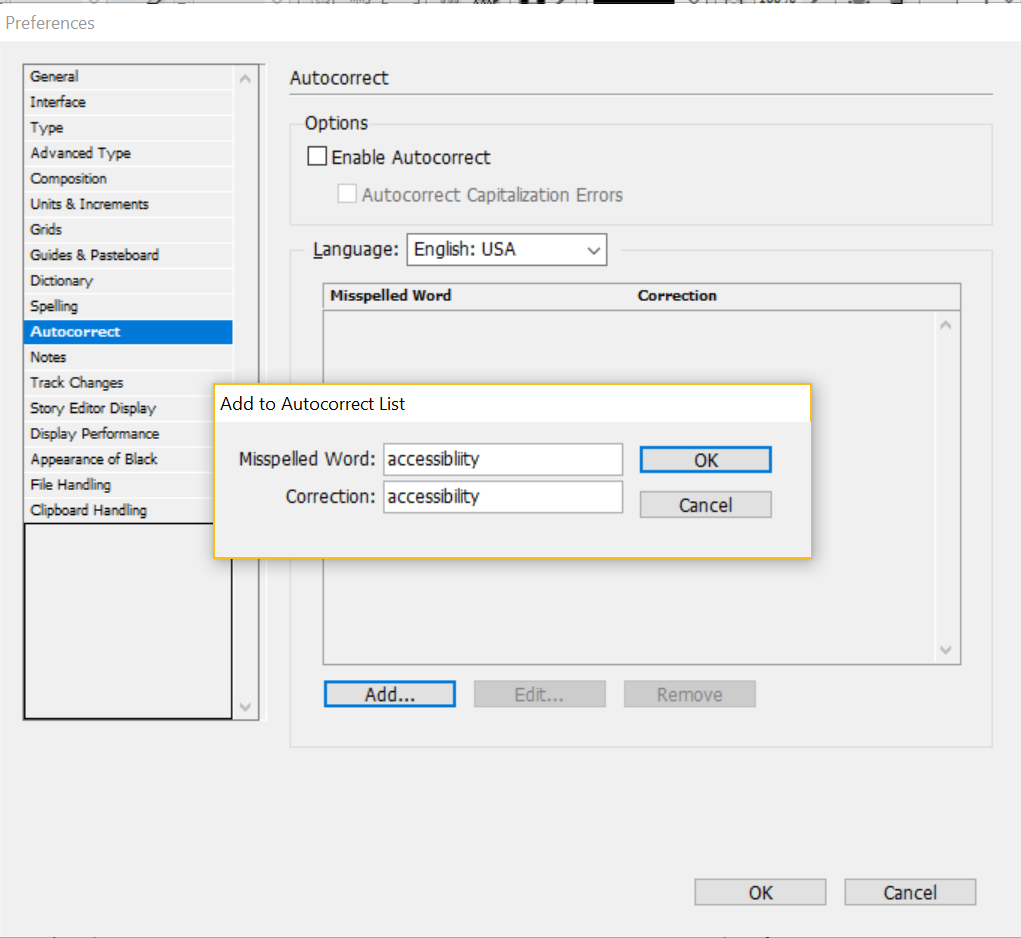
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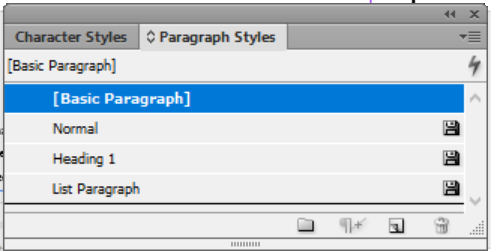
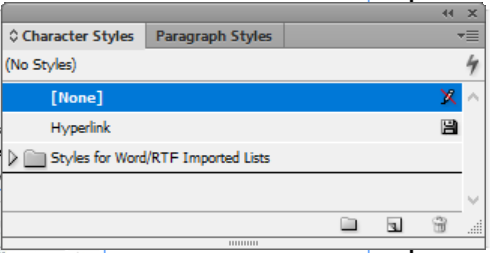
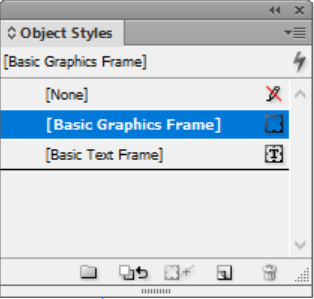
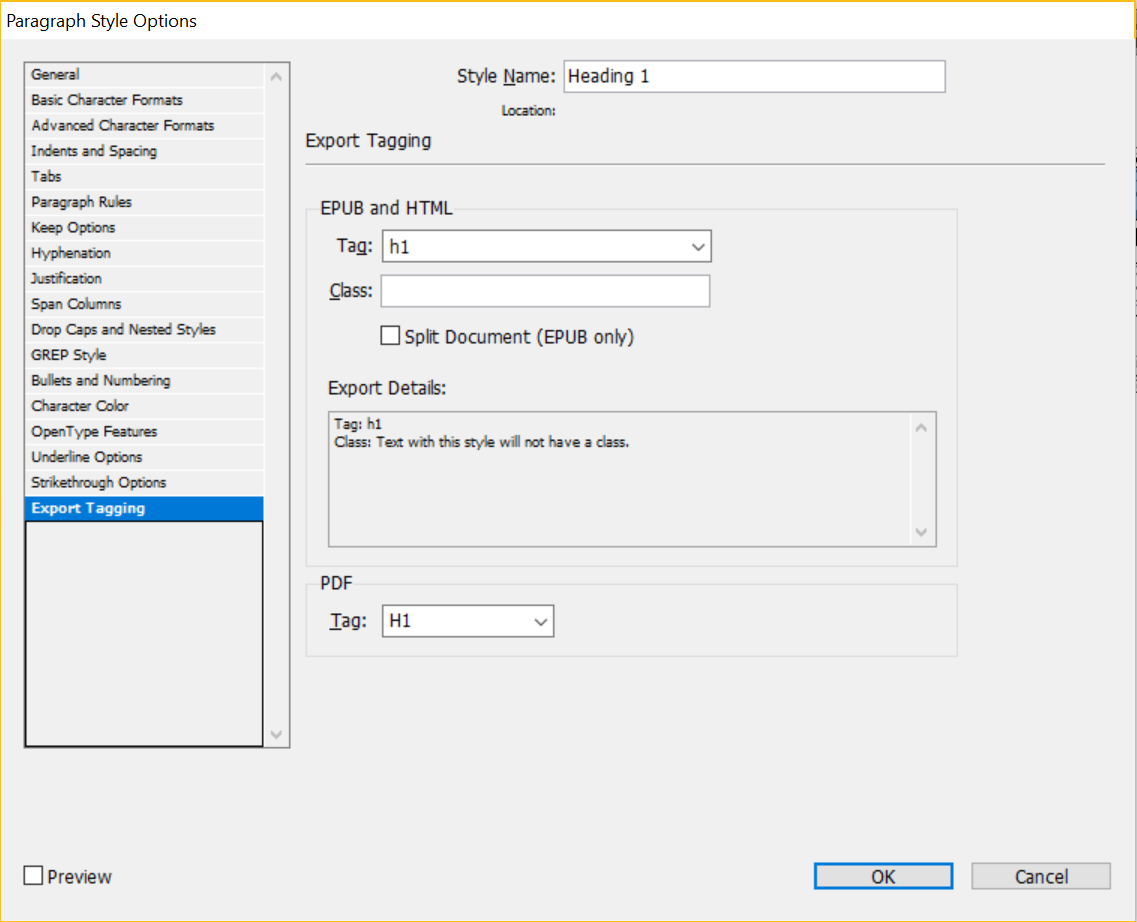
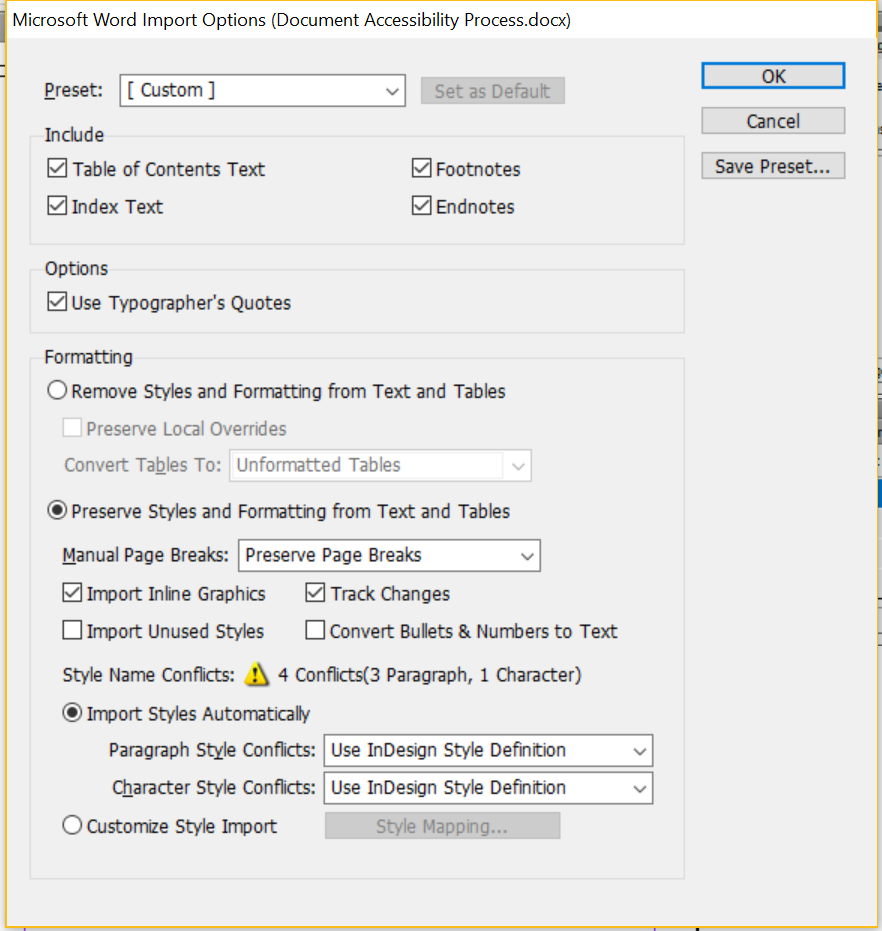
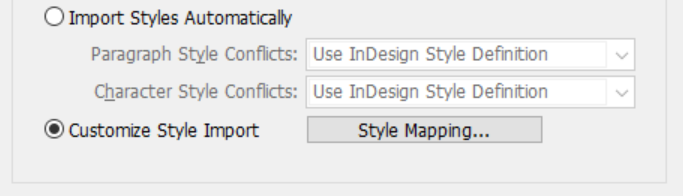
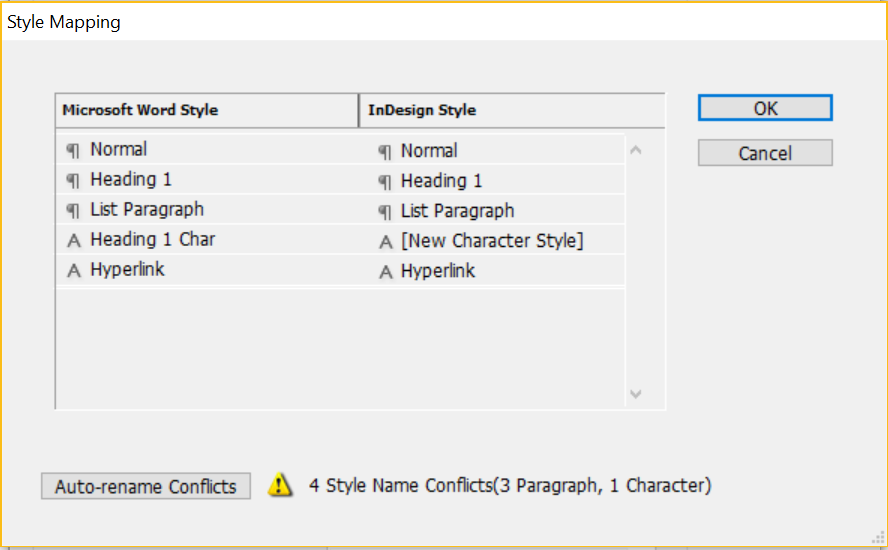
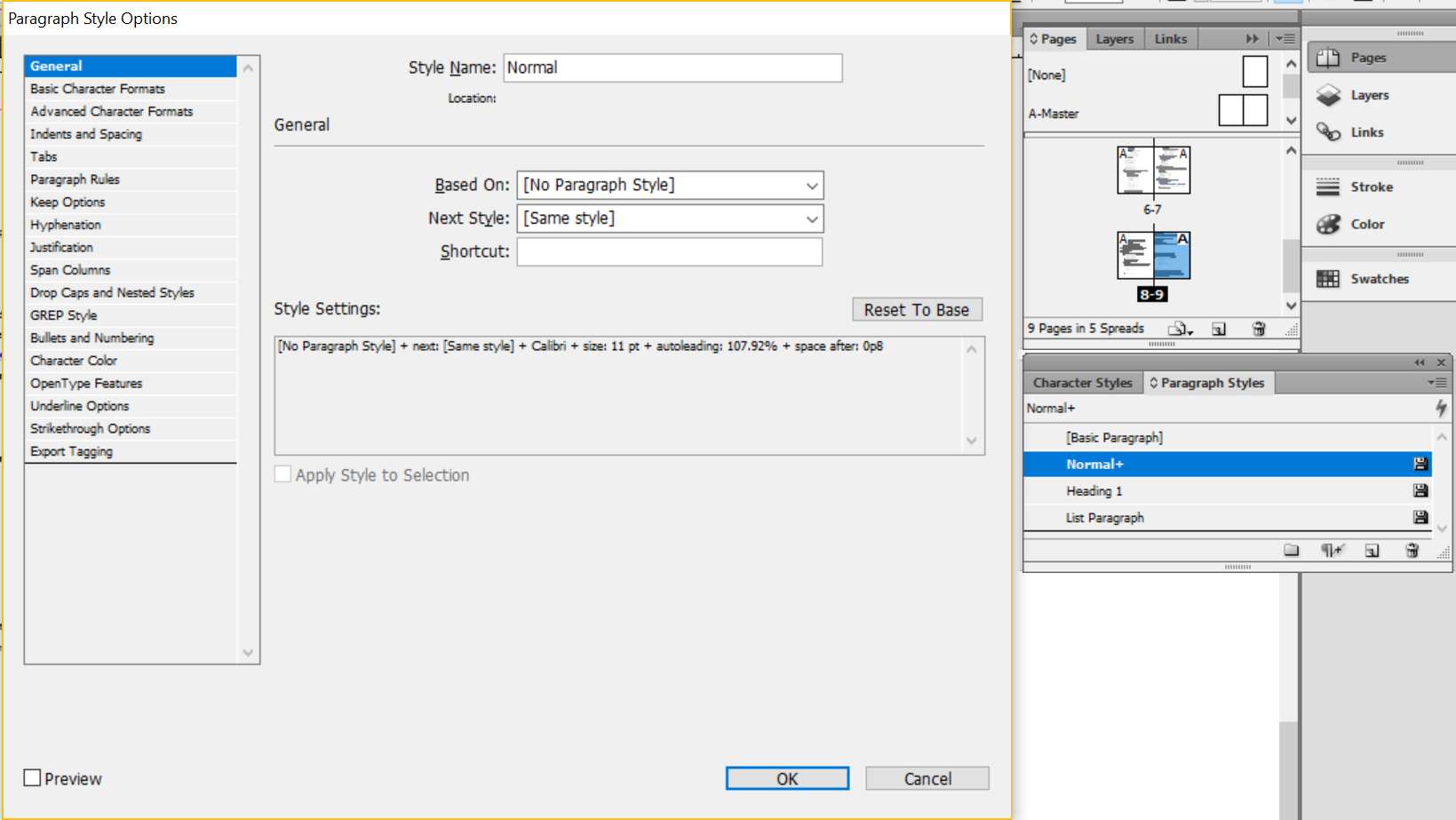
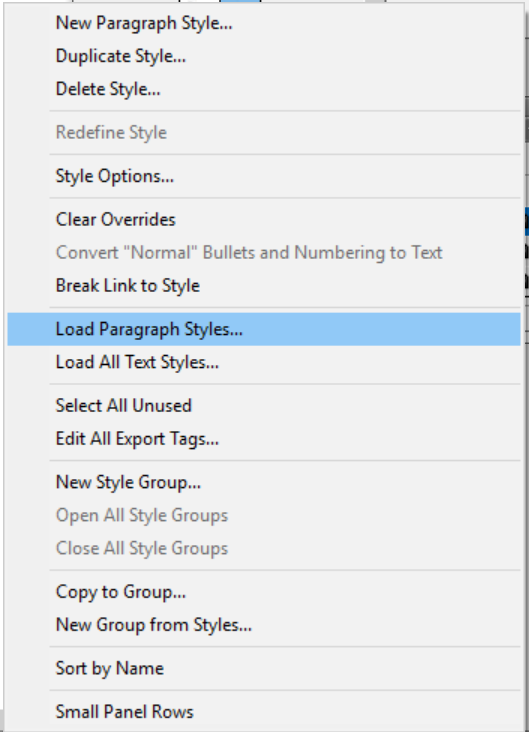
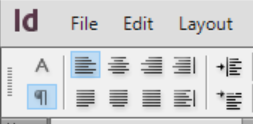
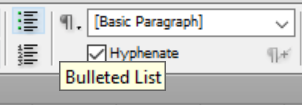
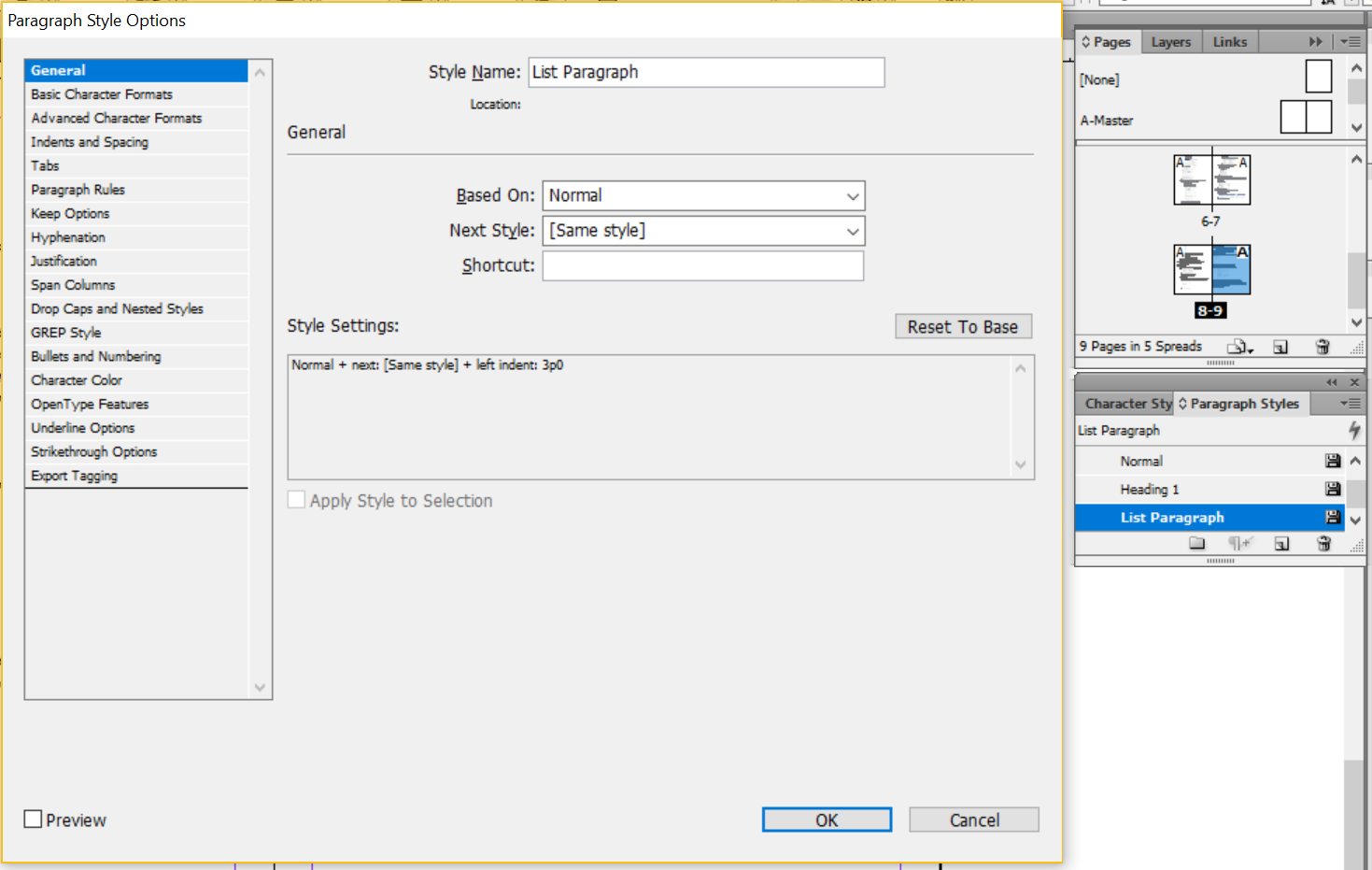
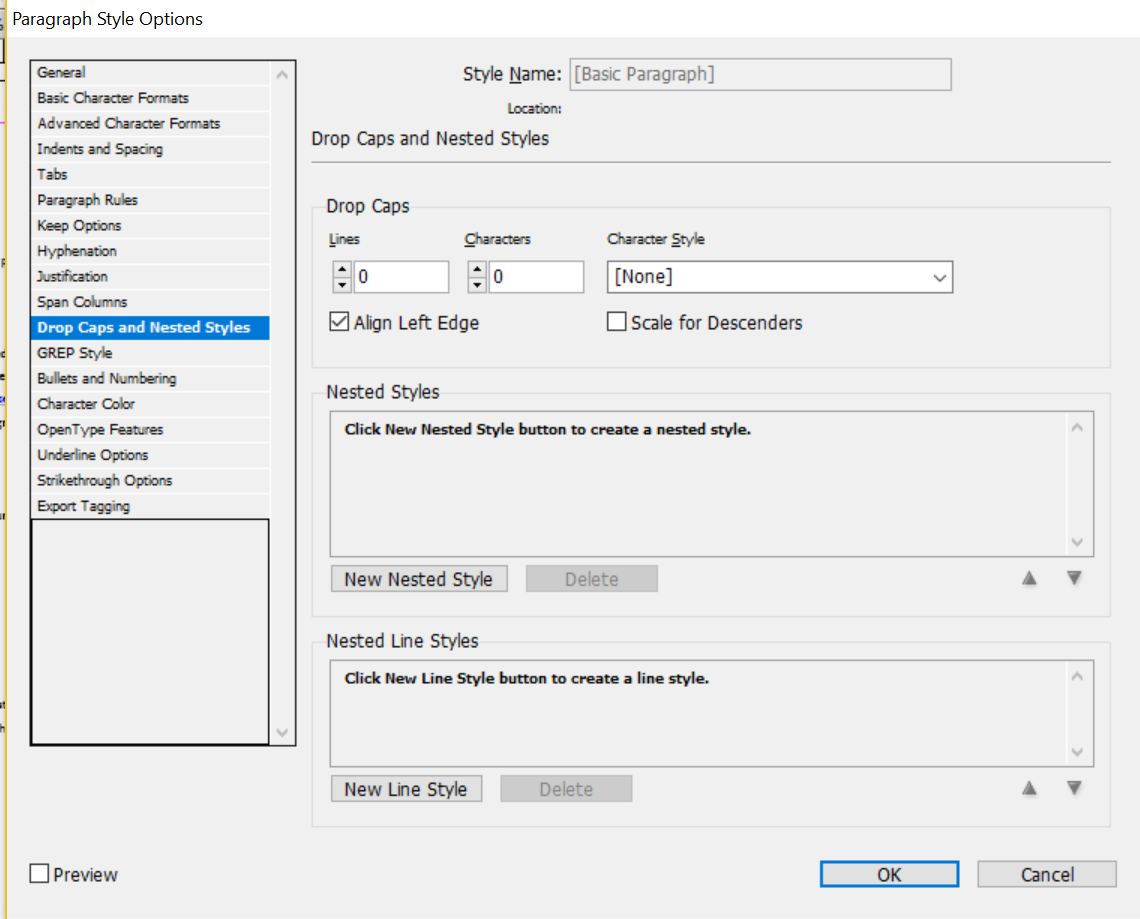
# Page Layout

* Master pages include common graphics and text for every page of your document
  + Use the master options to change master page properties, like master title
  + Can have multiple master pages
  + Open the Pages panel and double-click on Master page
    - 
    - The page you have selected appears in the bottom left corner of the window
  + To create a new master page, open the Pages panel
    - Click on Menu > New Master
      * At this point, you can choose to make a master page from scratch or to base it on another master page
    - 
  + To apply a Master to a page, click and drag the master onto the page to which it should be applied
  + Setting up a Master with a primary text frame is good for long, simply designed documents like books
    - When content is added, InDesign will automatically create new pages based off this primary page
* All of the settings for your final document should be in place prior to building the document
  + The one flexible setting is the number of pages
  + Prepare a few styles in advance of importing text
  + Adjusting the layout of your document: Objects will not automatically reflow after you change the layout, so it is important to initially set up your document how you’d like the final document to look
    - Changing document or page settings will not reflow your document
* You can save new document settings as a preset
  + There is a save button next to the document preset [custom]
* Use Paragraph Layout to set text or objects to span columns
  + 
* As you create objects, they stack from bottom to top
  + This is similar to how objects stack in PowerPoint
  + A screen reader will also interpret the reading order from bottom to top
  + To change object order, click on Object and select Arrange
    - Expanding layers will allow you to see all objects in a page
    - 
* To wrap text around an object, click Window and select Text Wrap
  + Select the object around which the text will wrap and click Wrap Around Bounding Box
    - You can also change the offset (space around the object)
    - 
      * For irregular shapes: Select object
      * In Window, choose Text wrap > Wrap around shape
      * 
    - You can manually change the wrap options
* To break the document into different sections:
  + Open the Pages panel and right click on the page that starts the new section
    - 
  + Click on Numbering and Section Options > Start from page… or Continue from previous…
    - 
  + To view a page, open the Pages panel and click the down arrow over the page thumbnail
    - Example of different sections: numbering an introduction as i-xii
* To insert a break character: Select the Type tool > Insert Break Character
  + This is similar to a page or column break in Microsoft Word
  + 
* To create a soft return (similar to a line break in Microsoft Word): Use Forced Line Break

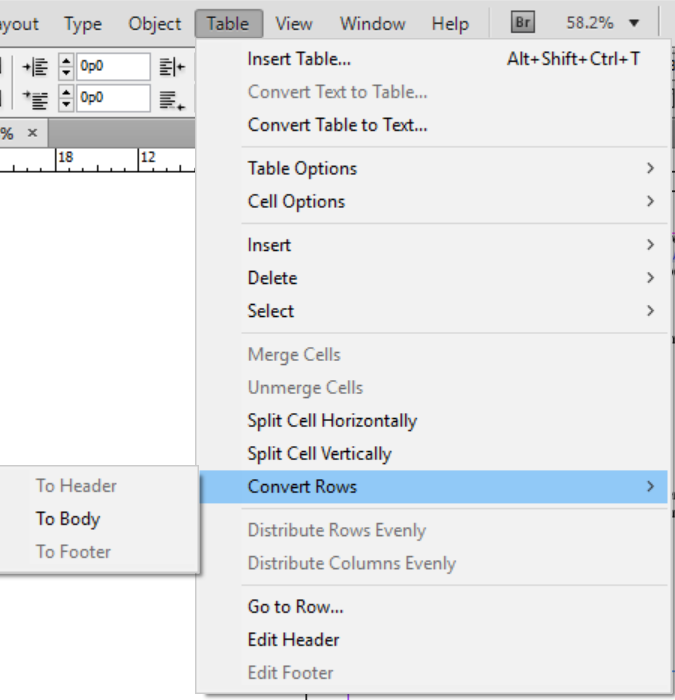
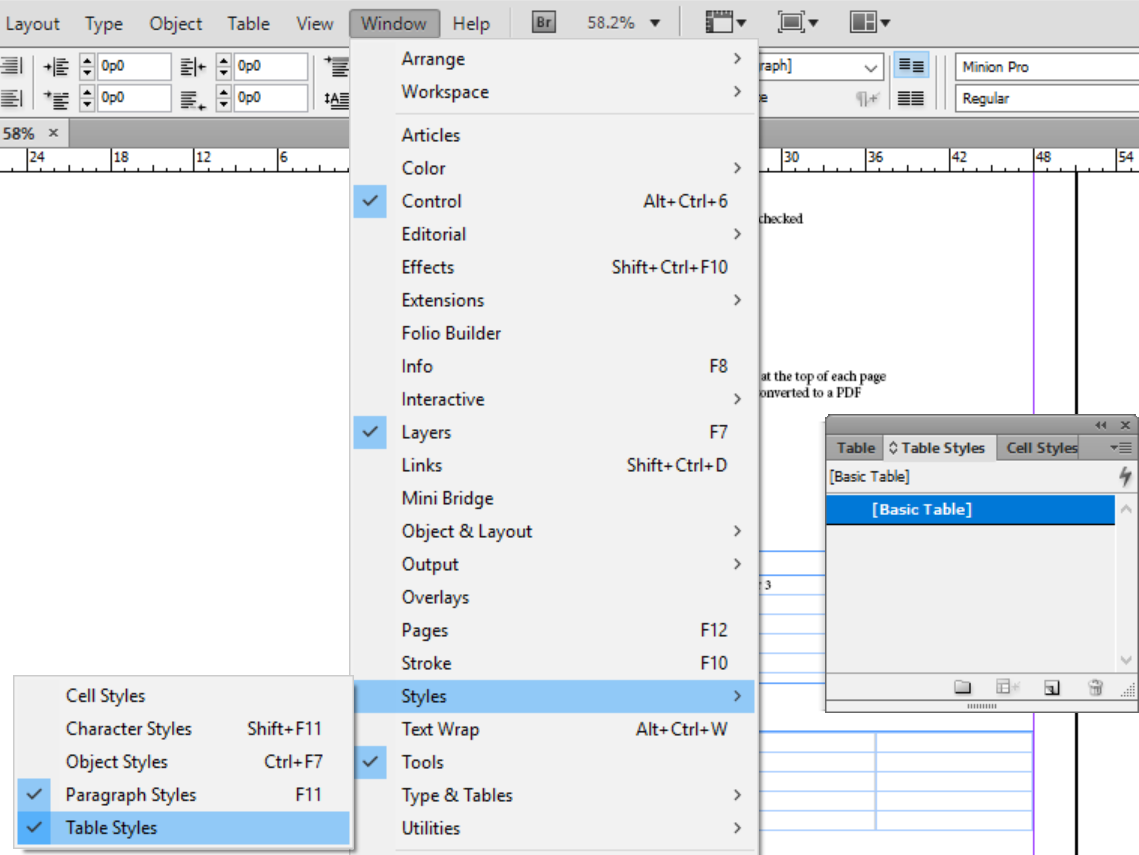
# Text

* Thread text: If text is overflowing a frame, click the red + symbol
  + 
  + This loads text into the cursor, so you can put the overflow text into another frame
    - Text threads are blue lines that show connected frames
    - A small blue arrow in the In Port frame shows the continuation of threaded frames
      * 
    - Empty or hollow In Port boxes show the start of the story
      * 
    - Select View > Extras > Show/Hide Story Threads
    - Threading helps reading order to be correct when exporting to PDF
    - 
  + Click and drag to create a text box for the threaded text
    - This is useful for stories, where you may want to continue on a later page
* Jump lines like “continued on page…” and “continued from page…”
  + To add these lines, create a new text frame and move it completely within the story frame
    - Type in the text of choice
    - Select Type > Insert Special Characters > Markers > Next Page Number (or Previous Page Number)
  + Then turn on text wrap in the story frame
  + To see where to set the “continued from page…” line, follow the text threads
  + 
* Use the Articles panel: Window > Articles
  + This takes all the pieces of a story and puts one section tag (<Sect>) around them
  + It also defines the reading order
  + Meant for one threaded story or one complex page: Does not work well when rolls over into the second page
  + Click on one piece of the article (Example: the article’s title) and drag into the Articles window
    - This will show a dialog box to create new article
    - Check off “include when exporting to PDF”
    - 
  + Drag all pieces of the article into the Article window
    - 
* To add page numbers: Draw a text box
  + Then select Type and click on Insert Special Character
  + Select Marker
  + 
* Use autocorrect for misspellings: Select Edit and click on Preferences > General > Autocorrect
  + Add in your common misspellings
  + Many common errors are preloaded
  + Can set it up to replace abbreviations or acronyms with full text
  + 

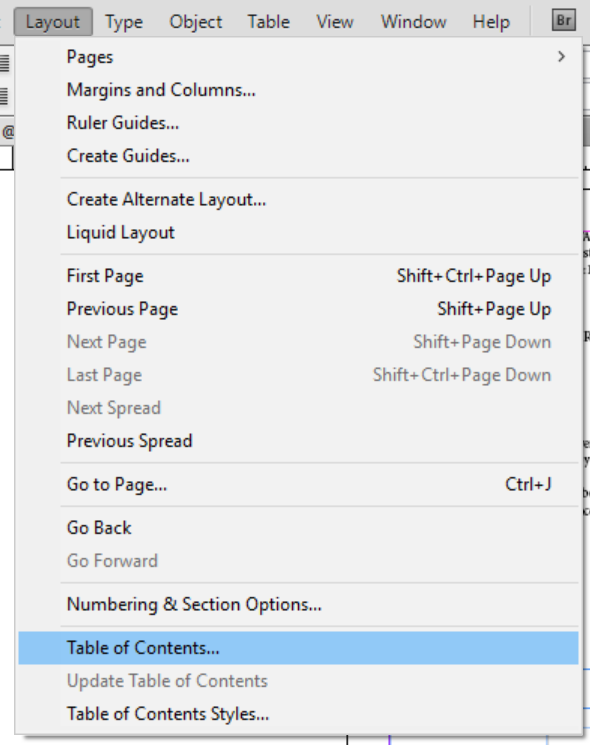
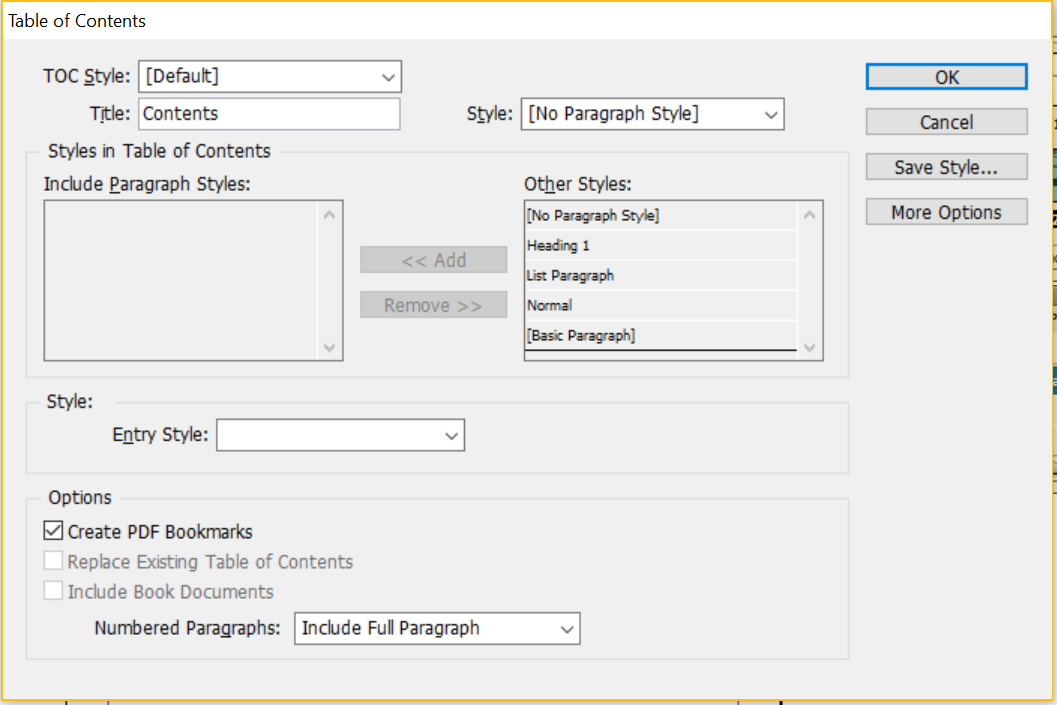
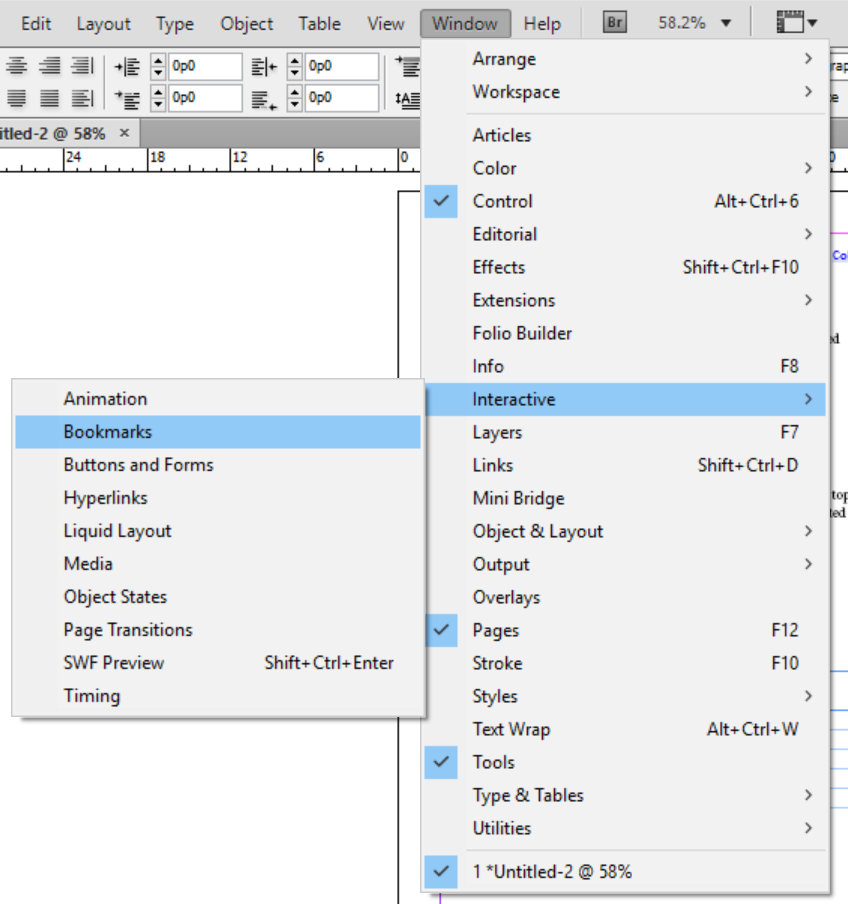
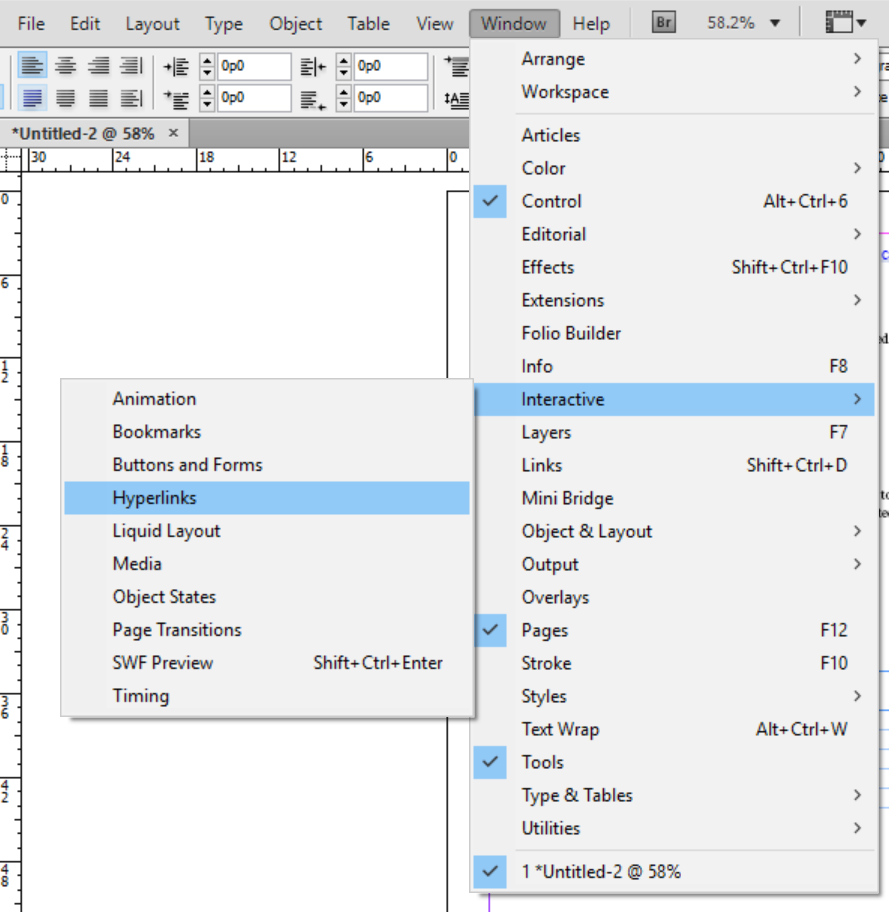
# Styles

* Use styles to keep formatting consistent
  + Click on Window and select Styles > Paragraph Styles (or any other style you would like to set)
    - Alt + New Style opens a dialog box for the new paragraph style
    - 
  + Changing a style updates any text where the style is used
  + Use character styles to change the look and feel of a character
    - Example: Making text bold or italicized, changing color
    - 
  + Object styles are very similar to paragraph and character styles
    - Select Window > Styles > Object
    - Be sure to check off Apply Style to Selection
    - 
* Click on each element to see what style is assigned to the text in Paragraph styles
* To ensure that a style exports with the correct tag, right click on the style
  + Select Edit (style name) > Export tagging
  + Set the appropriate tag in the drop down
  + The only automatic tagging you should use is for lists
  + 
* To bring text into the document: Click on File > Place
  + Preserve styles and select Show import options
    - 
  + Select Customize style import > Style mapping: This allows you to assign Microsoft Word styles to specific InDesign styles
    - Can also be used with your custom InDesign template
    - 
  + If choose [new paragraph style], not much of the styling is in your control: InDesign will just import all Word styles as best as it can
    - **Note:** You do not have much control over properties in brackets []
    - 
  + The bottom options allow you to define your style
    - Only need to customize headings and other text formats when you know you’ve used it in the Word document
    - All other styles can be mapped to [new paragraph style]
  + Must always define list styles (bullets and numbering)
    - Otherwise, tags will not be correct when exported to PDF
  + The only time you can do style mapping is prior to placing text
    - Otherwise, have to start over or manually fix
* Right click on a style to change it and select Redefine Style
  + This applies to paragraph and character styles
  + Apply changes to text and select Redefine style using updated text
  + Check Redefine Style when changing all fonts: This will change the style and all text that uses the updated font
    - Find all text using a style with the Find and Change dialog box: Select Edit > Find/Change
      * Can use this to find and replace formats
      * This relies on defining styles ahead of time
    - 
* Load styles from other documents by opening the Paragraph styles panel
  + Click on the hamburger menu and select Load Paragraph Styles
  + 
  + InDesign will ask where the styles are located: Choose the document from which you want the styles and select the styles you want
* Bullets and numbering: Open the paragraph control panel by double clicking on text and switching to the Paragraph panel
  + 
  + Click on bullets/numbering
    - 
  + Change the style using the Paragraph panel menu and selecting bullets and numbering
    - Allows you to change the numbering style, how much space is between the bullet or number and the text, the bullet or number’s color, etc.
    - 
  + Only use Unicode characters for bullets, not WingDings or similar characters
* Nested Styles: Double click on a Paragraph style and select Drop caps and nested styles in the dialog box
  + 
  + Nested Styles are similar to CSS in that there are parent and child styles
* Do not use skew to create false italics: This does not change the code to show emphasis

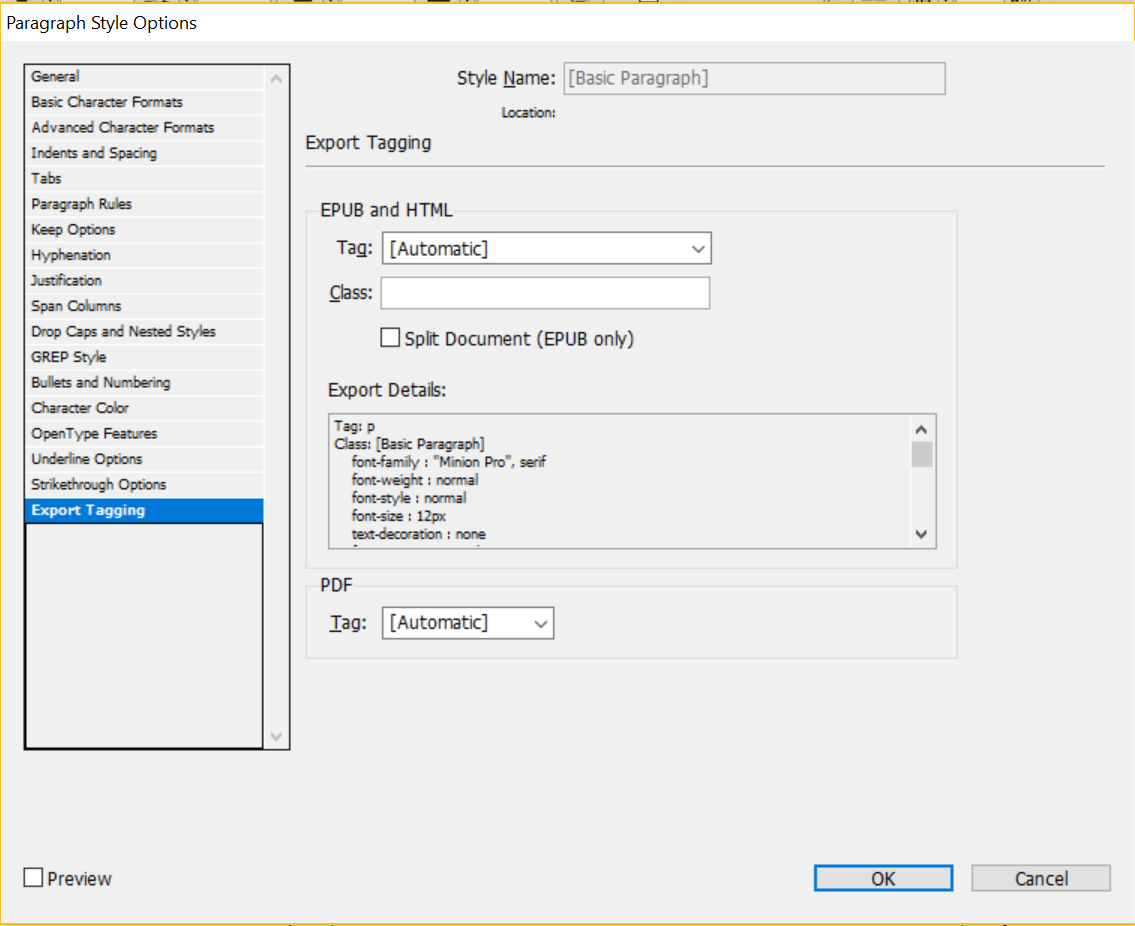
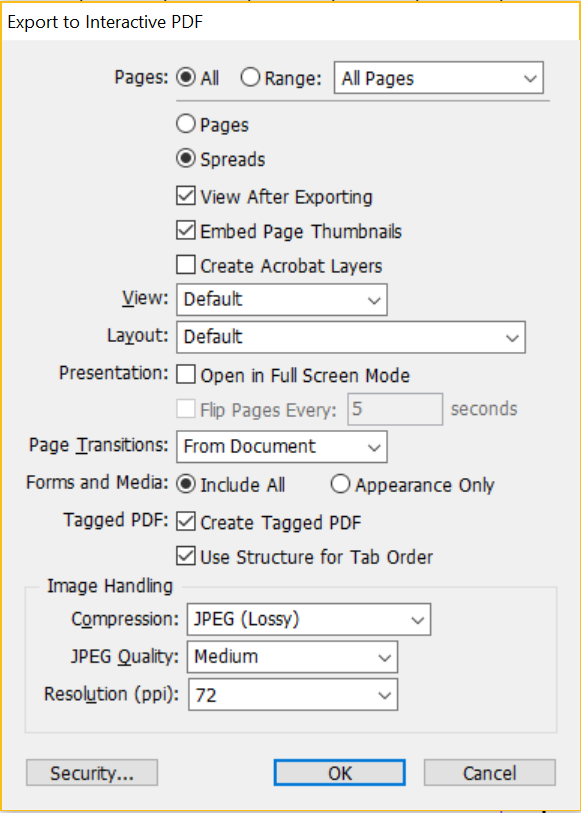
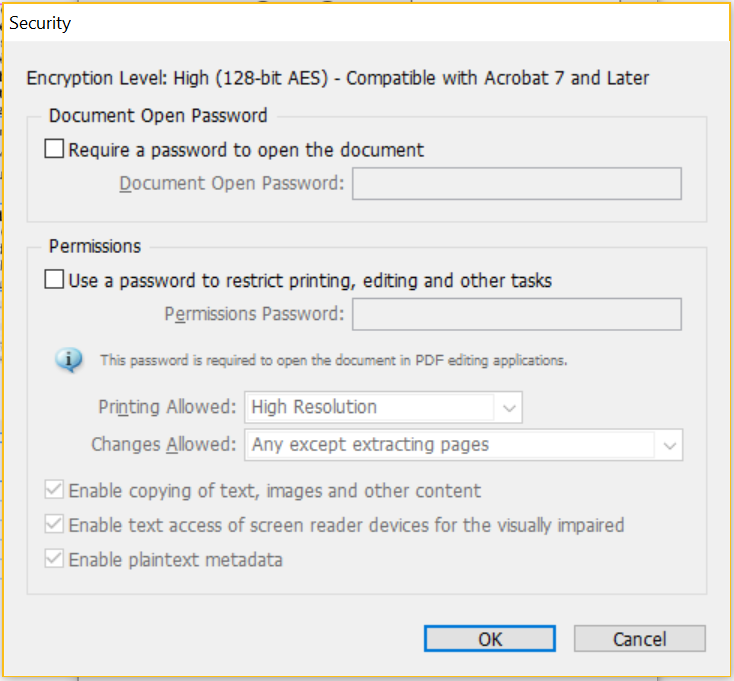
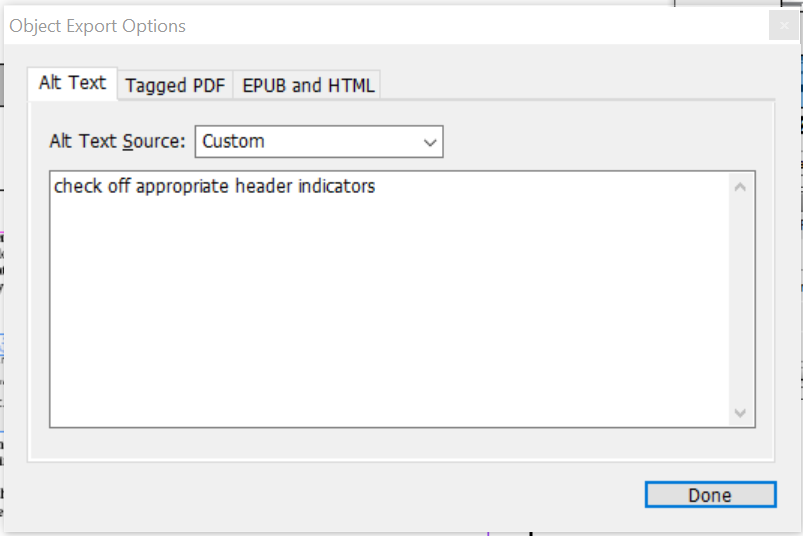
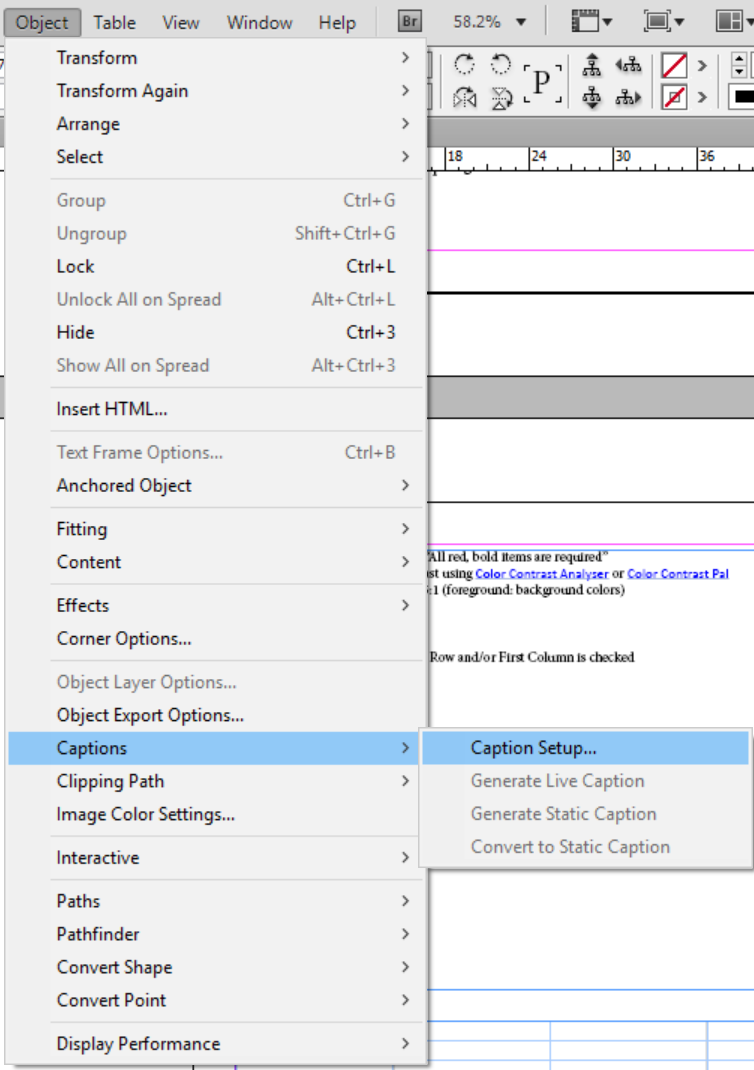
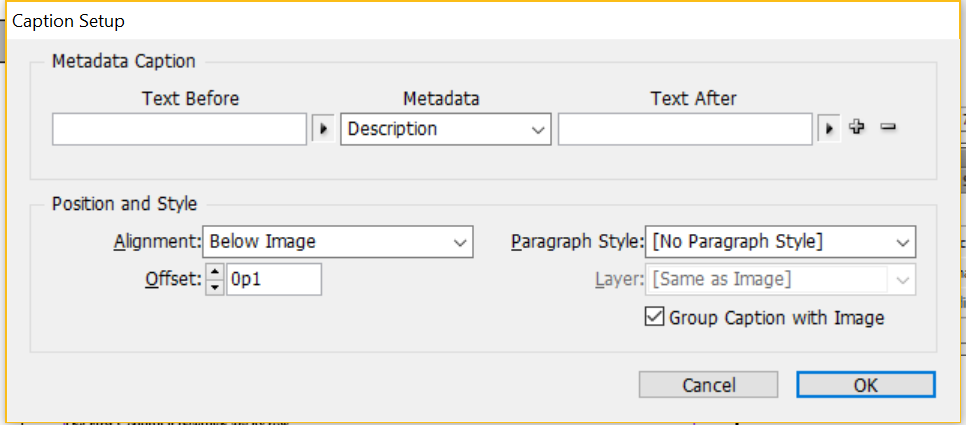
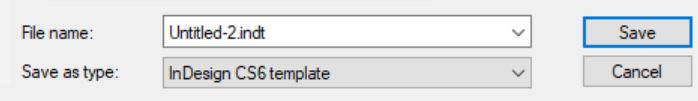
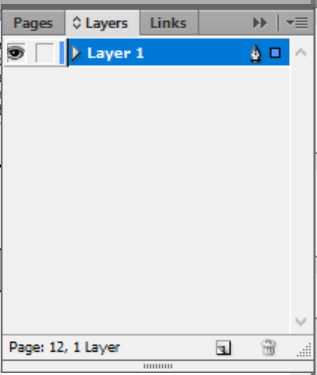
# Tables

* To draw tables, use the Type tool to draw a box
  + Table tool can be used after drawing the frame
  + Click Table > Insert Table to set up your table
  + Use Table > Table Options > Table Setup to set header and footer rows
    - table setup dialog box
      
  + Use tab to add rows
* To set table headers and footers from existing rows:
  + Select a row
  + Click Table and choose Convert Rows
  + 
* You can embed styles into table styles
  + 
  + Select Window > Styles > Table styles to edit table style
* Convert table to text: Select Table > Convert table to text
  + Set options like column and row separators
  + Text is separated by tabs, which shows InDesign how to create columns
    - New paragraphs show where rows should be

# Interactive

* Table of Contents: InDesign knows the Table of Contents based on headings defined in Paragraph styles
  + Select Layout and click Table of Contents
  + 
  + Include paragraph styles
    - Example: Heading 1
    - Table of Contents styles are automatically created when you generate your Table of Contents
    - 
  + You can automatically create bookmarks in your PDF from the Table of Contents
  + You can also automatically create text anchors in the source paragraph, which allows you to click and jump directly to that point
  + Include all book documents in your Table of Contents
  + Manually set page number styles for any paragraph styles included in the Table of Contents
* To create bookmarks: Select Window > Interactive > Bookmarks
  + Select the text you would like to be your bookmark and click Create new bookmark
  + 
  + When exporting to PDF, click Include bookmarks
  + Add bookmarks to any document where you want users to know information, especially if that information is not on the first page
* To add hyperlinks, select Window > Interactive > Hyperlinks
  + 
  + Select the text you would like to be your hyperlink and type in the URL
  + Can also set links to send to file, email, etc.: Create a new hyperlink from the hamburger menu
  + InDesign automatically creates a character style called Hyperlink, which you can edit

# Miscellaneous

* To create an accessible PDF: Select Paragraph styles and select Style options
  + Select Export Tagging
  + Select the appropriate PDF tag
  + 
  + Do a 1:1 match: Leave lists, footnotes, and endnotes as is, but check the mapping of other styles
  + Always save before sending to PDF
  + Choose File > Export >Save as type > PDF Interactive
    - In the export dialog box, export as pages (not spreads)
    - Check the boxes for Create tagged PDF and Use structure for tab order
    - 
* Under Security, enable text access of screen reader by checking the box
  + 
* To add alternate text to images:
  + Select Graphic and then click Object
  + Under Object, select Object export options
  + In Object export options, select Alternate text source > Custom
  + Input your text
  + 
* Add metadata captions:
  + Select Object > Captions > Caption setup
  + 
  + Change metadata type to Description
  + Group captions with image
  + Fill out the description field for each image and enter descriptive text
    - This will be used as captions
  + 
* Add swatches and styles to your Creative Cloud library: Window > CC Library
  + Click on the swatch or characters with styles and add to library
  + Can add graphics to library as well
  + Easy to use between documents
  + Can share the library with other documents and users
* To save InDesign templates, click File
  + Select Save As and save the file as a .indt file
  + 
  + When opening the template, can open as a new blank document (normal), the original template, or a copy of the template
    - The default open is as a new blank document
* Stick to a single layer using the Layers panel: Window > Layers
  + 
  + Adding additional layers changes the reading order dramatically
  + Click and drag objects in the Layers window to reorder: This affects the PDF’s reading order
    - Check off Use for reading order in tagged PDF
  + If you must use multiple layers, flatten before exporting to PDF
    - You will have to manually check the reading order, because it will be changed in the PDF