

Dedication

To all of my friends, seniors, companies with whom I have had the pleasure to work, particularly Deepak Gupta, Baljeet Singh, and Sudhanshu, who helped me in writing this book.

A special thanks to Preeti Verma who inspired me for teaching and writing study materials, who provides me with continuous support and caring.

Adobe InDesign® Teaching Plan (60 Hours)

Compiled by

Deepak Aggarwal

An initiative by:

Typesetting.in - Template Design and Formatting

Self Study InDesign Handbook- Free for All

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Template design and formatting

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Week 1

WEEK AT A GLANCE

Day 1	Day 2	Day 3	Day 4	Day 5
Typesetting Introduction	Grid and Typography	Working with PDFs	Math Type	InDesign Basic Tool and Control Palette
<p>Intro about Typesetting Industry</p> <p>Typesetting Process</p> <p>Type of Books</p> <p>Standard Style Naming Convention</p>	<p>Grid</p> <p>Technical Terms</p> <p>Typography</p> <p>Quiz cum Group Discussion</p>	<p>Type of PDF: Embedded/Non Embedded, Scan or Editable</p> <p>Extracting Text and Images</p> <p>Extracting Specification: Color, Font, Font Size</p> <p>Measuring</p> <p>OCR (Optical Character Recognitions)</p>	<p>Create Equations</p> <p>Find Symbols and Characters from Character Tool Palette</p>	<p>How to Create New Documents</p> <p>Workspace: Menu, Ruler, Tools, Palettes etc.</p> <p>Tools</p> <p>Control Palette</p> <p>Technical Exercises</p>

Typesetting Introduction

Brief Intro about Typesetting Industry

Publisher					
Author					
Editor					
Composition					
Typist	Coder	Compositor/Typesetter			
		Layouting	Images		Equations
			Photos	Line Arts/Portrait	
MS Office Epsilon	MS Office	InDesign Quark PageMaker Corel Ventura 3B2	Photoshop	Illustrator CorelDRAW	Math Type Power math In math Math Monarch
Proofreader and Quality Controller					
Indexer					
Printer					
<p>Other Supporting Person</p> <p>Photographers: Who Provide Photos</p> <p>Artist: Who create the Portrait/Cartoon basically (BFA: Bachelor of Fine Art)</p>					

Typesetting Process

Input	Process	Output
Project Row Data, Project Supported Information Standards of Client	Analysis Keying Setup/Sampling Composition Art work Proofing/QA	PDF Achieve: Systematic Arrangement of Files Application File Fonts Links (all images)

3 Type of Books

(STM) **Scientific:** Science Book which contains specially bonds and scientific images

Technical: Related to electronics Items like mobile, freeze, computer, photostat machine etc.

Mathematics: Contains Equations specially

Accounting Children Books Journals Multilingual Typesetting and many more...

Typesetting Process

Input

'Input' is all the Material, Informations & Instruction which are provided by client. 'Input' can be divided into three categories:

1. Project Row Data
2. Project Supported Informations
3. Standard of Client

Project Row Data

The data which are compulsory for design the books. This can be MSP, Text Files, Art Log, Arts,

Project Supported Informations

The data in the form of instructions, which are necessary for design the project. It includes, Specs, Sample, Design Layout, Template, Pattern Volume or Tearsheet etc.

Standards of Client

Standard Rules & Regulation of every client which are used in each and every project provided by him. He sends these specification once. We use these specifications in all project until client get changed them. These standards includes "File Naming convention, Postscript/PDF Option, Printer Details, All Preferences, Punctuation, Greek Characters, Workflow of Job, Final Deliverable Format, Description

Process

Owner/Management

1. Analyses and Castoff
2. Fix the Deadline (Give by Client)
3. Judge the Manpower (appoint more employee, if required)
4. Judge the Availability of Tools (InDesign, QuarkXpress, 3B2, PageMaker, or Framemaker etc...)
5. Maintaining the Supporting Working Condition for all (AC, Seats, Lunch, Refreshment...)
6. Appoint the Job Lead for the project

Work of Job Lead

7. Distribution of Job to his colleagues according their knowledge and skills
8. Announce a Work Flow for job for running the project smoothly and maintain the consistency
9. Inform his owner for everything either complain, suggestion or requirements and status of work day to day.

Task in the Book

Now before moving ahead, we will see how many task may need to be done in a book. We differentiate these task in two categories "Direct Task" and "Supporting Task".

Direct Task

The task which are directly connected with the project/book. These are as below:

- | | |
|------------------------|------------------|
| 1. Analysis | 5. Editing |
| 2. Setup and Composing | 6. Indexing |
| 3. Proofing | 7. Keying |
| 4. Art work | 8. XML (for web) |

Supporting Task

The task which are indirectly connected with the project/book

9. Announce a Workflow of job for running the project smoothly and maintaining consistency.
10. Generate check list for every task for making consistency as well as avoiding error, improving the productivity.
11. Generate all the supporting records for future reference and multi- tasking.
12. Introduce the QAR (Quality Analysis Report) for improving the quality day by day.

Standard Style Naming Convention

Heading Styles

PN	Part Number
PT	Part Title
PTX	Part Text
CN	Chapter Number
CT	Chapter Title
CO-TX	Chapter Opener Text
CO-OBJ	Chapter Opener Objectives
H1	Heading 1
H2	Heading 2
H3	Heading 3
H4	Heading 4
H5	Heading 5

Text Styles

TX	Text
BL	Bullet List
NL	Number List
LL	Letter List
WL	Where List
EXT	Extract
FTN	Footnotes
EQ	Equation

Figure Styles

FN	Figure Number
FC	Figure Caption
FSO	Figure Source
FNO	Figure Notes
Label	Labels (of image)

Table Styles

TN	Table Number
TT	Table Title
TSH	Table Straddle Head
TCH	Table Column Head
TB	Table Body
TSO	Table Source
TNO	Table Notes

Box Styles

BOX-NUM	Box Number
BOX-TT	Box Title
BOX-TX	Box Text
BOX-BL	Box Bullet List
BOX-NL	Box Number List
BOX-LL	Box Letter List
BOX-WL	Box Where List
BOX-EXT	Box Extract
BOX-FTN	Box Footnotes
BOX-EQ	Box Equation

Exercise Styles,

Example Styles

Special Elements i.e. Tips Boxes

Number of style could be increased or decreased book to book.

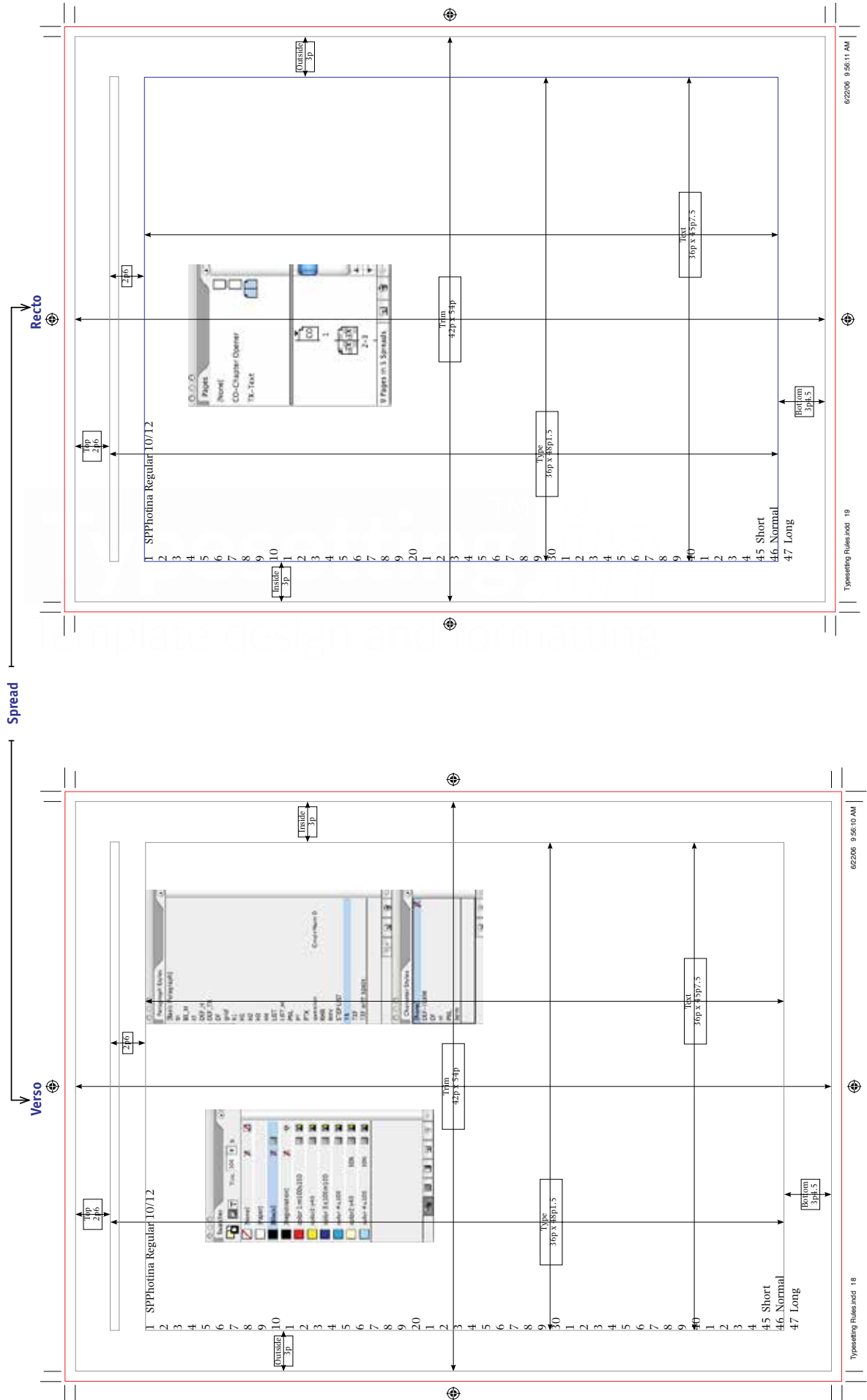
Beside this there are lots of tag which are used for front matter , back matter etc. Here are some example

fhtp-tt	Front Half Title Page Title
ftp-tt	Front Title Page Title
fco-tx	Front Copyright Page Text
ftoc-tt, ct, h1	Front TOC Page styles
bm-tt	Back Matter Title
bm-tx	Back Matter Text
rhv	Running Head Verso
rhv	Running Head Recto
folio	

Grid and Typography

Grid	Other Most Useful Technical Terms
Trim Type Area Text Area Margins Running Head/Feet Folio/Drop Folio/Blind Folio Verso Recto Spread Template	MSP TSP Design Layout/Sample Pattern Volume Fonts: Sans and Sans Serif Fonts Process Color Spot Color RGB Colors Bleed Blurb Text Spine Jacket
Typography	
Character: Ascender, Decender, Baseline, X-height, Mean Line, Cap Height Type of Fonts; San, Sans Serif, Script Leading Greek Characters Measurements: inches, picas, points	

Grid



Technical Terms

Terms

MSP Manuscript Page: The book in typewritten or word processing form.

Spot Colours are premixed special colour, which are available in print market independently. These are used for saving the printing cost and for giving the consistency in color. 'Pantone Family' is the best example of spot colors.

Remember: All the color are made by the combination of CMYK. If you are creating any color by mixing of these four colours, project will remain four color project but if you use/add any spot color like "Pantone 3721 or any other pantone family" then this job will become 5 color project. If we have used spot colour in the book then according to process of Printing Technology we require 5th Palette for print the spot colour. Generally we work in four plates - CMYK.

Trim The final dimension of a book after the printer or bindery has cut it to size.

Type Trim – margins

Text Trim – (margins + running head/running feet)

Bleed An element that extends to the trim is called Bleed.

Sometimes client requires few pages highlighted that can be identify without opening the book. In that case on those pages typesetter use bleed option. Specially bleed is used for avoiding a white hair line in printing when we need to extend any art to trim. The standard of bleed is 9pt.

Ligature In typography, characters that are bound to each other, such as "fi, fl, œ, æ."

Terms

Index is a systematic arrangement of entries designed to enable users to locate information in a document. The process of creating an index is called indexing, and a person who does indexing is called an indexer. There are many types of indexes, from cumulative indexes for journals to computer database indexes.

Who can create the Index In the United States, according to tradition, the index is the responsibility of the author. Most authors do not actually do it. While a few publishers have in-house indexers, most indexing is done by freelancers, often working from home, hired by authors, publishers or packagers.

How is indexing done? Often at the same time as final proofreading is being done by someone. The indexer reads the page proofs, making a list of headings and subheadings (terms to appear in the index) and the location of each pertinent reference. After completing the rough index the indexer edits it for structure, clarity and consistency, formats it to specifications, proof-reads it and submits it to the client in hard-copy form, on in electronic format. Since the indexer is very late in the production process, there can be unreasonable time pressure.

Editing is done by editor. He is responsible for improving the language, remove the grammetically mistake and inorm to client for any other modification in data.

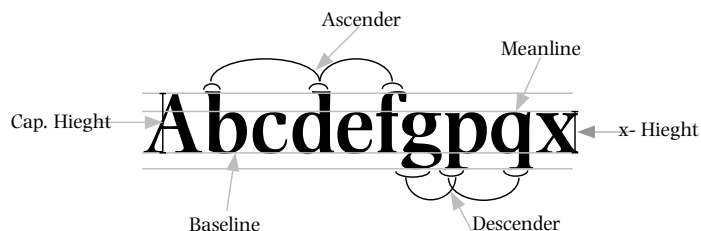
Who can do the Editing Only a person who is having entire knowledge of topic of the book can do the editing. If he does not have complete information, knowledge of the subject of book he can not improve the language or edit the terms.

Typography

Character

A letter, numeral, symbol or mark of punctuation is called the character. Each character stands on an imaginary base line.

Technical Terms of the Character:



1. **Baseline:** An imaginary line where all characters stand.
2. **Meanline:** An imaginary line which goes parallel to baseline from top of lowercase (small) "x".
3. **Cap Height:** Height of capital letter from top to bottom.
4. **x-height:** Height of a lowercase 'x' from top to bottom.
5. **Ascender:** Character which extends above the x-height or meanline. e.g., b, d, f etc.
6. **Descender:** Character which extends below the 'x-height' or baseline. e.g., g, p, q etc..

Typefonts

Different type of fonts. We can differentiate fonts in following different categories:

1. **Serif Fonts:** Edge in the font. Characters with a small line projecting from the top or bottom of the main strokes of a letter of character is known as serif font. e.g. Times New Roman, Baskerville etc.
2. **Sans Serif Fonts:** Without edge. Character without serif e.g., Helvetica, Century etc.
3. **Script Fonts:** Artistically drawn character which looks like handwritten fonts e.g., *Davis hand*, *Ballerie* etc.
4. **Typewriter Fonts:** Character looks like typewriter printout e.g., ITC American Typewriter, Line Printer etc.
5. **Monospace Fonts:** Each character in this type has same width, which is generally used to set computer language and statement e.g., Courier, Prestige elite etc.
6. **Blackboard Boldface Fonts:** Character with double backs are often used by mathematicians to indicate boldface on the blackboard. Generally these characters are typeset in bold face. e.g.: \mathbb{A} , \mathbb{B} , \mathbb{Z}

Typeface and Typestyle

Typeface: The body or face characteristics of a complete font of type. A type font may be Roman, **Bold**, *Italic*, Condensed, Wideface etc.

Typestyle: There are various styles of typesetting the elements such as: ALL CAPS, SMALL CAPS, CAP AND SMALL CAP (C/sc), Cap & Lowercase (C/lc) and Initial Cap (I/c)

Quiz cum Group Discussion

Bleed	Process Color
Blurb text	RGB Colors
Ascender, Descender, Baseline	Recto, Verso and Spread
Design Layout/Sample	Running Head/Feet
Folio/Drop Folio/Blind Folio	Spine
Fonts	Spot Color
Greek Characters	X-height, Mean line, Cap Height
Jacket	TSP
Leading	Template
MSP	Text Area
Margins	Trim
Measurements: inches, picas, points	Type Area
Pattern Volume	Type of Fonts; San, Sans Serif, Script

Working with PDFs

Type of PDF: Embedded/Non Embedded, Scan or Editable

There are two type of PDFs. One is called embedded and other “Non embedded”. Embedded PDFs are those PDF which are created by any application whereas non embedded are scan PDFs.

Lets take an example. Let assume that you have created a CV in MS Word and converted it into a PDF. Now when you will open this PDF, you can see the fonts, size and other specification in acrobat. This is called an embedded PDF.

But in another case if you have taken the print of CV and then scan this page and converted to PDF. Now actually this page is an image now. In which you can't see the font, size and other specification. This is called Scan/Non embedded PDF.

Extracting Text and Images

Extracting Text: If you have embedded PDF you can extract text by a single hit. Just go to

File ⇒ **Save As**

Extracting Specification: Color, Font, Font Size

Open Advance Editing Toolbar :

Tools ⇒ **Advance Editing** ⇒ **Show Advance Editing Toolbar**

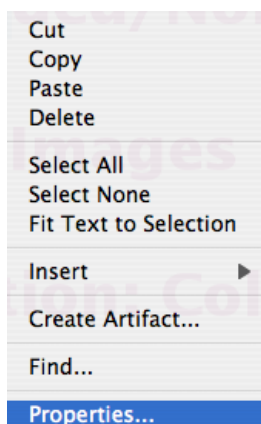
Open Advance Editing Toolbar :

Select Text Tools



Open Advance Editing Toolbar :

Now select the text in the PDF for which you want to know specification. And press right click and select “Properties”. Then you can see the Font, Font Size etc for the selected text.



Measuring

Open Measuring Toolbar :

[Tools](#) ⇒ [Measuring](#) ⇒ [Show Measuring Toolbar](#)

And now you can select required measuring tool. Although we recommend to take the print and measure it with the help of Pica Scale. That will give you more quality.

OCR (Optical Character Recognitions)

When client provides the scanned PDF, then we can not save that PDF in text format.

In this condition Adobe provides an application called “Adobe Fine Reader” for extracting the text and graphics.

This application read the text and graphics and give the result on the base of quality of scanned pages. If pages are in very good condition then you will get the text with very less errors.

Fine Reader application is very easy to use. A new person can work on that within only 2 hours.

Exercise: Working with PDFs

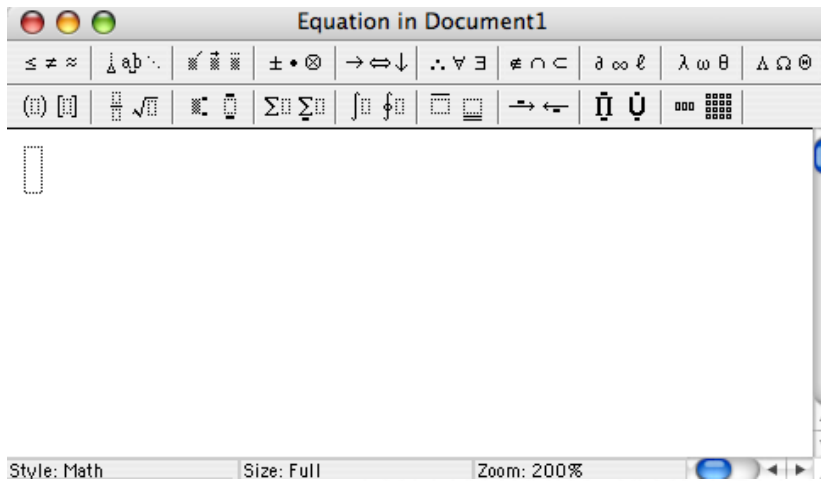
- Q1. What is the different between Editatble/Scan PDFs
- Q2. Can we extract the images from a scan PDF?
- Q3. Use provided PDF and set this in InDesign as it is. You have to extract the text, images and specification from PDF page. Then write down the following:
 - Trim Area
 - Type Area
 - Text Area
 - Specification of all elements coming in PDF.
- Q4. OCR Stands for?

Math Type

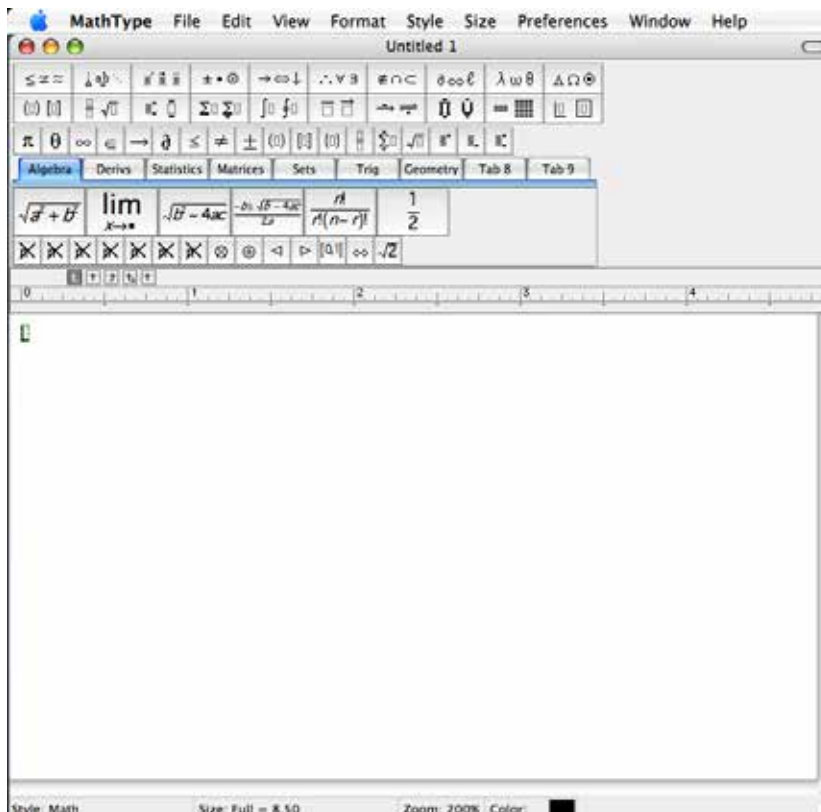
Create Equations

Microsoft provides “Equation Editor” free of the cost. Inbuilt with MS Word. If you have installed complete MS Word then you can find it from following path:

Insert ⇒ **Object** ⇒ **Microsoft Equation**



You can use stand alone application named “Math Type”. This is more advance application for equation.



Now you have to learn this application yourself. Its very easy. All equation format as provided in this. You just need to set the style, spacing and other preferences according to your job requirement.

Exercise: Type Following Equations

Fien krijgt 36 euro zakgeld per maand.

Ze geeft $\frac{2}{9}$ Van deze $\frac{2}{9}$ besteedt ze de helft aan chips.

Dat is $\frac{1}{2}$ van $\frac{2}{9}$. We kunnen dit schrijven als $\frac{1}{2} \cdot \frac{2}{9} = \frac{1 \cdot 2}{2 \cdot 9} = \frac{2}{18} = \frac{1}{9}$

Hoeveel geld geeft Fien dan uit aan chips?

We berekenen dan $\frac{1}{9}$ van 36 schrijven $\frac{1}{9} \cdot 36 = \frac{1 \cdot 36}{9} = \frac{36}{9} = 4$

Hoeveel geld geeft Brent dan uit aan chips?

$\frac{1}{18}$ van 5 of $\frac{1}{18} \cdot 45 = \frac{45}{18} = 2,5$

Typesetting
Template design and formatting

InDesign Basic Tool and Control Palette

Dear Typesetting Professionals

It is pre-assumed that you are not a fresher. You already have basic knowledge of either MS Word, PageMaker or any other application. So in this InDesign Training Book, we will cover only new/necessary features. We will not go in deep of any topic. For that you are supposed to go in InDesign help.

Adobe InDesign is a powerful design and production application. This manual will familiarize participants with basic InDesign techniques including new document construction, how to work with text and pictures, using InDesign tools, palettes, working with Master Pages etc.

How to Create New Documents

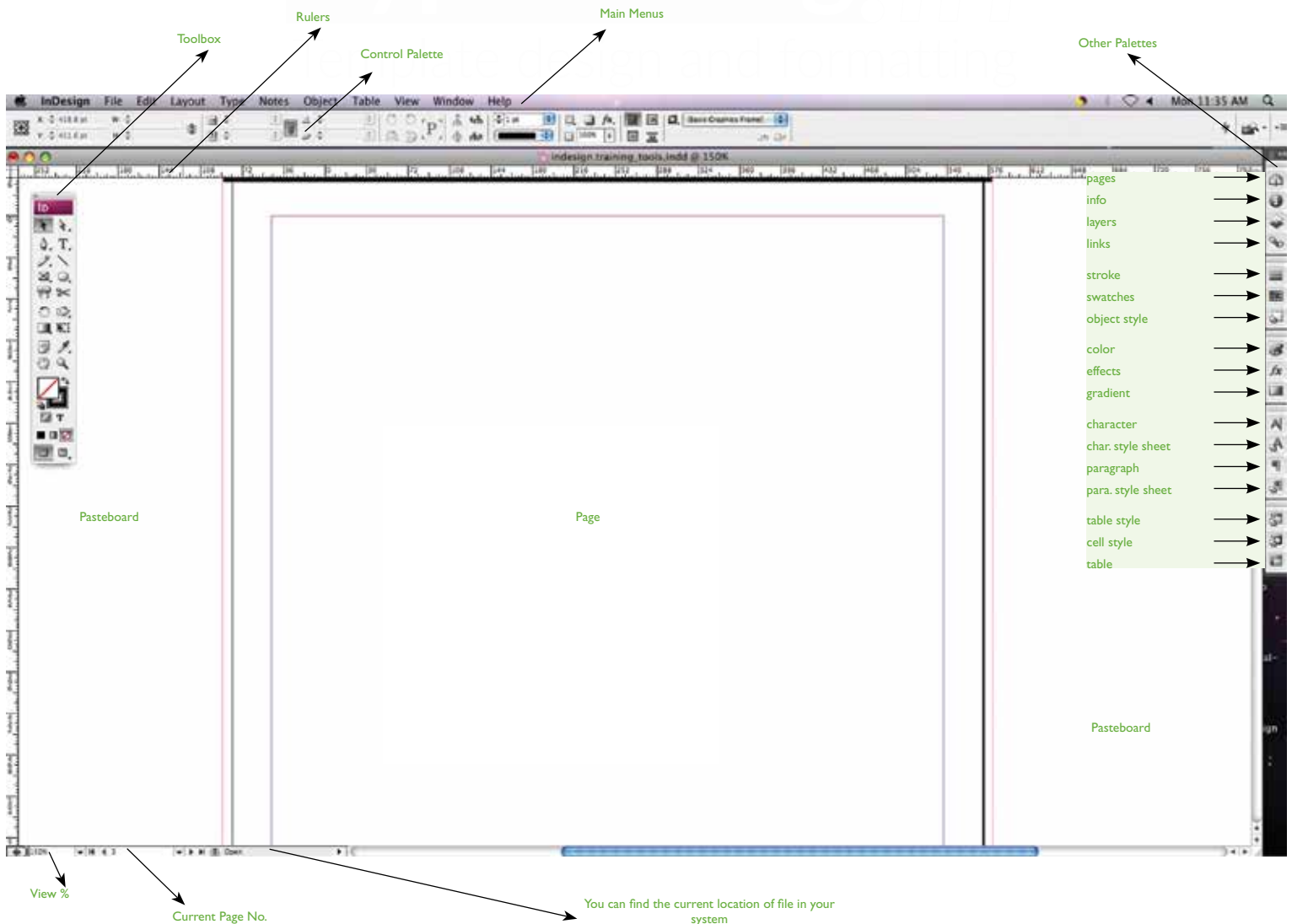
You can create a new document by **File** ⇒ **New** ⇒ **Document**

You have to insert the values according to the requirement of your job. i.e. Type of Book (facing or single page), Trim (Document Size), No of Columns, Margins, Bleed, Slug Area...



The InDesign Main Window (Workspace)

When InDesign opens, the Toolbox, Control palette, and Various palette are showing with page.



Tools

**A Selection tools**

- Selection (V)
- Direct Selection (A)
- Positions (Shift+A)

B Drawing and Type tools

- Pen (P)
- Add Anchor Point
- Delete Anchor Point
- Convert Anchor Point
- Type (T)
- Type On a Path (Shift+T)
- Pencil (N)
- Smooth
- Erase
- Line (L)
- Rectangle Frame (F)
- Ellipse Frame
- Polygon Frame
- Rectangle (M)
- Ellipse (L)
- Polygon
- Button (B)
- Scissors (C)

C Transformation tools

- Rotate (R)
- Scale (S)
- Shear (O)
- Free Transform (E)
- Gradient (G)
- Gradient Feather (Shift+G)

D Modification and Navigation tools

- Note
- Eyedropper (I)
- Measure (K)
- Hand (H)
- Zoom (Z)

By **Selection Tool** we can select the object only, but by **Direct Selection Tool** we can select the content of any object.

Pen Tool : there are four tools inside the pen tool. Used for making shapes. These are almost same as in Photoshop.

Type Tool : there are two type of Type Tool, one is Type Tool and another is Type on a Path Tool.

Pencil Tool : there are three tools inside the pencil tool. One is Pencil Tool second is Smooth Tool and the third is Erase Tool.

Pencil Tool **Smooth Tool** **Erase Tool**

by the help of pencil tool you can draw any curved line
 by the help of Smooth tool you can make any line much smooth
 Erase Tool is working same like eraser but only with line.

Line Tool : to Draw lines.

Rectangle Frame Tool : for placing the image. (in InDesign we can place art directly. We can drag and drop the image)

Rectangle Tool : for creating rectangle, ellipse, polygon

Rotate Tool : for rotating smoothly any object.

Scale Tool : for scaling any object with its content proportional.

Shear Tool : to skew (like 3D effect) the object.

Free Transform Tool : to transform any object.

Eyedropper Tool : this is the same tool as in Photoshop and Illustrator. But in InDesign you can select the desire option which you want to copy from another object. i.e you can copy only font or font size. You can copy color only.

Scale Tool : to count the distance between any to object.

Gradient tool : to make gradient on any fill as well as outline.

Button Tool : to make web page link.

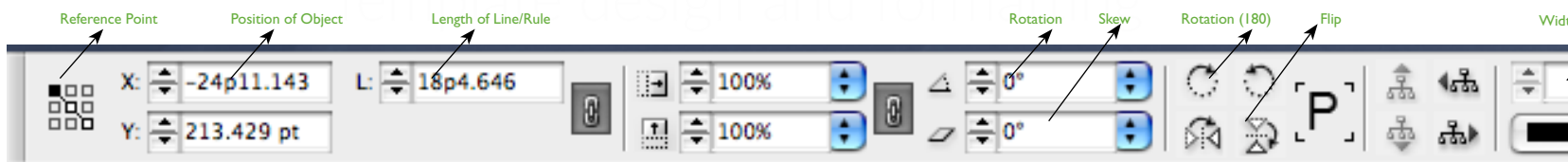
Scissors Tool : to cut any object.

Hand Tool : To drag the page from position to another. This will not change any document layout

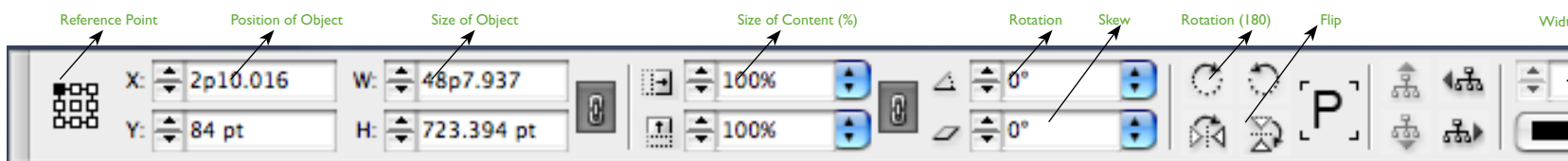
Zoom Tool : To Magnify Text, Object, and Layouts.

Control Palette

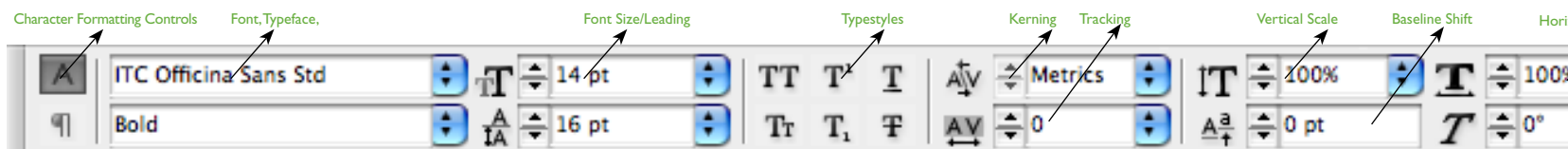
When Line Tool is Selected



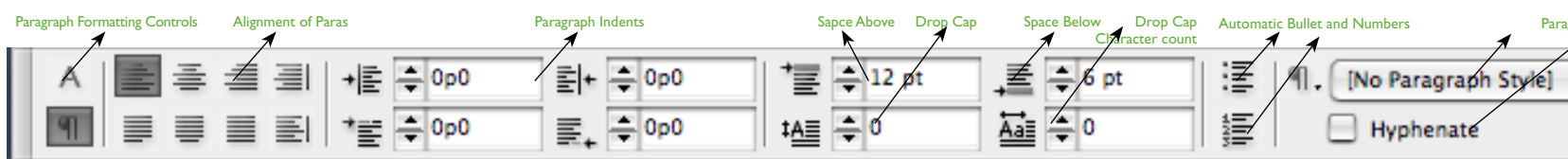
When Picture Box Tool is Selected



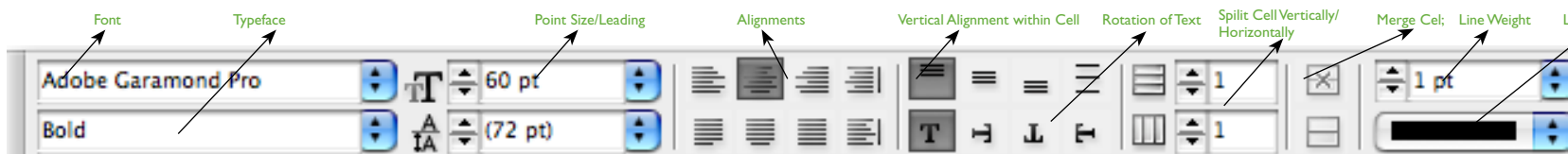
When Text Tool is Selected



When Text Tool is Selected



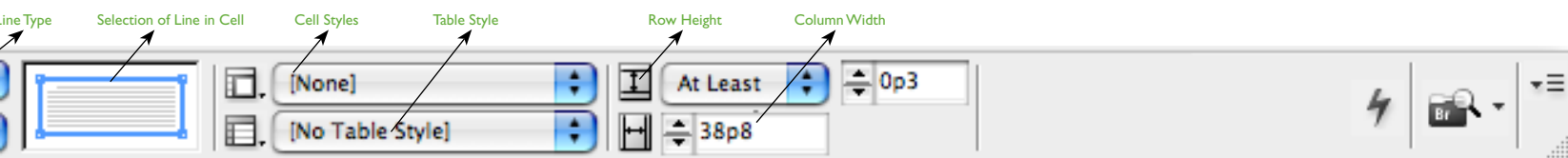
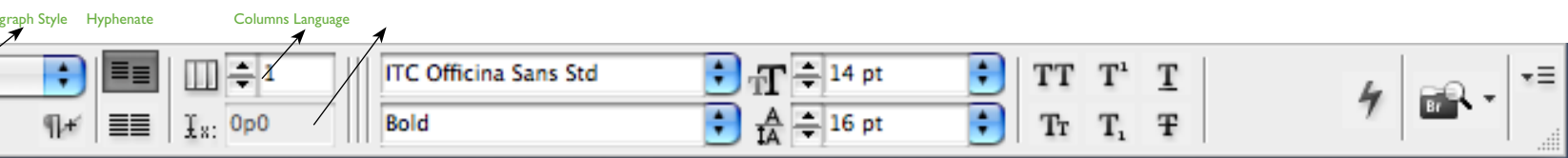
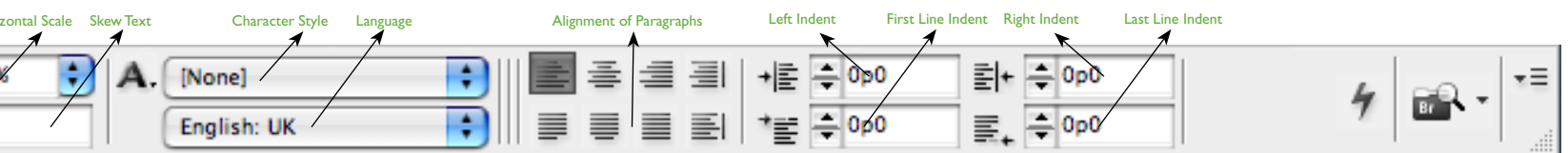
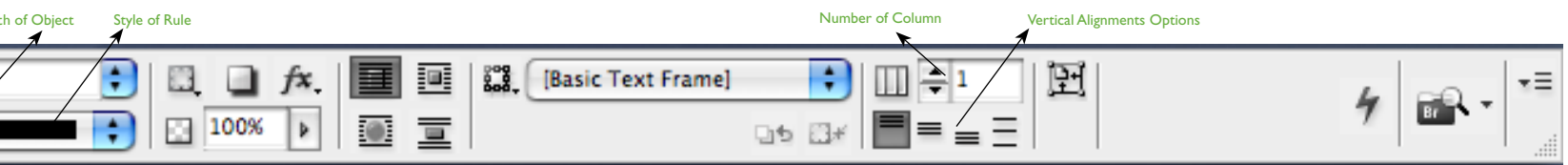
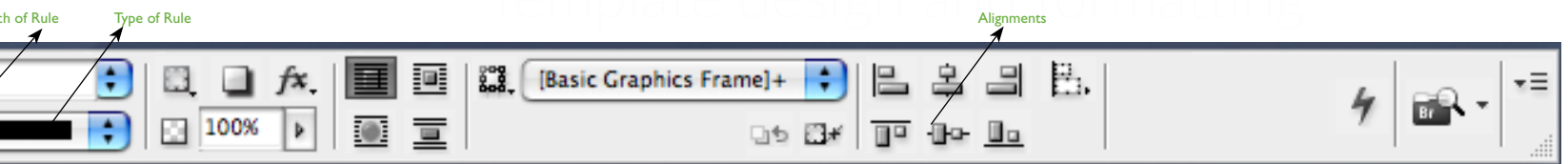
When Text Tool is Selected within Table





Exercise: Fill in the blanks with correct Measurements

1. 1" = 6 P = 72 pt
2. 4p = 3 P6 = 48 pt
3. 24p6 = 294 pt
4. Trim: 6"x9". Margins 3p all side. Then type area will is 30p x 48p
5. Trim: 6"x9". Margins 3p top. 3p bottom and 4p6 inside, 4p outside. Then type area will is 27p6 x 48p
6. Trim: 6"x9". Margins 3p bottom, 4p6 inside, 4p outside. Type Area is 27p6 x 48p. Then top Margin will is 3p



Technical Exercise 1: InDesign Basic Tool and Control Palette

1. Create a new document
2. Leave the default setting for “Number of Pages, Facing Pages, Master Text Frame and the Number field under the Columns heading.
3. Trim: 8” x 11” (Portrait)
4. Margins; top 4p , Bottom 5p, Inside 3p6, Outside 4p6
2. Now Select Type Tool
3. Create the text box of “40p x 2p on document page 1. Position of Box (with left top reference point): X = 3p6, Y = 4p0
4. Design the following

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5. Text should be in 11/14, ITC Officina Sans Book. Keep Bold italic as shown (Cross check it with PDF)
6. Place Image named : Fruits (You have to extract the text and image from PDF)
7. Now Save file with “Day 5-Exercise-your name.indd”. (Please add your name in the filename always)
8. Create the package (**File** ⇒ **Package**) and send it to your tutor.