

SESSION 5 – 1:30–3:00 PM  
WORKSHOP 5-D, FRANKLIN ROOM

# SUNDAY

### **InDesign Essentials: Customized for Personal Historians** ☉

After an orientation regarding the InDesign interface and a brief discussion of InDesign vs Word features, the class will focus on setting up and organizing master pages, styles, and links to work smoothly with Word documents still in revision. Attendees will learn how to set up a placeholder template for client review even before the text is written, how to develop an efficient workflow, and how to apply advanced typographic adjustments to text for a polished look. Decide whether InDesign makes sense for you by understanding the InDesign interface and its key concepts and tools. Learn efficient practices and find out where to go to learn more.



Presenter **cj Madigan** has over twenty years' experience in graphic design and print production. Since 2000, she has focused on digital photo editing and book design. Her firm, Shoebox Scanning & Design in Vero Beach, FL, helps personal historians turn their manuscripts into masterpieces.

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**KEY POINTS:**

1. It's not a matter of Word *or* InDesign. They are meant to be used in tandem. Word is for writing the manuscript. InDesign is for laying out a completed, spell-checked, signed-off document; combining text with graphics, and applying a finer degree of typographic control than is available in Word.
2. Styles are the express lane between a Word manuscript and an InDesign layout.
3. Design and production are two distinct stages of the process, even though you use InDesign in both.
4. An efficient workflow is the major determinant of profitability at this stage.

**WORKFLOW:****PREP**

1. Complete the manuscript – get it spell-checked and signed-off – and put on your designer hat.
2. Get sign-off from client on proposed layout, size, format, binding, and printing process.
3. Review specs with the printer to be sure you've anticipated any design issues, such as bleeds and page imposition.
4. Set up InDesign master pages and styles.
5. Prepare the Word document for placement in Indesign
  - a. apply styles
  - b. remove extra paragraph returns
  - c. set tabs exactly
  - d. name files sequentially and save in "ready to place" folder
6. Prepare and organize all the graphic images – photos, illustrations, other decorative elements.
  - a. crop, tone, and size and optimize in photo editing and/or illustration programs.
  - b. name files sequentially and save in "ready to place" folder

**PLACE**

7. Place the text.
8. Place graphics.

**ADJUST & REFINE**

9. Adjust, refine & fine-tune layout using thumbnails and full page printouts.
10. Create TOC.

**REVIEW CYCLE**

11. Create .pdf copy for review and sign-off.
12. Get consolidated feedback from client reviewer[s] and make any corrections/adjustments.
13. Create .pdf copy for final proofing.

Repeat these two steps according to your work agreement until you get written sign-off to prepare final files for printer.

**PRINT**

14. Make .pdf files and deliver them based on printer's requirements.

**WRAP UP**

15. Archive & backup all project files.
16. Invoice client and deliver final files according to work agreement.

**USEFUL TOOLS**

- styles: paragraph, character & object
- master pages
- thumbnails
- placeholder text
- links palette

**A MEDLEY OF INDESIGN WORKFLOW TIPS**

1. Include file name, version number and print date in a distinctive color on the master page so everyone knows what version they are looking at. Don't forget to remove this when you prepare your files for final output.
2. Use page numbers on your review copies even if you aren't going to use them in the final copy.
3. Use thumbnails on large documents to save paper when printing out for position only. Put them up on the wall and look at the overall flow.
4. Anticipate the longest heading, the longest sidebar, the longest pull-quote and design for these.
5. Learn how to use placeholder text – use this for presenting initial layout to client so they don't get distracted by the words – at this point words are just black – or brown or green or blue – words on the page.
6. Leave notes on the pasteboard to remind yourself of what is left to be done.
7. Name & organize your master pages in hierarchical fashion, so you can see what is based on what.

**WORKING WITH OUTSIDE SERVICES**

- Consider if you can more profitably spend your time servicing clients you already have and/or developing new business.
- Ask subcontractor for a professional discount.
- Have a clear agreement with subcontractor about:
  - » whose client this is.
  - » exactly what the deadline & deliverable is.
  - » Review cycles and what you are expected to provide.
  - » How project creep will be handled.
- Ask what you can do to prepare the manuscript and other materials to make it easier—and less expensive—for the designer to lay out.

**TO LEARN MORE**

Adobe Creative Team. *Adobe InDesign CS3 Classroom in a Book*. (Adobe Press, 2007).  
 ——. *Adobe InDesign CS2 Classroom in a Book*. (Adobe Press, 2005).

Kvern, Olav Martin and David Blatner. *Real World Adobe inDesign CS3*. (Peachpit Press, 2007).  
 ——. *Real World Adobe inDesign CS*. (Peachpit Press, 2004).

Blatner, David and Anne-Marie Concepcion. *Adobe InDesign CS/CS2 Breakthroughs*. (Peachpit Press, 2005).

Kelby, Scott and Terry White. *InDesign CS/CS2 Killer Tips*. (New Riders Press, 2005).

Dabbs, Alistair and Anne-Marie Concepcion, Ken McMahon, Keith Martin. *InDesign Production Cookbook*. (O'Reilly Media, 2005).

*Layers magazine*: The How-To Magazine for Everything Adobe. [www.layersmagazine.com](http://www.layersmagazine.com)

Adobe offers a wealth of tutorials and tips in their design center [www.adobe.com/designcenter](http://www.adobe.com/designcenter).

Next step in self-education is to subscribe to [www.lynda.com](http://www.lynda.com) which has tutorials on just about everything by leading experts in the field.

Check out Anne-Marie Concepcion's website [seneca.design.com/designgeek](http://seneca.design.com/designgeek) and sign up for her free e-newsletter.

Check out the cited publishers' websites as well; they are rich with additional content:  
[www.oreilly.com](http://www.oreilly.com)  
[www.peachpit.com](http://www.peachpit.com)

Google the above-mentioned authors for their web sites, other articles and book.

Check out my web site – [www.shoeboxscanning.biz](http://www.shoeboxscanning.biz) – for additional and updated resources and links.