



Page-Layout Class Topic Outline

For InDesign, QuarkXPress, and PageMaker

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I.D.E.A.S.

Publishing Consultant & Trainer

Authorized Adobe Training Provider for
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Introduction to Publishing (One-Day Class)

If you are new to publishing, you may want to review the topics in this outline.

Determining the type of job

(Brochure, Magazine, Letterhead, etc.)

Determining the purpose of piece

Audience, Image presented, budget, life of piece, due date, distribution

Determining the best page size

Letter, Tri-fold, custom sizes, etc.

Accounting for Trim, Bleeds, and Live Area

Color separation methods

Including single color, spot color, process color, 5-color

Paper selection issues

Including grade, weight, opacity, brightness, texture, and finish

Bindery methods

Including spiral-bound, side-stitch, saddle-stitch, and perfect-bound

Printing methods and Press Types

Including print-on-demand systems, offset printing using direct-to-plate, and the latest direct-to-press systems

Sheet-fed, Web, etc.

Imposition and Signatures

Imposition vs. Bindery method

Special printing methods

Including foil stamping, die cuts, and embossing

Typical publishing workflow

Editorial, Design, Production, Prepress, Print

Edit Galleys, Design Roughs, Approval process

Getting Print Bids

Quantity, Page Size or Folded Size, Sheet Size if appropriate, Page Count,

Bindery method, Paper Weight and Quality, Colors, Turnaround Time

Electronic Issues:

Typical Software workflow

Word Processing, Vector Art, Pixel Art, Page Layout
Industry-Standard Programs for each category

Page Size vs. Document Size

Document Setup

- Setup page size and margins.
- Set up columns or grid.
- Set up master pages.
- Customize color palette.
- Set up paragraph styles for text.

Margins vs. Live Area

Selecting and creating correct Colors

CMYK colors, Spot Colors

Font Issues

Font types, Font Selection

Graphic File

Color mode, resolution, and file format

Acquiring images: Digital Camera, Scanner, Clip Art/Photos

Preflight

Manually and with specialized software

Creating PDFs

Transmitting and transporting files

Macintosh & Windows Cross-platform issues

Fonts

Graphics

Keeping Software Updated

IDEAS Training Modules: Page Layout-Basic

Program Code: ID=InDesign, QXP=QuarkXPress, PM=PageMaker
(FrameMaker has its own outline)

What Page Layout is

Where items are arranged on a page

Three items that make up a page

Text (frames), Image (frames), and Rules

File Management

Save

Save As

Save A Copy

Native File Formats

Templates

New Documents

Page Setup

Page Size

Margins

Double Sided/Facing Pages

Auto/Master-Text Frame (ID, QXP)

Bleed Guides (ID, QXD)

Slug Area (ID)

Work Area

Pasteboard area

Global (ID, QXP) vs. Individual Pasteboards (PM)

Menus

Rulers

Scroll Bars

Page Icons

Basic Palettes

Color

Styles

Layers

Master Pages

Saving Palette Workspace (ID, QXD)

Tool Box (Double-Click on Tool for Options)

Selection Tool(s)

Text-Editing Tool

Text & Picture Frame Tool(s)

Basic Shapes Tool(s)

Line/Rule Tools(s)

Pen Tool(s) (ID, QXP)

Crop Tool(s)

Hand/Zoom Tools

Rotation Tool(s)

Scale Tool(s)

Free Transform (ID)

Shear

Setting Preferences

- Preference settings review

- For all new documents

- For single document only

Moving Around

- Zooming/Scrolling

- Grabber Hand / Scroll Bars

- Menu / Keyboard

- Magnifying Glass

- Navigator Palette

- Moving Page-to-Page

- Document Palette

- Other methods

Undos

- Single (PM) vs. Multiple (ID, QXP)

Rulers, Guides, Columns & Grids

- Ruler Zero point

- Creating Guides lines

- Locking Guides

- Ruler Guides vs. Column Guides (ID)

- Hiding Guides

- Per-View Guide Lines

- Coloring Individual Guides (ID)

- Manual vs. Numeric Guides

- Creating & Adjusting Columns

- Single pages vs. spreads

- Asymmetrical columns (PM, ID)

- Grids

- Editing grids

- Snap to grid

Rules

- Drawing rules

- Adjusting Size & Style

- Creating new Sizes and Styles

- Coloring Rules

- Frame Borders

- Paragraph Rules

Duplicating Objects

- Copy &...

- Paste

- Paste in Position

- Drag duplication

Stacking Order

- Arrange menu

- Paste in Front/Back

Groups

- When to use the Group/Ungroup

- Creating Groups within Groups

Master Page/Document Layout Palette

Creating Master Pages

Single Pages

2-Page Spreads

Naming Master Pages

Applying Master Pages

Duplicating Master Pages

Overriding Master Page elements

Page-Numbering

Auto-Numbering

Printing Options

with or w/o Graphics

Color as solids or gray

Crop/Registration Marks

Page Range

File Export

Adobe Acrobat PDF

Editing Default PDF Settings

Preflight (PM, ID)

Collect for Service Bureaus/Package

IDEAS Training Modules: Type-Basic

Text Entry and Edits

Terminology Note: InDesign uses the term "Frames or Objects", QuarkXPress uses the term "Items", and PageMaker uses the term "Blocks"—but they all refer to the same concept/function. The term "Frame" is used here.

Creating Text Frames

Multi-Column Text

- Multi-column Text Frame

- Linking multiple Text Frames

- Un-linking multiple Text Frames

Master-page Text Frames

Editing Text Frames

- Resizing Text Frames

- Change to Text Frame from another Frame (ID, QXP)

- Using/Setting Text Inset

- Coloring Frames

 - Fills and Strokes

- Using/Setting Text Wrap/Runaround

 - Types of Runaround

 - Frames/Item

 - Manual-Image

Text Entry

- Direct Input

- Importing Text

 - From File, Copy & Paste, Drag & Drop

 - Linking to original text file (PM, ID)

 - Importing without formatting

 - Using Auto-flow options

- Using Place-holder text (ID, QXP)

Editing Text

- Directly in Layout

- In Text Editor (ID, PM)

- Text Selection

 - Word Only, Line Only, Paragraph Only, Entire Story

 - Custom Selection

- Spell Check

 - Selection Only, Story Only, Document, All Open Documents

- Special Characters

 - Line Breaks

 - Non-Breaking Space/Hyphen

 - Others

 - How to insert special characters

 - Via Mouse (Control-click or right-click)

 - Via system utility

 - Via Glyph palette (ID, QXP7)

- Search & Replace/Find & Change

 - Text Only

- Changing Case

Type Specification

Character Settings

Font

Font Categories

Serif, Sans Serif, Headline, Decorative, Script, Pi/Dingbat

Changing Font by Menu, Palette, or Keyboard command

Styles

Bold/Italic

Caps/Small Caps

Super/Sub Script, Superior

Others

Changing Style by Menu, Palette, or Keyboard command

Size

Changing Size by Menu, Palette, or Keyboard command

Line Spacing/Leading (may be under Paragraph settings)

Auto (Typographic Preferences)

Absolute

Incremental (QXP)

Changing Leading by Menu, Palette, or Keyboard command

Scaling

Changing Leading by Menu, Palette, or Keyboard command

True Condensed & Expanded fonts vs. artificial scaling

Type Color

By Menu, Palette

Coloring Type Fill and Stroke

Paragraph Settings

Alignment

Left, Right, Center, Left Justified

Indents

Left, First Line, Right

Paragraph Space

Above, Below

Hyphenation Settings

Word length

Before and After settings

Hyphen limits

Drop Caps

Characters across and Lines down

Tabs

Types: Left, center, right, decimal, custom

Creating

Adjusting

Using leader dots/characters

Style Sheets

Paragraph

Review applicable settings

How to create Paragraph Styles

By Menu/Palette settings

By Example

Editing Paragraph Styles

Editing, deleting, or replacing Styles

Applying Styles

Removing local formatting

Tables

Creating New Tables

Editing Tables

Adjusting Size

Adjusting Color for Fills & Strokes

IDEAS Training Modules: Color-Basic

Color Types:

Type vs. method of output

Spot

Special Spot uses

Duotone

Tritone

Metallic

Fluorescent

Varnish

Process

AKA: 4/C, CMYK

Tint

Can be either Spot or Process

Creating New Colors

Via Palette and menu

Global Swatch Colors

Using Color Libraries

New Color Notes

Never pick colors from monitor for print work

Colors may dither if for web work

Never pick process colors from spot-color swatch book

Use Pantone Process, TruMatch, FocalTone, etc.

Use a standardized color-naming system with process book

Applying Colors

Methods

Color/Swatch Palette

Toolbar (if applicable)

Eyedropper/Paint Bucket (if applicable)

Boxes/Frames

Rules/Borders/-strokes

Type

Editing Colors

Changing the Color percentage/tint

Deleting and Replacing Colors

Use "Remove Unused Colors" (ID)

Deleting used colors

Replacing the color (if applicable)

IDEAS Training Modules: Graphics-Basics

Creating Picture Frames (if appropriate)

Types of Frames

- Changing Frame type

- Changing Frame shape

- Coloring Frames

- Fills and Strokes

Importing Pictures

- Copy&Paste vs. Import

- Use the Place/Import menu

- Exception: Illustrator files into InDesign

Editing Graphics

Cropping

- Sizing Graphics to Frame

- Sizing Frame to Graphics

Re-sizing via:

- Tools

- Double-Click Tools

- Transform menu

- Transform palette

Managing Graphic Links

- With Link/Picture Palette

- During Opening of File

- Imbedding Linked Files

- Placing Native File Formats

Adjusting Proxy Views

- Via Preferences

- Via Per-Image Setting (ID, QXP)

Using/Setting Text Wrap/Runaround

- Types of Runaround

- Frames/Item

- Auto-Image

Graphic Types

Raster-Based

- Photoshop-type files

- Scanned images, Digital cameras, Original creations

Vector

- Illustrator/FreeHand/CorelDRAW-type files

Raster Graphic Modes

Line Art/Bitmapped Mode

- Can be colored any SINGLE color in DTP programs

- Scanned line art can be transformed into vector-based art

Grayscale

- Can be colored any SINGLE color in DTP programs

- Do not use Halftone if available

Color

- RGB vs, CMYK

Vector Graphic's can be black-only, grayscale, or color—but are treated as a single mode

Graphic Formats

Native Formats (desired format whenever possible)

Some Native formats can be placed directly in another program

Even if required to export to another format, be sure to keep a native format version for later edits (if appropriate).

PSD (Photoshop)

InDesign import PSD and supports transparency and layer control

ID supports spot colors in PSD files too

QuarkXPress imports PSD and supports layer control

QXP7 adds supports transparency

PageMaker imports PSD, but no transparency

AI (Illustrator)

InDesign imports AI and supports transparency

Print-Oriented Formats

TIFF

Most common format for non-native raster images

Can use non-lossy LZW compression

Can be saved as layered TIFF for ease of editing

Using Alpha-Channels for Transparency (ID, QXP7)

EPS

Usually, used only for Duotones in older programs

DCS2

Usually, used only for Duotones in older programs

Avoid

JPEG, BMP, WMF

Vector-Oriented Formats

EPS or PDF

Mixed Pixel/Vector Formats

PDF

PDFs exported as 1.4 or higher from Adobe programs may contain transparency

ID can control layers from PDFs saved as 1.5 or higher

Resolution

Concept of resolution and pixels

PPI (incorrectly called, DPI)

Resolution vs. File Size

Final size is what matters

Resolution requirements (all at final size)

Print

Line art

600-1200 ppi

Grayscale and Color:

Line Screen (LPI) vs. Resolution (PPI)

1.5 method

Example: 150 LPI x 1.5 = 225 PPI

IDEAS Training Modules: Page Layout-Adv.

Pen tool techniques

- Drawing lines and curves
- Editing paths
- Simplifying Paths

Layer Palette

- Layers vs. Stacking order
- Creating Layers
 - Layer Options
- Working with layers
 - Layer Organization
 - Moving objects from layer-to-layer
 - Hiding Layers/Non-Printing Layers
 - Locking Layers
 - Selecting Objects on Layer(s)
 - Copying & Pasting Layers

Duplicating Objects

- Step & Repeat
- Layer duplication

Master Page/Document Layout Palette

- Creating Master Pages
 - Multi-Page Spreads
- Duplicating Master Pages
 - Based-On Parent/Child Masters (ID)
- Applying Master Pages
 - Applying different Masters to spread
- Page-Numbering
 - Auto-Numbering within document
 - Section
 - Numbering
 - Naming

Creating Templates

- Page Setup
- Preferences
- Master Pages
 - Creating a Grid
- Style Sheets
- File Info

Transforming elements

- Via Toolbar, Menu, Palette
- Rotating
- Shearing

Image Libraries

- Creating & Using
- Organizing
- Snippets (ID)

Align & Distribute Usage

View

- Multi-view (ID, QXP7)

- Preview Mode (if applicable)

- High Res Preview (ID, QXP7)

- Overprint Preview (if applicable)

Object Styles (ID)

- Creating & Using

Printing

- Printer Styles

File Export/Conversion

- Adobe Acrobat PDF

 - Custom PDF Settings

- HTML (if applicable)

- Exchange with older versions

Special Topics

Long Document Features (upon request for custom classes*)

- Books—Creating

- Footnotes

- Table Of Contents

 - Creating automatic hyperlinks and bookmarks in PDFs

- Index

 - Creating automatic hyperlinks in PDFs

- Review of Anchored Text, Graphics, and Table options

Sharing Content (upon request for custom classes*)

- InCopy Usage (ID)

- Composition Zones (QXP7)

Hypermedia Documents (ID—upon request for custom classes*)

- Importing Movies & Sounds

- Creating Buttons

- Creating Hyperlinks

- Exporting to PDF

Using Version Cue (ID—upon request for custom classes*)

- Setting up projects

- Checking in/out files

- Creating archive versions

**More time may be required or other topics cut out*

IDEAS Training Modules: Type-Advanced

Text Entry and Edits

Terminology Note: InDesign uses the term "Frames and Objects", QuarkXPress uses the term "Items and Boxes", and PageMaker uses the term "Blocks"—but they all refer to the same concept/function. The term "Frame" is used here.

Managing Fonts

- How to Avoid Missing Fonts

 - Warning Signs

 - Opening Warning Dialog Box

 - Grayed-out or modified Menu; Pink type highlight

 - Courier font substitution during printing

- Benefits of Using OpenType (ID, QXP7)

 - Extended Characters in single font (Pro fonts only)

 - Cross-platform format

 - No screen fonts or font metrics file required

Editing Text Frames

- Applying Special Frame Strokes/Borders

 - Editing Borders

 - Special Corners Settings

Text Entry

- Importing Text

 - Importing with Styles

 - Using, Creating, and Applying Styles in MS Word for Editors

 - Advanced style import options (ID)

 - Using Coding Tags in ASCII Text files*

 - Importing Text from a database*

 - (upon request for custom classes)*

Editing Text

- Search & Replace/Find & Change

 - w/ Attributes

 - w/ Styles

 - Invisible/Special Characters

 - Using Story Editor (ID, PM)

Baseline Grid

- When to use

- Setting

 - Globally (ID, QXP)

 - Per Frame (ID)

- Applying grid

Type Specification

- Character Settings

 - Tracking/Kerning

 - Difference between Tracking & Kerning

 - Manually vs. Automatically

 - Metric (built-in)

 - Optical (ID)

 - Tracking and Kerning Table Edit (QXP)

 - w/ Style Sheets

 - Changing Leading by Menu, Palette, or Keyboard command

- Baseline Shift
 - Changing Leading by Menu, Palette, or Keyboard command
- Paragraph Settings
 - Justification Settings
 - Glyph, Character & Word Spacing
 - Punctuation Settings
 - Hanging Punctuation (if available)
 - Paragraph rules
 - Creating/Adjusting
 - Combining Above & Below
 - Bullet and Number Lists (ID)
 - Creating/Adjusting Indents
 - Defining custom bullets or number options
 - Dealing with “interrupted” number lists
- Style Sheets
 - Types
 - Paragraph
 - How to create Paragraph Styles
 - By Menu/Palette settings
 - By Example
 - Editing Paragraph Styles
 - Redefining existing styles (ID)
 - Using Based On and Next Paragraph settings
 - Character (ID, QXP)
 - Review applicable settings
 - How to create Character Styles
 - By Menu/Palette settings
 - By Example
 - Editing Character Styles
 - Using Based On settings
 - Applying Styles
 - Keeping local formatting
 - Removing local formatting only (ID)
 - Removing local formatting and character styles (ID, QXP)
 - Creating and using Nested Styles (ID)
 - Applying Based-on styles automatically
 - During Text Entry
 - Using Next Style settings (ID)
 - Using Object Styles (ID)
 - Anchored Text Boxes
 - Uses
 - Creating
 - Positioning
 - Editing
 - Text as an effect
 - Type on a Path
 - Type-on-Path Options

Tables

- Importing Tables from MS Word (ID) or Excel (ID, QXP)

 - Removing Formatting

 - Linking to original file

 - QXP with Excel

 - InDesign (with/without plug-in)

- Converting

 - Tabbed Text to Table

 - Table to Tabbed-Text

- Editing Tables

 - Adjusting Size

 - Overall size vs. Inner columns

 - Adjusting Color for Fills & Strokes

 - Adjusting Text Cell Settings

 - Using Anchored Tables (QXP)

- Creating Table and Cell Styles (ID)

 - With third-party plug-in

IDEAS Training Modules: Color-Adv

Editing Colors

- Changing the Color mode
 - Checking for proper output
 - Via the Color Palette
 - During printing
- Changing the Color type
 - Changing to/from spot and process color

Imported Colors

- From another file (same program)
- From placed/imported files (if applicable)
 - Spot color name will import with graphics
 - Never edit the name or color percentages
 - Editing color mode

Special Techniques

- Gradient Tints
 - Creating Gradient Tints
 - Process vs. spot color
 - Editing Gradient Tints
 - Saving Gradient Tint swatches (if applicable)
- Applying Gradients
 - To Fills
 - To Strokes
 - To Text

Spot Colors

- Creating mixed inks
 - Spot with spot
 - Spot with process
- Dealing with spot-color output
 - Converting to process
 - Combining spots together

Color Management System (CMS)

- General Description and purpose
- Creating Profiles
 - Monitor
 - Final Output (Press)
 - Proofer
 - Scanner
- Applying Profiles
 - Changing settings on multiple programs
- CMS Settings

Trapping (optional)

Definitions

- Press trapping vs. Color trapping
 - Color trapping is also a press problem
- Overlap of colors
 - Prevents paper gaps between colors

Basic Theory

- Light colors expand into darker colors
 - Light color on top of dark color
 - Light color “spreads” into darker color
 - Dark color on top of light color
 - Light color “shrinks” into dark color

User-applied trapping

- “Automated” Trapping
 - Illustrator with Pathfinder Palette
- Stroke trapping
 - Illustrator, FreeHand, InDesign, PageMaker
- Color Overprint
 - Quark, InDesign
- Stroke Trapping Tips
 - Trap in actual/final size
 - Overprint stroke is only half of rule width in EPS art programs
 - Convert large text to paths and stroke
 - Cannot edit imported graphics in DTP program
 - Check with printer for amount of trap needed

Program-applied trapping

- QuarkXPress and PageMaker
 - Traps only program’s own elements, not imported graphics
 - Watch out for indeterminate colors
- InDesign
 - Traps with per-page settings
- Trapping Tips
 - Trap important items individually to be safe
 - Check with printer for amount of trap needed

Prepress applied

- Vendor based
 - Ex: Adobe RIP, traps entire page, graphics and all

IDEAS Training Modules: Graphics-Adv.

Creating Picture Frames

- Frames vs. Masking and Keylines
 - Applying Special Frame Strokes/Borders
 - Editing Borders
 - Special Corners with Pathfinder (ID)
- Compounds and Masks

Paste-Into

Pathfinder (ID) and Merge (QXP) Effects

Managing Graphics

- Using Adobe Bridge (ID) or third-party program

Editing Graphics

- Coloring contents and graphic boxes
 - Grayscale graphics
 - Monochrome graphics

Using/Setting Text Wrap/Runaround

- Types of Runaround
 - Auto-Image
 - Clipping Path
 - Alpha Channel
 - Auto-detect
 - Manual-Image

Anchored Graphics Boxes

- Uses, Creating, Positioning, Editing

Text as an effect

- Creating Text Outlines/Paths
- Editing Outlines/Paths
- Applying Special Effects to Outlines/Paths

Layer Control for imported graphics

- Photoshop (ID, QXP)
- PDF (ID)

Special Effects

- Drop Shadows (ID, QXP7)
- Feathering (ID, QXP7 with alpha channel)
- Transparency
 - Changing Opacity (ID, QXP7)
 - Blend Modes (ID)
- Building Transparent Documents properly
- Flattener Preview

Picture Effects (QXP)

Separation Preview

- (ID, Acrobat Pro for QXP)