



InDesign Report

Updated by Elizabeth, 8/21/2017

Before you begin.	4
Part 1: Document setup	5
Part 2: Master pages.	6
Part 3: Assigning master pages.	7
Part 4: Page numbering	8
Part 5: Section titles	10
Part 6: Table of Contents	12
Part 7: Exporting the report	14

Adobe InDesign Orientations

Before you begin

1. Ask the teacher if they would like any of the following:
 - Which body pages they would like (ex: Introduction, Methods, etc.)
 - Headers or footers
 - Table of Figures page
 - References page
2. Explain to students that the orientation will make a good template for their projects—they will simply insert their content into the format we're going to create.
3. Ask students to open InDesign and follow along.

Part 1: Document Setup

1 Set units and increments


1. Go to Edit > Preferences > Units & Increments to open a preferences dialog box.
2. Change the Horizontal and Vertical Ruler Units to “Inches.”
3. Click OK.
4. Change your workspace to Advanced.

2 Create a new document

1. Go to File > New > Document.
2. Change the Number of Pages to 7.
3. Set Page Size to Letter.
4. Set all Margins to 0.5 in.
5. Click the chain icon to unlink the margins if you need to change one margin. The chain icon should “break.”
6. Click OK.



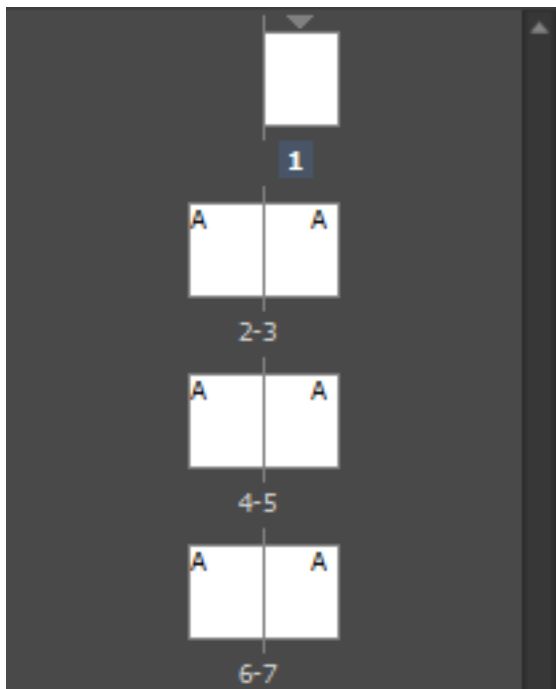
1 Master Page A: Headings

1. Explain the difference between regular pages and master pages. 
 2. On the right side of the screen, click the Pages panel.
 3. Right click on one of the two “A-Master” pages.
 4. Select “Delete Master Page.”
 5. Click OK when the error message appears. You will now have one A-Master page.
 6. Right click on “A-Master.”
 7. Select “Master Options for A-Master.” A “Master Options” dialog box will appear.
 8. Change the Name to “Headings”
 9. Click OK.
- Master pages allow you to create templates and assign those templates to the pages of your document.
 - Master pages won’t appear in your exported or printed versions of the document.
 - When you assign a master page to a regular page, anything on the master page will appear on the regular page.
 - Only put content on master pages that you want to appear on multiple pages, such as (running) headers or footers and page numbers.

Part 3: Assigning Master Pages

1 Assign Master Pages to Pages

1. In the Pages panel, click and drag the master page titled [None] to page 1.
2. A-Headings should be applied to the rest of the pages, 2 - 7.



1 Page Numbers and Headers: TOC

1. Double-click into the A-Headings master page.
2. On the left side of the screen, select the Type Tool from the toolbar.
3. Click and drag from the upper-right corner of the margin to create a **0.5 X 0.5 inch** textbox. *See screenshot below.*
4. Go to Type > Insert Special Characters > Markers > Current Page Number.



5. In the text box, highlight the "B."
6. In the control panel at the top of the screen, click the right-align button.
7. Draw another text box from the top left corner to the bottom left of the page number text box on the right. *See screenshot below.*
8. In the new text box, type "Title of Report".

The letter "B" should appear in the box and will be left aligned.



Part 4: Page Numbering

2 Set up front matter numbering

1. Click on Page 2 in the Pages panel.
2. Go to Layout > Numbering and Section Options to open a “Numbering & Section Options” dialog box.
3. Select “Start Section Numbering at Page”
2.
4. Change the Page Numbering Style from Arabic numerals to lowercase roman numerals.
5. Click OK.

Page 2 should change to Roman numeral ii in the Pages panel.

3 Set up body matter numbering

1. Click on Page 4 (iv) in the Pages panel.
2. Go to Layout > Numbering and Section Options to open a “Numbering & Section Options” dialog box.
3. Select “Start Section Numbering at Page”
1.
4. Change the Page Numbering Style from lowercase Roman numerals to single Arabic numerals.
5. Click OK.
6. Click OK out of the dialogue box that pops up.

All the pages after page 4 should have Arabic numerals underneath them in the Pages panel. Pages 1 through 6 should have lowercase Roman numerals underneath them in the Pages panel.

1 New Paragraph Style: Heading

1. On the right side of the screen, click the Paragraph Styles panel.
2. In the top right corner of the Paragraph Styles panel, click the Panel Box Menu.
3. Create a new paragraph style named “Heading.”
4. In the menu on the left, select Basic Character Formats.
5. Change the Font Family to Arial.
6. Change the Size to **16 pt.**
7. Click OK.

2 New Paragraph Style: Subheading

1. On the right side of the screen, click the Paragraph Styles panel to create another new paragraph style.
2. Name the style “Subheading.”
3. In Basic Character Formats, change the Font Family to Arial and the Size to **13 pt.**
4. Click OK.

3 New Paragraph Style: TOC

1. Create another new paragraph style, this time titled “Table of Contents.”
2. Change the Font Family to Arial and the size to **16 pt.**
3. Click OK.

Part 5: Section Titles

4 Add section headings

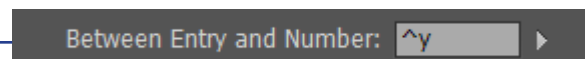
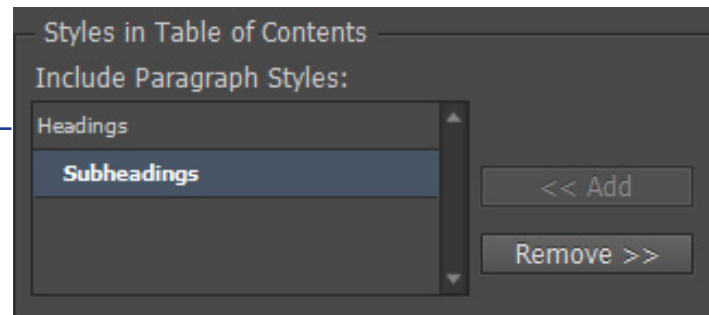
1. In the Pages panel, double-click into page ii.
2. Select the Type tool.
3. In the upper-left corner of page ii, draw a text box and type “Table of Contents”.
4. Select “Table of Contents,” and in the Paragraph Styles panel, select the “Table of Contents” paragraph style.
5. Create more heading text boxes, this time using the “Heading” style:
 - Abstract, page iii
 - Introduction, page 1
 - Methods, page 2
 - Results, page 3
 - Discussion/Conclusions, page 4

5 Add section subheadings

1. Create a text box that spans the rest of the page underneath the heading “Discussion/Conclusions”.
2. Go to Type > Insert with Placeholder Text.
3. Place your cursor after the first word of the placeholder text and hit Enter on your keyboard.
4. Highlight the first word and in the Paragraph Styles panel, select the “Subheading” style.

1 Set up table of contents

1. Click to roman numeral Page **ii** in the Pages Panel. **This is our Table of Contents page**
2. Go to Layout > Table of Contents.
3. Delete the word “Contents” from the Title section.
4. In the Other Styles menu, select “Headings” and click “Add.”
5. Next, select “Subheadings” and click “Add.”
6. On the right of the dialogue box, click “More Options.”
7. Select “Heading” from beneath “Include Paragraph Styles.”
8. Under the “Style: Heading” section, click in the “Between entry and number” field.
9. Delete “^t”.
10. Click the arrow to the right of where “^t” was.
11. Select “right indent tab.”
The “Between entry and number” will now be “^y”.
12. Repeat steps 8 - 10, this time with “Subheadings” selected from beneath “Include Paragraph Styles.”
13. Click OK. **Your cursor should be loaded with text.**
14. Click No for the dialog box that pops up.
15. Click into the top right corner of the page to drop the text there.



Part 6: Table of Contents

2 Make a style for TOC text

1. Open the Paragraph Style panel.
2. In the top right corner of the Paragraph Styles panel, click the Panel Box Menu.
3. Select “New Paragraph Style.”
4. Change the Name to “TOC text.”
5. Select Based On “No paragraph style.”
6. Click “Reset to base.”
7. In the menu on the left, select Tabs.
8. Double click the right justified arrow.
9. Click and drag the lower ruler so you can see the **8 in.** mark.
10. Click above the **7.45 in.** mark in the gray bar above the ruler.
The right justified arrow should appear.
11. In the Leader field, type a space, a period, and another space (“ . ”).
12. Click OK.



1 Export documents as a PDF

1. Go to File > Export to open an “Export” dialog box.
2. Change the File Name to the title of the manual.
3. Make sure that Save As Type is set to Adobe PDF (Interactive) (*.pdf).
4. Click Save. An “Export Adobe PDF” dialog box will replace the “Export” dialog box.
5. Change from Spreads to Pages.
6. Click OK. The “Export Adobe PDF” dialog box will close. The PDF version of the document should open shortly after.

- Explain to students that printing directly from InDesign does not work.
- Export their .INDD file to a .PDF file before printing.
- Keep an .INDD file so they can continue editing and working on their file.