Basic InDesign 4-fold Brochure

Option 1: (accordion fold; barrel fold; gate fold; parallel fold)
1. Set up Document (for a 4-fold brochure)
File>new
Pop-up menu will appear:
Intent: print
Number of pages: 8
Uncheck facing pages (this is used for magazine and book layout)
Width: 5 inches
Height: 5 inches
Columns: 1
Click more options
Bleed and slug: Ignore the bleed and slug as you can adjust these later. Most printers require 9-16 pt. or .125-.250 inch bleed.
Click OK

At any point you can change these settings:
File>Document Setup

In order to change the pages to a brochure format, go to the pages panel situated on the right hand side of the screen (in the dock). If it is not visible: *window>pages*. Click on the pages menu, which is situated on the top right hand side of the pages panel. Scroll down to *allow document pages to shuffle* and uncheck it. This will allow you to move the pages into the desired brochure configuration, which you can do in the pages panel.

Any panel that has to fold into the brochure needs to be slightly smaller than the outer panels. To change the interior panels use the third tool down from the top on the tool panel: *page tool* (shift + P on mac) and click on the page you need to change. It will light up and the control bar will change (if the control panel is hidden, choose: *window>workspace>advanced*). You can adjust the interior widths to decrease by .175 inches (e.g. 5 inches for outer gate fold and 4.875 for inner gate fold), make sure the correct *reference points* are indicated. The reference points you choose are the ones that you want to have remaining stationary. The outer pages of the brochure do not have to have their pages adjusted. In the control panel you will manually type in the new width e.g. W: 4.875.

Option 2: ("Saddle stitched" booklet, which is actually stapled)
1. Set up Document (8 pages)
File>new
Pop-up menu will appear:
Intent: print
Number of pages: 8
Check facing pages (this is what is also used for magazine and book layout)
Page size: 5" x 5"
Orientation: landscape

Columns: 1
Click more options
Bleed and slug: you can set any bleeds that you want to .175-.250 of an inch. Or you can leave this and do it later.
Click OK

2. InDesign Layout Scheme

Like Adobe Photoshop and Adobe Illustrator, the tool bar is situated to the left of the working space, the panels (or palettes) are located on the right, and the control panel is situated above. Above the control panel is the fixed menu panel. The most used panels are the pages panel that allows you to insert and reorder pages, as well as change elements of the master pages. The other most used panels are the color, character, stroke, and paragraph panels. The control panel shows options for the components you have selected. Hover your cursor over any of the tools and the name of that tool will appear.

3. Importing Text/Images

File>place
Or
Choose the rectangle tool and click*: control + d*
Or
File>open

To adjust the imported image:
Object>fitting (and a pop-up menu will appear with options)
Check out the other options under *object* in the menu to see how you can further adjust the image.

Images appear to be within the InDesign document, however they are merely linked. You can control this through the link panel in the panel dock, or activate: *window>links*. This is important if you take this to a printer, as you will have to add the image files with the InDesign file when you hand the files over. Otherwise, you can save as a PDF (*file>export*). InDesign will package the images for you in the PDF. If you move images to other folders or alter them you will get an alert in your links panel. The icons at the bottom of the panel allow you to relink or to edit an image if the images need altering.

Images and their frames can be manipulated separately. Images can be moved within their frames by double clicking on the image or clicking on the donut icon in the center. To manipulate the frame select closer to the frame itself. You can also import several images at the same time by control clicking as you select. InDesign will allow you to drop the images independently or you can create a grid with the images. To create a grid choose the up arrow to create rows (the down arrow to subtract) and the right pointing arrow to create columns (the left pointing arrow to subtract) while your hand is still on the mouse with the cursor loaded with the images. When you let go of the mouse, the images will be loaded into the grid.

When you are placing files from an illustrator file that has several artboards, make sure you check the *show import options* box in the *place* pop window. A new pop-up box will appear that will allow you to select images from specific artboards within the file.

If you have more text than can fit into one frame and you want InDesign to automatically create multiple text frames, hold down the *shift* key along with *control +d* to import the text.

4. Text
Importing text is done in a similar way to importing images. Choose the rectangle tool and click*: control + d.* If you have a large amount of text and you wish for InDesign to create the textboxes and extra pages for you, hold down the shift key when you import the text.

Text can be managed with the type tool and the control panel (above the working area), as well as the character, paragraph, stroke and color panels (to the right of the working area, the panels can be activated through the *window* menu if they are not visible) once the text is selected. Like Illustrator you can create text on a path with the type tool and modify it with *type>type on a path>options*.

Text wrap is more simply managed through the image. Click on the image within the frame in front of the text, and then choose *window>text* wrap. A pop-up window will appear from which you can select your desired options. You can also manage text wrap with the text selected and then by clicking on the text wrap panel and choosing one of the options under *type*.

To position text in front of an image, select your text and choose: *object>arrange>bring to front*. If you have already used a text wrap on an image behind the text you can counteract it by selecting the text in front and select and choose: *Object> text frame options>ignore text wrap*.

Text threading is used when you want your text to flow from one frame to another. You have to use the selection tool. Once you select your text box with the selection tool you will notice a square box on the upper left hand side (the in port) and another on the lower right hand side (the out port) of the text box. Click on the out port with your selection tool and your cursor will be loaded with text that you can deposit in an existing frame or a new frame will be created wherever you click. You can show which text is threaded through: *view>extras>show text threads*. To break the links, you merely double click on either the in port or the out port that are connected.

To change columns, inset spacing, or vertical justification you can choose: *object>text frame options*.

Placeholder Text
Type>fill with placeholder text

Use the character palette or control panel with the text to execute any desired changes to the text. Paragraph changes can likewise be executed through the paragraph panel.

6. Frames
The *color* palettes can be opened through: *window>color>color/gradient swatches* and applied to frames or objects within frames. If you wish to use a transparency on a frame to fade it into the background, so it does not compete with the text: object>effects transparency. To create a textured background, import a grayscale textured image, the image can be grayscaled in photoshop (*image>mode>grayscale*), you can then click on any swatch to colorize the grayscale image to match the color harmonies in your brochure.

Frames can be grouped with even spacing between them or aligned in different ways. To do this use the align palette: *window>object and layout>align.*

Tables can be made by initially making a text frame (go to type tool and then click drag) and then click on: *table>insert table*. Numbers of rows and columns can then be selected from the pop-up dialogue box. Or you can bring in data from another file into a text box and then click: *table>convert text to table*. Dragging can change individual column sizes. Shift drag on outside edge of the table will allow you to resize all columns proportionally. To make the columns all the same size, select a row of columns, then click: *table>distribute columns evenly*. To fine tune tables, click on a cell with the type tool and then activate table options: *tables>tables options>table setup*. To bring graphics into table cells, make sure text is deleted from cell and cursor is within the cell: *table>convert cell to graphic cell*.

6. Saving
If you want to save the document as an InDesign file
File>save as
If you want to save the document as a PDF:
File>export

7. Print
file>print