

Creating Special Text Formatting

Once you learn the basics of typefaces, character formats, and paragraph formats, you can achieve just about any look with text. The trick is combining and applying the skills you've learned to produce special effects that not only look professional but also enhance the meaning of the text.

Glance at any professional publication — a national magazine, direct-mail catalog, cookbook, or product brochure — and you'll notice typographic techniques that set the publication apart from anything that can be easily produced in a word processor. (Even when word processors do offer a feature, they often lack the control necessary to really fine-tune an effect.) And skilled designers use these effects with a purpose — special bullet characters emphasize a theme, drop caps draw readers in, and pull quotes tantalize.

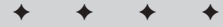
Throughout this chapter, you'll learn how standard InDesign features can produce typographic special effects, and more important, when to use them.

Indenting Text

InDesign lets you indent paragraphs from the left side, right side, or both sides of the column or text frame. You can also indent the first line of a paragraph independently of the rest of the paragraph. If Inset Spacing is specified in the Text Frame Options dialog box (Object ⇨ Text Frame Options, or ⌘+B or Ctrl+B), text is indented from the inset value. To apply indents, you use either the Control palette, the Paragraph pane (Window ⇨ Type & Tables ⇨ Paragraph, or Option+⌘+T or Ctrl+Alt+T).

19

CHAPTER



In This Chapter

Indenting text, adding bullets, and formatting lists

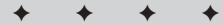
Adding initial caps and run-in heads

Creating reverse type, sidebars, and pull quotes

Specifying hanging punctuation

Rotating and scaling text

Adding drop shadows and feathering



Spacing guidelines for indents and bullets

The easy part of creating first-line indents, hanging indents, bulleted lists, and numbered lists in InDesign is using the software. The hard part can be deciding how much space to use. How do you decide how deep to make a first-line indent? How much space goes between a bullet and the text following it? Amateur publishers or designers, who are likely to be thinking in inches rather than points or picas, are likely to use too much space. They're tempted to use 0.25", 0.125", or another nice dividend of an inch for spacing rather than a more appropriate value such as 6 points. When deciding on spacing, consider the following:

- ♦ First-line indents that indicate new paragraphs should generally be one or two em spaces wide. The width of an em space is equal to the point size in use—so 10-point text should have a 10- or 20-point first-line indent. Opt for less space in narrower columns to avoid awkward space and more space in wider columns so the spacing is evident.
- ♦ As you remember from grade-school outlines, indents help organize information, with deeper indents indicating more detail about a topic. Professional publications, though, have many organizational options—such as headlines, subheads, and run-in heads—so they rarely have a need for more than two levels of indents. You might use indents on lengthy quotes, bulleted lists, numbered lists, kickers, and bylines. If you do, stick to the same amount of indent for each so the readers' eyes don't wander.
- ♦ In bulleted lists, use a hanging indent for a succession of two- or three-line bulleted paragraphs in wider columns. If your bulleted items are five or six lines long, especially in narrow columns, it might work better to use run-in heads to break up the information.
- ♦ Generally, the amount of space between a bullet and its text is equal to half the point size of the text. So if you're working with 11-point text, place 5.5 points between the bullet and text.
- ♦ When it comes to numbered lists, you need to decide whether you're going to include a period or other punctuation after the number and whether you'll ever have two-digit numbers. Numerals in most typefaces are the width of an en space, and they should be followed by the same amount of space the numbers and their punctuation take up. If you have a two-digit numeral, the numbers take up one em space and so should be followed by one em space.

While these values give you a good starting point, you might need to modify them based on the typeface, font size, column width, design, and overall goals of the publication.

A small icon with the text "Cross-Reference" inside a rectangular frame with a drop shadow.

For more on indenting and other paragraph settings, see Chapter 18. When you have a setting that works, create a paragraph style using it, as explained in Chapter 20.

First-line indents

To indicate a new paragraph, you might indent the first line or put a noticeable amount of space between paragraphs. If you opt to indent the first line, don't do it the typewriter way with tabs. Select the paragraphs, then enter a value in the First Line Left Indent field in the Paragraph pane or Control palette as shown in Figure 19-1. Press Shift+Return or Shift+Enter to see the results with the field still highlighted; press Return or Enter to get out of the pane and back into the document.

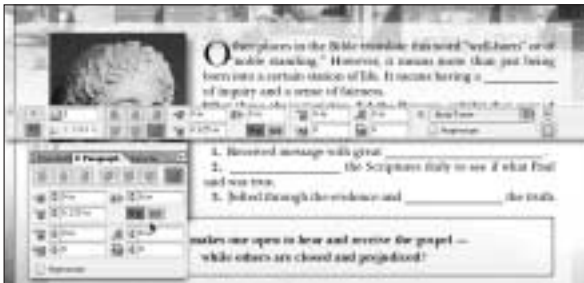


Figure 19-1: In this workbook, numbered paragraphs have a first-line indent of 0.125".

Hanging indents

In hanging indents, the first few characters of text (often a number or bullet) are aligned with the left margin while the remaining lines in the paragraph are indented. Notice the numbered items in Figure 19-2; the text that makes up the rest of the paragraphs “hangs” to the right of the numerals.

To create a hanging indent, first separate the textual items, bullets, or numbers from the text with a tab. Note the position of the tab, then specify a left indent for the paragraphs at the same location. Use the Left Indent field in the Control palette or Paragraph pane. Then enter the same value in the first-line indent field—except make the value negative to pull the first line back. For example, if you have a tab at 1.75", use a left indent of 1.75", and a first-line indent of -1.75". Figure 19-2 shows the same text as in Figure 19-1, formatted with an indent hang of 0.5".

Block indents

Publishers often offset quotes that are longer than a few lines by indenting the paragraph from both sides of the text frame or column. To do this, use the Left Indent

and Right Indent fields in the Paragraph pane or Control palette. In general, use the same values you use for first-line indents, and indent both sides the same amount.

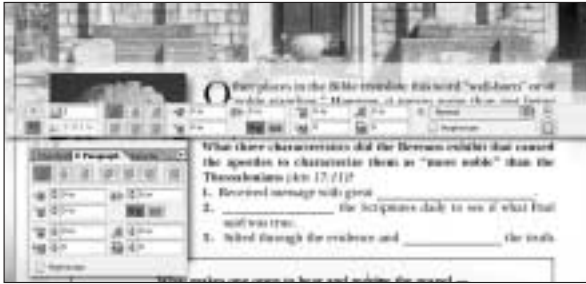


Figure 19-2: A hanging indent combines a tab and a left indent at the same value with a negative first-line indent.

Adding Bullets and Formatting Lists

Unlike many word processors, InDesign does not have a “bullet me” feature. You can’t just highlight paragraphs and add bullets or numbers. You have to type a bullet character or numeral at the beginning of each paragraph and insert spaces or tabs to offset the text. The good thing about this is you have complete control over the bullet or numeral’s font, color, size, and placement. And once you set up the formatting, you can automate it with both paragraph and character style sheets.

Note

You apply spacing to lists using tabs and indents—paragraph formats—so you’ll want to make sure each bulleted or numbered item is followed by a paragraph return. (Choose **Type** ⇨ **Show Hidden Characters** or press **Option+⌘+I** or **Ctrl+Alt+I** to confirm the existence of paragraph returns, which are indicated with the ¶ symbol.) If bullets or numerals exist in the text, look for a single tab character between the bullet or numeral and the following text. This lets you adjust only one tab stop. If you need to strip out extra tabs or change line breaks to paragraph returns, use the Find/Change dialog box (**Edit** ⇨ **Find/Change**, or **⌘+F** or **Ctrl+F**).

Adding bullets or numerals

Chances are, you’re not writing in InDesign. The text was delivered in the form of a word processing file, and the writer or editor made some decisions about bullets or numerals. A lot of times, writers will simply enter an asterisk followed by a space to indicate a bullet. Or maybe an editor typed a numeral followed by a parenthesis in front of each step. Other times, writers or editors might use their word processor’s automatic bullet or numbering feature. In many cases, you’ll need to repair the

bullets or numerals in the text using the Find/Change dialog box (Edit ⇨ Find/Change, or ⌘+F or Ctrl+F). The way you enter a bullet or numeral depends on what you started with:

- ♦ **If the writer or editor typed numerals or used an automatic numbering feature, the numbers and their punctuation arrive in InDesign intact.** However, you might want to change or even remove the punctuation following the numeral. The look of the numerals is more of a design decision than an editorial decision. If numerals are in a different typeface and/or in a different color, a period following the numeral might just look cluttered. Using Find/Change on a text selection, you can easily change or remove punctuation in numbered lists.
- ♦ **InDesign doesn't seem to like word processors' automatic bullets, converting them to characters in the current font, which will need to be changed to bullets.** Or, rather than using automatic bullets, the writer might have typed in asterisks, hyphens, or another character to indicate bullets. Once you determine what characters indicates bullets in your text, use Find/Change to change it to the bullet character you want. For example, you can search for an asterisk and change it to an *n* in the Zapf Dingbats font, which looks like a square ■.
- ♦ **If you're writing in InDesign, you can enter numerals and bullets as you type.** If you're editing and decide to add bullets or numerals to existing paragraphs, you can paste completely formatted bullets followed by tabs or spaces at the beginning of each paragraph. You can also paste a numeral, then edit the numeral's value as appropriate.

While you're adding bullet characters, decide on the font you're going to use. You can press Option+8 or Alt+8 for a simple, round en bullet (•) in the same typeface as the body text. You can choose a different character in the body text font, or pick a character in a symbol font such as Zapf Dingbats or Wingdings. Choose Type ⇨ Glyphs to see all the possibilities within a font, as explained in Chapter 41. For a list of common symbols, choose Type ⇨ Insert Special Character.



Choosing Type ⇨ Glyphs is a revised menu option for what had been Type ⇨ Insert Glyphs in the previous version of InDesign.

Deciding on initial formatting for bullets and numerals

Once your lists include bullets or numerals, use the Character pane (Window ⇨ Type & Tables ⇨ Character, or Option+⌘+T or Ctrl+Alt+T) to experiment with the formatting of a bullet or numeral. For example, change the typeface of a numeral and increase the size slightly or horizontally scale the symbol used for a bullet. You can also apply a color to the *stroke* (outlines) or *fill* (inside) of the bullets or numbers; see the “Applying Color to Text” section later in this chapter.

Adding space between bullets or numerals

In addition to the formatting of bullets and numerals, you need to decide how text will follow them. Figure 19-3 shows three different options for bullets. The first column shows an en bullet followed by a tab; the second column shows an en bullet followed by a tab and a hanging indent; the third column shows a Zapf Dingbats sideways heart used as a bullet followed by a tab and hanging indent. Figure 19-4 shows a typical example, from a brochure.



Figure 19-3: These three columns show the evolution of an en bullet to a fancy bullet followed by a hanging indent. In this case, the writer typed an en bullet followed by a tab in front of each paragraph in Microsoft Word (avoiding the Bullets and Numbering feature). The designer flowed in the text, formatted it, and repositioned the tab. In the second column, the designer specified a hanging indent. The designer then decided to choose a different character for the bullet, so she highlighted the text and used Find/Change to change en bullets to a sideways heart shape in Zapf Dingbats font.



Figure 19-4: This brochure uses red diamonds as its bullets, separated from the text with a tab for consistent alignment.

Bullet character options

Although you may not know what they're called, you're used to seeing en bullets, the small round bullet (•) included in most typefaces. But you're not limited to using this character. You can use any character in the body text font, or you can switch to a symbol or pi font and choose a more decorative character.

Zapf Dingbats and Wingdings are the most common symbol fonts, offering an array of boxes, arrows, crosses, stars, and check marks. These can be cute and effective, but cute isn't always a good thing. If you opt for a different bullet character, make sure you have a reason and that it works well with the rest of the design. Check mark bullets in an election flyer might make sense; square bullets in a to-do list for a wedding caterer might not make sense.

Note that you might want to reduce the size of the symbol slightly and that you might need to use different spacing values than you would use with an en bullet.

Don't limit yourself to these two common fonts either. You can purchase many different symbol fonts to support different content. For example, you might see leaf-shaped bullets in an herb article and paw-print bullets in a pet training article. To use your own drawing or a logotype as a bullet, convert the drawing to a font using a utility such as Macromedia Fontographer and Pyrus FontLab (see the companion Web site www.INDDcentral.com for links to these and other font utilities).

The most consistent way to space a bulleted or numbered list is to separate the bullet or numeral from the text with a single tab as shown in Figure 19-4. You can then create a hanging indent as described earlier in this chapter, and you can indent the paragraphs from the left and/or right as you wish.

Applying style sheets for numbered and bulleted lists

The combination of paragraph and character formats necessary to produce numbered and bulleted lists can be tedious to apply. You'll want to save the basic formatting as a paragraph style sheet. If the bullets or numerals have different formatting, save that as a character style sheet. Make sure to specify keyboard commands for the style sheets so you can apply them quickly (see Chapter 20).

To apply the style sheets to existing text, first highlight all the paragraphs, then apply the paragraph style sheet. Then you can highlight each numeral or bullet and apply the character style sheet. With bullets, you can use Find/Change to locate all the bullets and apply the character style sheet.



The new Nested Styles feature lets you have the paragraph style automatically apply a character style to a user-specified range of text. Chapter 20 covers this in more depth.

With a nested style, you can automate this formatting. For example, you could have a paragraph style named *Bullet* that applies a character style named *Bullet* to the first character of the paragraph (for example, to apply the Zapf Dingbats font, which, if the first character in the paragraph is an *n*, results in a solid square bullet).



If you're not using nested styles, make sure to apply the paragraph style sheet first, and the character style sheet second, or the paragraph formatting will wipe out your special numeral or bullet formatting.

Adding Initial Caps

Nothing sets off a professional publication from an amateur or word-processed document like the use of initial caps. Decorative characters at the beginning of paragraphs serve both editorial and design purposes, drawing readers into the content with their size and position, while emphasizing a theme with their style.

You'll see initial caps ranging from a single four-line drop cap in the same typeface as the paragraph in a financial publication's letter from the editor to a 140-point word in a script face kicking off a feature article in a bridal magazine. Initial caps often use more decorative typefaces—you can even purchase fonts that consist only of ornate capital letters. A children's book might use a graphic of a letter formed from an animal's body, and a cooking magazine might use the outlines of a letter filled with an image of related foods. You can achieve all these effects with the typographic and layout features in InDesign.



Don't forget that text is for reading. Heavily designed initial caps can become unrecognizable as text, leaving the reader with a disjointed word or sentence in the first paragraph of a story. No matter how gorgeous a 192-point *S* looks flowing behind a paragraph in rose-colored Kuenstler Script, if the readers don't recognize the *S*, he's left trying to make sense of the word *ensitivity*. You would have been better off leaving *Sensitivity* to start the paragraph and drawing a nice curly shape behind the text.

Creating automatic drop caps

A *drop cap* is an enlarged capital letter at the beginning of a paragraph that drops down several lines into the text. In daily newspapers and weekly magazines, which are likely to have limited production time, the most common effect you'll see is a simple drop cap in the paragraph's font. Simple drop caps such as these can be created automatically—in two simple steps—in InDesign. Even though drop caps look like character formatting, they're actually created through a paragraph format. This ensures that drop-cap formatting remains in the paragraph even if you edit or delete the original first characters.

To create a drop cap:

1. **Select the Type tool and click in the paragraph to select it.**
2. **Make sure either the Control palette or Paragraph pane is open.**
3. **Specify how many lines down the characters should drop into the paragraph by typing a number between 2 and 25 in the Drop Cap Number of Lines field.**

Generally, you'll drop the characters three to five lines.

4. **Specify how many characters in the first line should be enlarged as drop caps by typing a number between 1 and 150 in the Drop Cap One or More Characters field.**

Generally, it looks best to drop the first character or the first word in the story. If the columns are wide enough, you can drop the first phrase.

5. **Press Return or Enter to see the drop caps.**

Once you've created a drop cap with the InDesign feature, you can highlight the enlarged characters and change the font, color, or any other character formats. See Figure 19-5 for an example of a four-line drop in a different font and color.

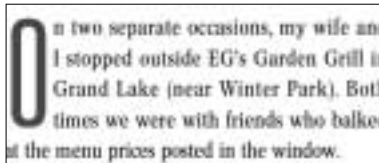


Figure 19-5: This drop cap has an entry of 4 in the Drop Cap Number of Lines field and 1 in the Drop Cap One or More Characters field. It also has the font changed to Univers Light Ultra Condensed and the color to brick red.

For different drop caps effects, try the following:

- ♦ Tab after the drop caps, then create a hanging indent so the text is aligned to the right of the characters.
- ♦ Kern between the drop caps and the paragraph text to tighten or expand the space.
- ♦ Baseline-shift the drop caps to move them up or down.
- ♦ Change the font size of the drop caps to enlarge them and raise them above the paragraph.
- ♦ Scale the drop caps to make them more dramatic.

Remember to save the drop caps' existence as a paragraph style sheet, and any modifications to the drop caps as a character style sheet.

**Note**

If you decide to drop the entire first word or phrase in a story, you'll have to count the number of characters and change the value in the Drop Cap One or More Characters field for each paragraph, since each paragraph's initial word or phrase will have a different number of characters. This means you can't apply the formatting automatically with a paragraph style sheet—you'll have to give each introductory paragraph individual attention.

**Tip**

If the first character in a paragraph is a quotation mark (" or '), it can look odd as a one-character drop cap. If you don't like this look, you have a couple options: You can either delete the opening quotation mark, an acceptable but potentially confusing practice, or you can use the first two characters in the paragraph as drop caps instead. Some publications simply prefer not to start paragraphs with quotes, preventing the problem from the editorial side.

Creating raised initial caps

Raised caps are another form of initial caps, enlarging and raising the first few characters of the paragraph above the first line in the paragraph. Creating raised caps is simple—highlight the characters you want to raise with the Type tool and enlarge them using the Font Size field on the Character pane (Window ⇧ Type & Tables ⇧ Character, or ⌘+T or Ctrl+T) or Control palette.

If you raise a word or phrase, you might need to track the raised words to tighten them. You also might need to kern between the raised text and the remainder of the line. Other options for raised caps include changing the font, color, and scale of the characters. See Figure 19-6 for an example of raised caps used in a subhead. If you plan to repeat the raised-cap formatting, save it as a character style sheet.

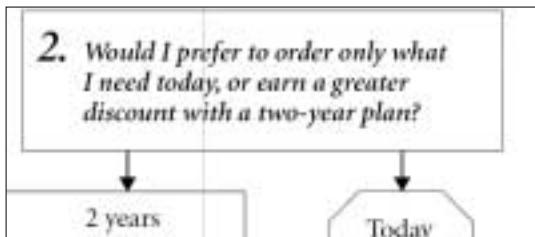


Figure 19-6: The number 2 in this caption is an example of a raised cap: It has a larger size than the text that follows to call attention to it, in this case as a step.

Converting text to outlines for initial caps

You can convert drop caps, raised initial caps, or any character in any font to a frame. You can then resize, scale, shear, fill, and stroke the character-shaped frame. To do this, highlight the characters with the Type tool, then choose Type ⇨ Create Outlines, or press Shift+⌘+O or Ctrl+Shift+O. Frames are based on the size and outlines of the font in use and are automatically anchored in the paragraph so they flow with the text.

**Note**

When you convert text to outlines, the characters no longer exist as text. If you converted part of a word, the remaining portions of the word may be flagged during a spelling check. If you need to edit the text, you will need to delete the outlines, retype the word, and convert the characters again.

Using graphics as initial caps

Rather than using text for initial caps, you can use graphics. You can purchase clip-art collections that consist of nothing but ornate capital letters to use as initial caps. To use a graphic as an initial cap, first delete the characters you will replace with graphics. Then, use the Place command (File ⇨ Place, or ⌘+D or Ctrl+D) to import the graphic.

Size the graphic as appropriate, then place it behind the paragraph, next to the paragraph, or anchored in the text of the paragraph. To anchor a graphic in text, select it with the Selection tool and choose Edit ⇨ Cut, or press ⌘+X or Ctrl+X. Select the Type tool and click at the beginning of the paragraph, then choose Edit ⇨ Paste, or press ⌘+V or Ctrl+V. The graphic is now anchored to the text, so if text is reflowed, the graphical drop cap will flow with it.

In addition to importing graphics for use as initial caps, you can create your own graphics in InDesign. For example, you can place the initial cap character in its own text frame and create reverse type from it as discussed later in this chapter. Or you can shade the character and place it slightly behind the paragraph.

Labeling Paragraphs

Along with initial caps, changing the formatting of the first few words in a paragraph can indicate the beginning of a story or a new topic. This is commonly used for run-in heads, a short title usually in boldface or italic, and often in a contrasting font, that is on the same line as the rest of the paragraph.

The following descriptions show frequently used label formatting:

- ♦ **Boldface:** Bold speaks the loudest, and is generally used for subheads in magazines, newspapers, and reports. To apply boldface in InDesign, you must select the bold version of the typeface from the Style pop-up menu on the Character pane.
- ♦ *Italics:* If bold shouts, italics tends to whisper. It's a good choice for tertiary heads and to label bulleted items within a list. To apply italics in InDesign, you must select the oblique version of the typeface from the Style pop-up menu on the Character pane.
- ♦ Underlines: For a typewriter-effect, you might underline the text of a label. Use the Underline command available from the menu on the Character pane—you have no control over the style, thickness, or placement of the line.
- ♦ **SMALL CAPS:** For a subtle, classic look that blends well with the rest of the document, use small caps on labels. However, don't use small caps if you're using labels as subheads that allow readers to skim through a document and read only relevant portions. You have two choices for applying small caps from the Character pane: Choose a small-caps variation of a typeface from the Style pop-up menu or choose the Small Caps command from the palette menu.
- ♦ **Typeface change:** Rather than relying on different variations of a font, you can use a different font altogether, such as Futura Medium as used on this paragraph, for a label. To contrast with serif body text, you might choose a sans-serif typeface that complements the look of your publication. Often, this will be a variation of your headline font. To apply a typeface, use the Font pop-up menu in the Character pane or Control palette.
- ♦ **Scaled text:** Scaling text horizontally—up 10 or 20 percent—quietly differentiates it from the remainder of the paragraph. (More severe scaling will distort the typeface and could look unprofessional.) Unlike bold or underline, the text won't pop off the page at you, but it will be visually distinct. Scaling text vertically, however, can be too subtle unless combined with boldface or another style. Use the Horizontal Scale and Vertical Scale fields in the Character pane or Control palette to scale text.
- ♦ **Size change:** Creating a label by simply bumping the size up a point or two is another subtle design choice. The labels blend well with the body text, but they don't announce their presence enough to be used as subheads for scanning. To change the size of type, use the Font Size field in the Character pane or Control palette.

The label technique—whether implemented via local character formatting, a character style, or a nested style—can be used for any amount of text, from a single bullet to one or more sentences. For example, the guidebook shown in Figure 19-7

styles the first sentence in the introductory paragraph as italic. In many magazines, the first paragraph of a story often starts with a single drop cap, followed by the entire first line in small caps.



Figure 19-7: The use of nested styles in this paragraph automatically italicizes the first sentence in this intro paragraph.

The Nested Styles feature is flexible, letting you specify it to any number of characters, words, or sentences, as well as to specific locations such as the first tab. That lets you use it for numbered lists where the number of digits may change (such as a 15-item list that has both single-digit numbers like 9 and double-digit numbers like 10) — you'd have the nested style apply the appropriate character style through the first tab, so any numerals before the tab take on that character style. (For example, you might want to boldface the numbers in a list and change the font to a sans-serif one.) Figure 19-7 shows an example of this feature, where the intro paragraph uses a nested style to italicize the first sentence of the introductory paragraph. (The paragraph style also specifies the initial drop cap.)

Cross-Reference

Chapter 20 covers nested styles in more detail.

To experiment with label formatting, use the attributes available via the Character pane or Control palette and their palette menus, such as font changes, horizontal scale, or small caps. Once you decide on the formatting for labels, you can apply it using character style sheets after paragraph style sheets are applied—and after the text is final. You may also be able to use the nested styles feature, if there is a consistent pattern to the label text, such as being a specific number of words or characters or being a sentence.

**Note**

Depending on the formatting, applying a label style might reflow the text, causing a need for copyfitting.

**Tip**

To provide a little more space between the label and the text, you might want to use an en space rather than a normal space.

Adding Professional Touches

With today's word processors and low-end page-layout programs offering pre-designed templates for birthday cards and reports, almost anyone can claim to be a designer. But a closer look reveals the difference—skilled graphic designers plan their typography and layout around the content, using typographic techniques to call attention to and refine content. The use of reverse type, sidebars, and pull quotes helps break up pages and organize text, while careful formatting of fractions, hanging punctuation, and end-of-story markers adds a professional touch.

Reversing type out of its background

This is the reverse of what you usually see—white type on a black background rather than black type on a white background. Of course, reverse type doesn't have to be white on black, but any lighter color on a darker color. You'll often see reverse type in table headings, *kickers* (explanatory blurbs above headlines), and decorative elements. Reverse type, which brightens text and pulls readers in, works best with larger type sizes and bold typefaces so the text isn't swallowed by the background.

InDesign doesn't have a reverse type command or *typestyle*—but using this effect involves just a simple combination of basic InDesign skills. To lighten the text, highlight it with the Type tool, click the Fill button on the Toolbox, and choose a light color from the Swatches pane (Window ⇨ Swatches, or F5). For a dark background, you have three options: filling the text frame with a darker color, making the text frame transparent and placing it on top of darker objects, or using a ruling line behind the text.

For the first two options, select the text frame with the Selection tool or the Direct Selection tool, then click the Fill button on the Tools. To fill the text frame with a color, click a darker color on the Swatches pane. To make the text frame transparent, click the Apply None button on the Tools. Then place the text frame in front of a darker object or graphic.

For reverse-out type that is not in its own text frame, you use a ruling line of the appropriate width (at least a couple points larger than the text size) and move it into the text. If you use a Ruling Line Above, you would move the line down behind the text; if you use a Ruling Line Below, you'd move it up. Figure 19-8 shows reversed-out type used as description headings, as well as the Paragraph Rules dialog box and the settings used to create the effect. (To access this dialog box, choose Paragraph Rules from the palette menu of the Control palette or Paragraph pane, or press Option+⌘+J or Ctrl+Alt+J.)

Tip

When designing elements with reverse type, make sure the point size of the text is large enough to print clearly on the darker background. Consider the thinnest part of characters, especially in serif typefaces, when judging the size and thickness of reverse type. You'll often want to use a semibold or bolder version of a font so the text maintains its visual integrity.

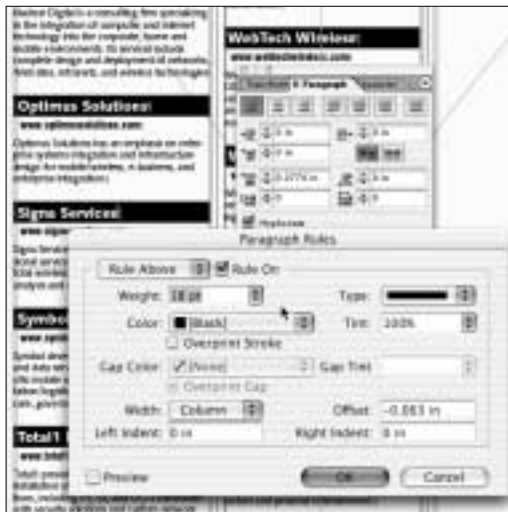


Figure 19-8: This product guide uses reversed-out text created via ruling lines for its description titles.

Creating sidebars and pull quotes

Pick up almost any publication, from *Time* magazine to your neighborhood newsletter, and you're almost guaranteed to see sidebars and pull quotes. So basic that you can even create them with a modern word processor, these treatments aren't really typographic treatments—they're just page-layout techniques involving text elements you create by applying simple InDesign skills.

A *sidebar* is supplemental text, formatted differently, and often placed within a shaded or outlined box. Sidebars help break up text-heavy pages and call attention to information that is often interesting but not essential to the main story. Even in technical publications, it's helpful to pull in-depth information or related text into sidebars to provide visual relief. To create a sidebar, you'll usually place the text in its own frame, then stroke the frame and optionally fill it with a tint. To inset the text from the edges of the frame, use the Text Frame Options dialog box (Object ⇨ Text Frame Options, or ⌘+B or Ctrl+B).

A *pull-quote* is a catchy one- or two-line excerpt from a publication that is enlarged and reformatted to achieve both editorial and design objectives. On the editorial side, pull quotes draw readers into articles with excerpts that do everything from summarize the content to provide shock value. On the design side, pull quotes break up staid columns and offer opportunities for typographic treatment that emphasize the content (such as colors and typefaces that reflect the mood of an article). Although the use of and length of pull quotes is often dictated by design, an editorial person should select the text and indicate it on hard copy or within text files. To create a pull quote, copy and paste the relevant text into its own text frame, then reformat the text and frame as you wish. Use the Text Wrap pane (Window ⇨ Type & Tables ⇨ Text Wrap, or Option+⌘+W or Ctrl+Alt+W) to control how text in columns wraps around the pull quote.

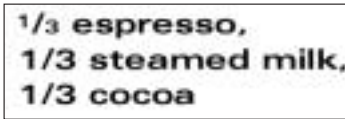
Formatting fractions

If you're in a big hurry, it's fine to type $1/3$ cup and get on with your life. It looks like a fraction, but it's kind of big and ugly, and it calls a little too much attention to itself. Compare the first line in Figure 19-9, which is formatted appropriately for a fraction, to the last two lines, which are not. InDesign doesn't provide an automatic fraction maker, but you can use expert typefaces or character formats to achieve professional-looking fractions.

QuarkXPress
User



InDesign has no equivalent to QuarkXPress's fraction-building tool.



1/3 espresso,
1/3 steamed milk,
1/3 cocoa

Figure 19-9: In the first line of text here, the “1/3” text is formatted manually to look like a true fraction.

Applying a fraction typeface

Some expert typefaces include a variation, appropriately called fractions, that include a number of common fractions such as $\frac{1}{2}$, $\frac{1}{3}$, $\frac{1}{4}$, and $\frac{1}{5}$. Adobe has so-called Expert Collections for many of its popular fonts; these collections include true small caps, true fractions, and other typographic characters. Many OpenType formats have these characters included as well. You can also use a symbol font, though the numerals may not exactly match the appearance of numerals in the rest of your text, since symbol fonts typically use plain fonts like Helvetica as their basis.

To use a true fraction from an Expert Collection, symbol, or OpenType font, choose Type ⇨ Glyph, then select the font and face from the pop-up menus at the bottom of the dialog box, then select the fraction you want.



Tip

If you're dealing with a wide range of fractions in something like a cookbook, you probably won't find all the fractions you need. Because it would be difficult to format fractions such as $\frac{1}{6}$ exactly the same as an expert font's $\frac{1}{4}$, you might opt for formatting all the fractions manually.

Formatting fractions manually

You'll notice that expert fractions are approximately the same size as a single character in that font. That's your eventual goal in formatting a fraction. Usually, you achieve this by decreasing the size of the two numerals, raising the numerator (the first, or top, number in the fraction), and kerning on either side of the slash as necessary.

For example, see the fraction in the first line of Figure 19-9. The rest of the text is set at 9 points, but the denominator (the number after the slash in a fraction, or 3 here) has been set to 6 points using the Font Size field in the Character pane. The 1 is set as a superscript using the Character pane. The 1/ and the /3 are both kerned by -50. (You can also use the Control palette to access these controls.) The font size and kerning that works for your font, size, and values will vary.



Macintosh fonts provide another option for refining fractions. It's a special kind of slash called a *virgule*, which is smaller and at more of an angle than a regular slash. Press Option+Shift+1 to enter a virgule, then kern around it as you would a slash. (The fraction in the first line of Figure 19-9 uses a virgule rather than a regular slash.)

Note

InDesign's default superscript and subscript size is 58.3 percent of the character's size (this odd value actually equals $\frac{7}{12}$, in keeping with typography's standard of using points, of which there are 12 in a pica, for text measurement). The numerator and denominator in a fraction should be the same size, so if you use InDesign's superscripts at its default settings, multiply the text's point size by 0.583 (just highlight the denominator text, go to the Size field in the Character pane or Control palette, and type ***0.583** in the Size field after the current point size). I recommend changing InDesign's superscript and subscript type styles to 65 percent to improve readability, especially at smaller sizes. You can change these default settings in the Text pane of the Preferences dialog box (choose InDesign ⇨ Preferences on the Mac or Edit ⇨ Preferences in Windows, or press ⌘+K or Ctrl+K).

Unless you're rarely confronted with fractions, by all means save your formatting as character style sheets. You'll be able to apply the formats with a keystroke or use Find/Change (Edit ⇨ Find/Change, or ⌘+F or Ctrl+F) to locate numbers and selectively apply the appropriate character style sheet.

Hanging punctuation

When display type, such as a pull quote or headline type in ads, is left-aligned or justified, the edges can look uneven due to the gaps above, below, or next to quotation marks, punctuation, and some capital letters. See the text frame at right in Figure 19-10, which does not have hanging punctuation. To correct the unevenness, graphic designers use a technique called *hanging punctuation*, in which they extend the punctuation slightly beyond the edges of the rest of the text as shown in the text frame at left in Figure 19-10.

Note

The "edge" of text is defined by the edges of the text frame or any Inset Spacing specified in the Text Frame Options dialog box (Object ⇨ Text Frame Options, or ⌘+B or Ctrl+B).

InDesign's Optical Margin Alignment feature automates hanging punctuation, extending punctuation and the edges of some glyphs (such as a capital *T*) slightly outside the edges of the text. (Assume Adobe bills this feature as margin alignment rather than hanging punctuation because it also works with capital letters.)

Unfortunately, you can't control how much the characters "hang" outside the text boundaries — InDesign decides that for you. And Optical Margin Alignment applies to all the text frames in a story, rather than to highlighted text. This means you need to isolate into its own story any text for which you want hanging punctuation.

To specify Optical Margin Alignment, select any text frame in a story and choose Window ⇨ Type & Tables ⇨ Story. Check Optical Margin Alignment, as shown in Figure 19-10.



Figure 19-10: Notice the difference between the text frame at right, with standard alignment, and the text frame at left, with Optical Margin Alignment (otherwise known as *hanging punctuation*).



Note

In general, Optical Margin Alignment improves the look of display type whether it's left-aligned, centered, justified, or even right-aligned. However, Optical Margin Alignment will actually cause columns of body text to look uneven (as they are).

Choosing and placing end-of-story markers

In magazines, newsletters, and other publications with multiple stories, the text often continues from one page to the next. In newsmagazines, a story might meander from page to page, interrupted by sidebars and ads. In a fashion magazine, stories generally open on a splashy spread, then continue on text-heavy pages at the back of the magazine. In either case, readers can get confused about whether a story has ended. Designers solve this by placing a *dingbat* (a special character such as a square) at the end of each story.

You can use any dingbat character — in Zapf Dingbats, DF Organics, Woodtype, or Wingdings, for example — or an inline graphic to mark the end of a story. The end-of-story marker should reflect the overall design and feel of a publication, or emphasize the content. You might see a square used in a financial publication, a heart in a teen magazine, or a leaf in a gardening magazine. A derivative of the company's logo might even be used to mark the end of a story — you can easily envision the Nike swoosh used in this way.

To place a dingbat, first decide on the character and create a character style sheet for it. If you're using a graphic, you might consider converting it to a font with a

utility such as Macromedia Fontographer or Pyrus FontLab so you can insert and format it automatically. If you're using an inline graphic, you might store it in an InDesign library (see Chapter 7) so it's easily accessible. Make sure everyone working on the publication knows the keystroke for entering the dingbat or the location of the graphic.

Once you have the character established, you need to decide where to place it. Generally, the dingbat will be flush with the right margin or right after the final punctuation in the last line:

- ♦ To place the dingbat flush with the right margin, there are two ways to set a right-aligned tab:
 - One is to choose Type ⇨ Insert Special Character ⇨ Right Indent Tab or press Shift+Tab.
 - The other way is to set a tab stop in the paragraph style sheet you use for final paragraphs (see Chapter 21 for more details on setting tabs). Because InDesign offers an easier method to right-indent a dingbat, you should use this method only if you want to right-align the dingbat to a place in the column other than at the right margin — essentially, if you want to have it indented a little from the right margin.
- ♦ To place the dingbat after the final punctuation, separate the two with an en space by typing Option+Spacebar or Ctrl+Shift+6, or with an em space by typing two en spaces.

Applying Color to Text

Just because you're printing on a four-color printing press or have a color printer doesn't mean you should be getting carried away with coloring text. You want to keep your content legible and unified, but that doesn't have to mean it's all black on white. You'll commonly see color in headlines, banners, subheads, and pull-quotes. However, you'll rarely see color applied to body text.

Colors applied to text are often derived from colors within related graphics or from a publication's traditional palette. In general, the smaller the type, the darker its color should be — with pastels reserved for large text, bright colors for bold text, and dark colors for body text. InDesign lets you make an entire character one color, or make the *fill* (inside) and *stroke* (outlines) of a character two different colors, as shown in Figure 19-11. You can even apply gradients to fills and strokes.

To color text:

1. Click the Type tool in the Toolbox or press T.
2. Highlight the text you want to color.

3. Click the **Fill** button or the **Stroke** button on the **Tools** palette to specify whether you're coloring the character or its outlines.
4. If necessary, open the color **Swatches** pane by choosing **Window ⇨ Swatches** or pressing **F5**.
5. Click a color swatch to apply it to the stroke or fill.
6. To specify the thickness of the stroke, use the **Strokes** pane (**Window ⇨ Stroke**, or **F10**) and to apply a gradient to the stroke or fill, use the **Gradient** pane (**Window ⇨ Gradient**).

Cross-Reference

For information about creating color swatches or working with gradients, see Chapters 8 and 28.

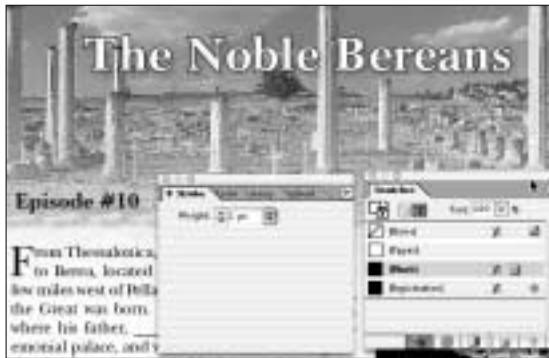


Figure 19-11: The episode headline has a 1-point black stroke and a fill color of white.

Rotating Text

You've seen newsletters with nameplates running horizontally down the first page and catalogs with *sale* splashed diagonally across pages. You do this by placing the text you want to rotate in its own frame, then rotating the entire frame. InDesign lets you rotate any object from 180 degrees to -180 degrees — basically, full circle. You can rotate in increments as small as 0.01 degree using the Rotate tool or 0.001 degree using the Rotation Angle field on the Transform pane or Control palette. (Figure 19-12 shows the icons.)



Figure 19-12: The Rotate tool (left) from the Tools palette and the Rotation Angle field from the Transform pane and Control palette.

Using the Rotation Angle field

Use the Rotation Angle field on the Transform pane or Control palette if you know the angle you need. For example, to run text along the left side of a graphic like the photo credit in Figure 19-13, you rotate the frame 90 degrees. To use the Rotation Angle field, select the object with the Selection tool. Then choose an option from the pop-up menu, which offers 30-degree increments, or enter a value in the field. Hit Return or Enter to rotate the object.

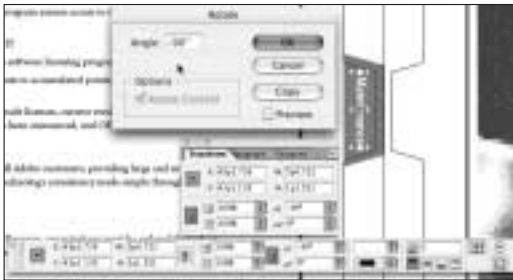


Figure 19-13: The Rotation Angle field on the Transform pane or on the Control palette lets you rotate selected objects with 0.001 degree of precision. Entering a value in the field is ideal for turning a tab-like section head 90 degrees to place it within a frame shaped like a binder tab. You can also double-click the Rotate tool to get the Rotate dialog box shown at top to enter a precise rotation amount.

Using the Rotate tool

Use the Rotate tool to experiment with different angles while designing. To rotate items freehand, select the Rotate tool by clicking it in the Tools palette or pressing R (unless the Type tool is selected). If the object you want to rotate isn't selected, ⌘+click it or Ctrl+click it. Drag in any direction to rotate the object, releasing the mouse button as necessary to check the placement and any text wrap. To restrict the rotation to 45-degree increments, press the Shift key while you drag.

**Tip**

You can also double-click the Rotate tool to get a dialog box in which you enter a precise rotation value, as Figure 19-13 shows. Not only can you set the rotation amount, you can control whether the content rotates with the frame or whether the rotation will apply to a copy of the item.

Scaling Text

While you're roughing out a design, you'll probably find yourself changing type sizes, object placement, and colors as you go. Changing the size of text can get a little tedious — especially if the text is tucked into its own frame. You have to select the Type tool, highlight the text, enter a new size, then often switch to the Selection tool to resize the frame so the text doesn't overflow. For a more interactive method of resizing text, you can use the Scale tool to resize the text and its frame at the same time.

To use the Scale tool, click it in the Tools palette or press S (if the Type tool is not selected). If the text frame is not already selected it, you'll need to ⌘+click or Ctrl+click. Then simply drag any frame edge or handle in any direction. To scale proportionally so the text is not distorted, press the Shift key while you drag. The amount of scaling is reported in the Scale X Percentage and Scale Y Percentage fields in the Transform pane or in the Control palette.



Be careful in scaling text frames and the text within them. If you modify multiple text frames that contain similar items (such as headlines), you'll end up with inconsistent text formatting for like items, which will look terrible. You should scale text only when it is a unique element, such as a headline in an ad, and thus not likely to create visual inconsistencies.

Underline and Strikethrough Options

InDesign lets you create custom underlines and strikethroughs. While you'll use these sparingly, they can be effective for design-oriented text presentation, such as shown in Figure 19-14.



The ability to create custom underlines and strikethroughs is new to InDesign CS.

The Character pane and Control palette's palette menus provide the Underline Options and Strikethrough Options menu items to create customer versions. The process for the two is similar:

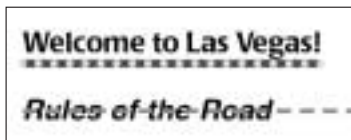


Figure 19-14: Examples of custom underlines and strikethroughs.

1. Highlight the text to which you want the custom underline or strikethrough.
2. Specify the thickness, type, color, and other settings for the line that makes up the underline or the strikethrough line.

Note that if you choose a line type that has gaps — such as dashed, dotted, or striped lines — you can also choose a gap color, such as was done for the top example in Figure 19-14. Figure 19-15 shows the Underline Options and Strikethrough Options dialog boxes.



Figure 19-15: The Underline Options (top) and Strikethrough Options dialog boxes. At right is the list of line types available in both dialog boxes.

3. Apply the underline or strikethrough style via the Control palette, Character pane, or keyboard shortcut (Shift+⌘+U and Shift+⌘+/, or Ctrl+Shift+U and Ctrl+Shift+/,).

Note that a custom underline or strikethrough created and applied this way is in effect only for the first text to which an underline or strikethrough is applied. InDesign reverts to the standard settings the next time you apply an underline or strikethrough. If you want to use a custom underline or strikethrough setting repeatedly, you should define the setting as part of a character style, as described in Chapter 20.



InDesign has no equivalent to QuarkXPress's Underline Styles. Instead, specify custom underlines and strikethroughs as part of a character style sheet. To add stripes and dashed lines, open the Strokes pane (Window ⇨ Stroke, or F10) and select the Stroke Styles option from the palette menu, as described in Chapter 11.

Drop Shadows and Feathering

InDesign offers built-in drop shadow and feathering that let you create dimensional effects based on simulated lighting.

QuarkXPress
User



QuarkXPress does not offer drop shadow or feathering features, although there are third-party plug-ins to add these capabilities.

Drop shadows

The Drop Shadow dialog box is shown in Figure 19-16 and accessed by choosing Object ⇨ Drop Shadow or pressing Option+⌘+M or Ctrl+Alt+M. To apply a drop shadow to an object, you select it with a selection tool—you cannot apply the shadow to just highlighted characters. In the dialog box, you set the following options:

- ♦ Check the Drop Shadow option to turn on the drop shadow function.
- ♦ Select a lighting type (technically, a blend mode) by choosing one of the 16 options in the Mode pop-up menu. (Chapter 25 covers these in detail.)
- ♦ Specify the opacity by entering a value in the Opacity field—0% is invisible, while 100% is completely solid.
- ♦ Specify the shadow's position relative to the object using the X Offset and Y Offset fields. A positive X Offset moves the shadow to the right, while a positive Y Offset moves the shadow down. Negative values go in the other direction.
- ♦ Specify the shadow's size by entering a value in the Blur field—this blurs a copy of the text used in the drop shadow to make it look like it was created by shining light on solid letters.
- ♦ Choose a color source—Swatches, RGB, CMYK, and LAB—from the Color pop-up menu, then select a color from the sliders or swatches below. You'll get sliders for RGB, CMYK, and LAB with which to mix a color if you selected RGB, CMYK, or LAB in the Color pop-up menu, and a set of previously defined color swatches if you selected Swatches in the Color pop-up menu.
- ♦ To see the effects to your selected object as you experiment with various settings, check the Preview option.



Tip

Although traditionally associated with text, you can apply drop shadows to any objects, such as frames and shapes.



Cross-Reference

Chapter 25 covers transparency and opacity in more detail.



Figure 19-16: The Drop Shadow dialog box and an example drop shadow.

Feathering

A similar option to drop shadows is feathering, which essentially softens the edges of objects. Like drop shadows, feathering can be applied only to objects, not individual text, paths, or strokes. To feather an object, first select it and then choose Object ⇨ Feather. You'll get the dialog box shown in Figure 19-17.

To apply feathering, check the Feather option. You then enter a value for the degree of feathering—smaller numbers have the least effect, larger numbers have the most effect. The feathering area starts at the outside edge of the object, so a larger number “eats into” the object, making it a wispiest version of itself, as Figure 19-17 shows. The Corners pop-up menu gives you three options: Sharp, Rounded, and Diffused. The Sharp option retains the original shape as much as possible. The Rounded option rounds the corners of the object; it can distort the shape dramatically at larger Feather Width settings. The Diffused option creates a soft, almost smoky effect by making the object more translucent.



Figure 19-17: The Feather dialog box and an example feathering effect.

Summary

InDesign gives you the power to embellish and manipulate text in almost infinite ways. It's your responsibility to format text in ways that clarify and reinforce the content rather than simply decorate it. Bulleted lists — often created with special character bullets, tabs, and hanging indents — help break out information. Initial caps and run-in heads call attention to the beginning of a story or to topic shifts within a story. You can pull readers into a story with sidebars and pull quotes, which also break up text-heavy areas. For display type, InDesign provides an automatic method for hanging punctuation outside the margins, and it allows you to rotate and scale text. It also provides drop shadow and feathering tools that create dimensionality and lighting effects.



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