

# Paul Erdman's InDesign Top 10 Tips & Tricks

## 1. Create the Perfect Workspace

- Reduce some infrequently used panels to buttons, stack them, and dock them.
- Consider using two docked vertical stacks that show commonly used panels.
- Reduce panel groups in stacks when not in use (double-click at tab).
- Get your panels out of the way quickly (tab key or click the double-arrow button at the top of the panel stack).
- Save workspaces and return to them as needed (*Window: Workspace: New*).
- Multiple document windows: view multiple pages of a document simultaneously (*Window: Arrange: New Window*).

## 2. Save Time with Custom Keyboard Shortcuts

- The default shortcut to toggle preview mode is 'w.' If you're tired of accidentally typing random 'w's into your document, try making a new shortcut. MAC: Since *Cmd+H* is used by the system, I use *Ctrl+H*. Win: try *Ctrl+H*.
- Default paste puts content into the center of your screen. If you want to paste in place the default shortcut is cumbersome. Consider changing the Paste In Place shortcut to *Cmd+V* (Windows *Ctrl+V*), set a shortcut for paste when using text to *Cmd+V* (Windows *Ctrl+V*), and then some other shortcut for regular paste.
- Make custom keyboard shortcuts as needed to avoid the tedium of repeatedly navigating menus & sub-menus.  
*Example:* I often set *Ctrl+R* to re-link images since I do that frequently.

## 3. Error-Free Design with Real-Time Preflight

- Define preflight profiles that match your printer and document requirements.
- Activate the correct profile when beginning a project (see *Preflight Panel*).
- Embed the profile in the document so that others can use it (*Preflight Panel: Button next to profile selection box*).

## 4. Use the Baseline Grid

- Good layouts always align the baselines of type in adjacent text blocks. The surest way to accomplish this is to define a baseline grid for the document (preferences: grids) and then having relevant paragraph styles snap to it (style dialog: Indents & Spacing: Align to Grid).
- When using the grid make sure your leading and spacing match your grid.
- Each document has only 1 baseline grid.
- If you cannot use the grid, keep the leading and paragraph spacing consistent and Set Text Frame baseline options to use leading (*Object: Text Frame Options: Baseline Options*).

## 5. Fit Your Type Perfectly

- If using justified type, edit the style's Justification options to optimize automatic fitting. Use both word and character spacing.
- Use style Keep options to keep headings with text (Keep with next) and prevent widows and orphans (keep 2+ lines at beginning and end of paragraph together).
- Use style Hyphenation options to disable hyphenation for headings and optimize hyphenation for body paragraphs.
- Use minor local tracking adjustments to avoid having single dangling words or avoid awkward column / page breaks.
- You can tell your preflight to ignore these tracking adjustments so they don't count as style override errors.

## 6. Lists with Multiple Levels

- Define separate lists for special purposes such as figure numbers, outlines, etc. (Type: bulleted & Numbered Lists: Define Lists).
- Set up styles referring to this list that set levels appropriately.
- For shorter, non-specialized lists no list definition is necessary. For numbered lists, make a style called "number first" that will reset numbering as needed.

## 7. Automatic Running Headers

- Define a text variable that will display the most recent use of a particular paragraph or character style (*Type: Text Variables: Define*).
- For headings I often use a character style that I name “Sets Running Head” rather than using the heading paragraph style—especially if the document has headings that are too long to be used as running heads. I just highlight the portion of the heading that I want to use as the running head and tag it with the character style.
- Insert the variable on your master page(s). The next time you use the specified style, the text using that style will appear wherever you inserted your variable.

## 8. Favorite Method to Import Word and RTF

- Before placing text set your body text style as the default.
- When placing, enable “Show import options” checkbox. Then choose the “Remove Styles and Formatting” button and the “Preserve overrides” checkbox.
- After placing the text do a Find/Change. Leave text boxes blank but search for overrides you wish to keep (such as italics, bold, etc) and tag them with character styles.
- Select all text in the story and click the remove overrides button at the bottom of the paragraph styles panel to get rid of any undesirable formatting, then apply other paragraph styles as needed.

## 9. Mass loading images into pre-sized frames (including pages of a PDF)

- Create an object style that specifies the frame fitting options to center the content and fill frame proportionately. Apply the style to all the frames that need images.
- Place multiple images at once or drag/drop from Bridge or Finder/Explorer. Images will be loaded into cursor; clicking on a frame will place the image and fill the frame with it.
- To place other pages of a PDF, show import options when placing.

## 10. Loving the Links Panel

- Edit the panel options. Show most important info, like effective PPI, in columns. Show less important info in the Link Info portion.
- Edit any image in any editor using *panel menu: Edit With*.

## BONUS: 10 Quick Tips

- Resetting your preferences to fix application problems: when launching hold: Mac: *Cmd+Ctrl+Opt+Shift*; Win: *Ctrl+Alt+Shift*.
- Just a few recommended preference settings: change Units to Inches, turn on Dynamic Spelling (underlines misspelled words in red), set Display Performance to high quality and set greeking to 0, display blacks accurately.
- Load styles & swatches from other documents (*Panel Menu: Load*).
- use your up & down keys to increase/decrease values in entry fields. You can also do math and unit conversions in any number field.
- *Cmd+Shift+Click* to override master items.
- use a “FIXIT” character style and color to mark problem spots for later attention. Use a color that breaks your preflight rules so that these show as errors, making them easy to find and to remind you to fix them.
- You can colorize flat gray raster images using the selection and direct selection tools to create duotones or make an image print with a spot color instead of black, etc.
- *Object: Text Frame Options* is one of the most useful dialogs that often gets overlooked. Get captions to ignore text wrap, vertically center text, align bottom baselines of text in frames, add insets inside a frame with a stroke on it, and even have multiple columns in a single frame.
- *Layout: Layout Adjustment* will allow changes to page size, margins, master page, etc. to affect your layout.
- Libraries are special InD files that consist of a panel into which you can drag and drop InDesign layout elements. These can then be placed into other documents simply by dragging and dropping.  
(*File: New: Library*).