

foreword by David Blatner

InDesign Type

Professional Typography
with Adobe InDesign CC

FOURTH EDITION

Nigel French

FREE SAMPLE CHAPTER

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InDesign Professional Typography with Adobe InDesign FOURTH EDITION Type

Nigel French



InDesign Type: Professional Typography with Adobe® InDesign®, Fourth Edition

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TABLE OF CONTENTS

Foreword	ix
Introduction	xi
CHAPTER 1 About Type	1
Type Choices	2
Type Anatomy and Classification	4
View the Page	16
Create a Typography Workspace	20
CHAPTER 2 Type on the Page	23
Text Frames	24
Text Flow	25
Text Threads	29
The Story Editor	38
Text Cleanup	40
CHAPTER 3 Type Choices	43
Text Selection Methods	44
Basic Character Formats	45
Typekit	58
Legibility and Readability	59
CHAPTER 4 Screen Typography	65
Types of Digital Publishing	66
Choosing Type for Screens	68
Preparing Type for Screens	72
CHAPTER 5 Leading	83
Leading Size	84
Avoid Auto Leading (Most of the Time)	88
Keep It Consistent, Except...	92
CHAPTER 6 Alignment	95
Horizontal Alignment	96
Vertical Alignment	110

CHAPTER 7	Letterspacing, Tracking, and Kerning	117
	Letterspacing vs. Tracking	118
	Tracking vs. Kerning	121
	Kerning	127
CHAPTER 8	Small (but Important) Details	133
	Special Characters	134
	White Space Characters	139
	The Glyphs Panel	142
	OpenType Features	146
CHAPTER 9	Paragraph Indents and Spacing	155
	First-Line Indents	156
	Hanging Indents	158
	Left and Right Indents	159
	Space Before and Space After	160
CHAPTER 10	Breaking (and Not Breaking) Words, Lines, Paragraphs, and Pages	165
	Hyphenation	166
	Break Characters	173
	Keep Options	177
CHAPTER 11	Tables	179
	Table Aesthetics	180
	Creating a Table	182
	Table Selection Methods	186
	Working with Rows and Columns	187
	Working with Table Cells	190
	Other Table Considerations	191
CHAPTER 12	Bullet and Number Lists	195
	Working with Lists	196
	Bullet Lists	196
	Numbered Lists	198
	Tabs	202
CHAPTER 13	Drop Caps	207
	Creating a Simple Drop Cap	208
	Drop Cap Aesthetics	210

CHAPTER 14 Combine Typefaces	219
Things to Avoid	220
Vive la Différence	220
It's a Family Affair	220
Go for Contrast	222
From the Same Stable	225
Historical Accuracy	225
Combining Characteristics	225
CHAPTER 15 Styles	227
Defining Our Terms	228
Why Use Styles?	228
Creating Paragraph Styles	229
Applying Styles	231
Editing and Adapting Styles	234
Character Styles	238
Object Styles	243
Table and Cell Styles	246
Features Related to Styles	248
CHAPTER 16 Type and Image	263
Text Wraps	264
Simple Type Effects	272
CHAPTER 17 Page Geometry, Grids, and White Space	285
Setting Up the Document	286
Master Pages	290
Setting Up Columns	296
Working with Grids	299
White Space	311
APPENDIX Type Checklist	317
Index	322

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Foreword

You're holding one of the most important InDesign books on the planet. That might sound audacious, but your ability to set type well in InDesign is a critical part of whether your work will be successful. After all, if you don't understand the fundamentals of professional typography, and how to apply them using the tools in InDesign, you're doomed to creating "blah" design. And no one wants to make blah design.

The good news is that design—and especially the design of text, called typography—is something that anyone can learn. It involves two steps: developing the *feeling*, and learning *how to* make type better. Having "the eye" (the feeling for type) leads to misery if you don't know how to handle the tools to change it. And understanding the software is meaningless if you don't know what you're looking for.

Fortunately, I'm pleased to say that this book can help you do both. I've known Nigel French for over a decade, and I can tell you that he is one of the top typography trainers in the world, specifically because he understands—and can communicate—the "feeling" and the "how-to."

In this new edition of Nigel's book, he delves even deeper and stretches even further into making type beautiful, for both print and interactive design. You'll enjoy reading it and learning from it.

Adobe InDesign is the industry's best tool for setting type in short and long documents. The more you know about InDesign, the more fun it is to use it, especially when you have a good teacher like Nigel.

—David Blatner
co-host, InDesignSecrets.com
founder, *InDesign Magazine* and
the InDesign Conference

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Introduction

Today we are all typographers. Everyone knows what a font is, and most people have an opinion about the fonts they like and those they don't. Typography is no longer an arcane trade plied by curmudgeonly men with inky fingers, but rather a life skill. We make typographic decisions every day: the material we choose to read in print and onscreen, the fonts we select for our correspondence, and the advertising we respond to, consciously or subconsciously. The fonts themselves are readily available—from long-established foundries with extensive catalogs and from boutique font houses with niche offerings, from subscription services like Typekit, and the countless number freely available from Google Fonts and many other online sources.

This democratization of typography is empowering; anyone can participate. But to participate well it helps to know a thing or two; with power comes responsibility. If you're using InDesign, then you have at your disposal the state-of-the-art software for creating typographic layouts of any length and complexity. It's worth bearing in mind that the concepts behind InDesign didn't just arrive simultaneously with the program's launch in 1999. InDesign is part of a continuum of technological advances going back to the 15th century with the invention of the printing press. The terminology and typographic conventions upon which InDesign is built have evolved over generations. The typefaces on our font menus—even the funky postmodern ones—are descendants of the letter shapes chiseled into the Trajan Column in Rome nearly 2000 years ago.

Designing with type is a subjective discipline, so it's useful for you to know where I'm coming from and why I'm advancing the opinions I am. I'd say that my type preferences are more "old school" than experimental, my style more conventional than boundary pushing. I admire graphic designers who break the rules of type and do it well; I groan when I see graphic designers breaking the rules and doing it badly. Unfortunately, too many graphic designers who break the rules fall into the latter camp.

Computers let us get away with stuff. It's all too easy for a half-hearted effort to look—at first glance—polished. But on closer inspection, we see that it lacks sensitivity to the type. There's scant attention to detail and little-or-no appreciation of the cues and messages that the type is sending.

With every passing month, it seems that more and more people are using more type and using it more creatively. But simultaneously, “type crime” are on the rise, and it feels like some of the foundations of typography are being sidelined, lost, or forgotten. The most frequent complaint of design instructors is that students lack sophistication in their use of type. Their layouts routinely feature flashy graphic explorations in Photoshop and Illustrator, but the typography is too often given short shrift, thrown on the page as an afterthought.

It's an oft-repeated adage that good typography is “invisible,” meaning that, rather than drawing attention to itself, typography should serve the words it represents. This perhaps makes typography sound like a thankless task. Where's the fame? The glory? There are few celebrity typographers, and those few walk the streets in relative anonymity. Nonetheless, typography is a noble cause. If typefaces are the bricks and mortar of communication, then we, the typographers, are the architects. A simple and understated building may pass unnoticed by many, but everyone notices an ugly one. Likewise with typography: Good designs serve their purpose and may not elicit comment, but we can all spot bad typography, even though we may not be able to say precisely why it's bad. *InDesign Type* exists to demonstrate the rules and conventions of professional typography, specifically as they relate to InDesign, so that we can avoid ugly and thoughtless type—which, I believe, is a major step in the direction of creating beautiful type.

Who Should Read This Book?

This book is about working efficiently in InDesign—getting familiar with its conventions and nomenclature, knowing its keyboard shortcuts (the important ones anyway), and taking advantage of its powerful global formatting and automation features. But it's not just a book about working with InDesign; it's also a book about typographic best practices. Although they continue to evolve, these practices were around long before InDesign—and will be around long after InDesign is forgotten and we're all using the new thing, whatever the new thing may be.

InDesign Type is not a beginner's guide to InDesign. Maybe you've been using InDesign since version 1.0 or maybe you're a novice user, but I'm assuming that you know your way around the basics of the program. Some of the information is elementary and will be old news to seasoned users, but there's also a deep exploration of InDesign's type-related features, a wealth of tips, tricks, and workarounds, and some good old-fashioned hacks.

This book deals with English-language typography — not because it's the most important, but because it's what I know. It's primarily concerned with the typographic conventions of magazine and book publishing, whether those books and magazines are intended to be read in print or onscreen. The techniques in this book will help you create layouts to a professional standard by following certain typographic “rules.” To this end, my approach is utilitarian rather than experimental. These rules are not intended to limit creativity, but rather are intended as a starting point. Learn the rules. Then, if you choose, break them — but break them consciously, knowing why you do so. Whatever you do, don't ignore them.

Regarding some technical issues, I should mention that although this edition of *InDesign Type* was written specifically for Adobe InDesign CC, most of the techniques in the book are applicable to earlier versions of InDesign. Where there is a keyboard shortcut for a command, I indicate the Mac shortcut first, followed by the Windows shortcut in parentheses. For example: Cmd+Option+W (Ctrl+Alt+W). My screenshots show a light gray interface (Preferences > Interface) because screenshots in the light gray reproduce better in print than those in the default, medium dark gray.

I hope you find *InDesign Type* a useful addition to your design bookshelf. I hope that, in some small way, by reading this book you'll be able to work faster and more decisively in InDesign and — most importantly — that your InDesign documents will look better because your type looks better.

If you enjoy the book, you might also be interested in viewing my “InDesign Typography part 1 and part 2” courses on [LinkedInLearning.com](https://www.linkedin.com/learning/nigel-french/in-design-typography-part-1) or [Lynda.com](https://www.lynda.com/nigel-french/in-design-typography-part-1), which are structured in much the same way as the book and use many of the same examples.

Please email me with any comments, corrections, or suggestions.

—Nigel French
nigel@nigelfrench.com

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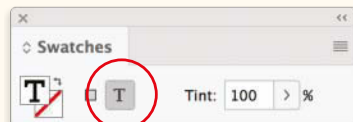
Chapter 3

Type Choices

This chapter looks at how and why to choose type and InDesign's basic character formatting options. Selecting a typeface and its treatment for a particular task is simple. Deceptively so. Your choice of typeface, its style and point size, and any casing options all contribute to — or detract from — the readability of your text. They should be conscious, informed choices. Discussing these options, we'll follow the order determined by the InDesign interface, an order that both reflects the logic of predigital typesetting and sets the agenda for how we work today. But we'll also look beyond the buttons and menus to discuss the historical precedents and time-honored conventions that are attached to such options.

Formatting Affects Text

As well as selecting a range of text, you can also select text on a frame-by-frame basis. This is useful if you want to apply the same formatting to all the text in a frame or multiple frames. With a text frame selected, choose the Formatting Affects Text icon on the Swatches panel or the bottom of the Tools panel. You can also press J to toggle back and forth between this and the default option, Formatting Affects Container. This approach lets you evaluate changes without the visual distraction of the text selection color. Note that you will need to apply the formatting through the Character panel, because the Control panel does not show text formatting options when a frame is selected with the Selection tool.



Text Selection Methods

Before we can format type, we must first select it. Here's a list of shortcuts for selecting text and moving within stories:

- Select one word: Double-click word
- Select one line: Triple-click line (depending on Text preferences setting)
- Select to beginning of paragraph: Cmd+Shift+Up Arrow (Ctrl+Shift+Up Arrow)
- Select to end of paragraph: Cmd+Shift+Down Arrow (Ctrl+Shift+Down Arrow)
- Delete one word to left of cursor: Cmd+Delete (Ctrl+Backspace)
- Delete one word to right of cursor: Cmd+Fn+Delete (Ctrl+Delete)
- Move to start or end of story: Cmd+Fn+Left Arrow or Right Arrow (Ctrl+Home or End)
- Select from the point of the cursor to the start or end of story: Cmd+Shift+Home or End (Ctrl+Shift+Home or End)
- Move to beginning of line: Fn+Left Arrow (Ctrl+Up Arrow)
- Move to end of line: Fn+Right Arrow (Ctrl+Down Arrow)
- Move one word to the right: Cmd+Right Arrow (Ctrl+Right Arrow)
- Move one word to the left: Cmd+Left Arrow (Ctrl+Left Arrow)
- Move to beginning of next paragraph: Cmd+Down Arrow (Ctrl+Down Arrow)
- Move to beginning of previous paragraph: Cmd+Up Arrow (Ctrl+Up Arrow)

Unfortunately, there's no way of selecting text one sentence at a time.

Basic Character Formats

This section looks at the basic character-level options of the Control panel.

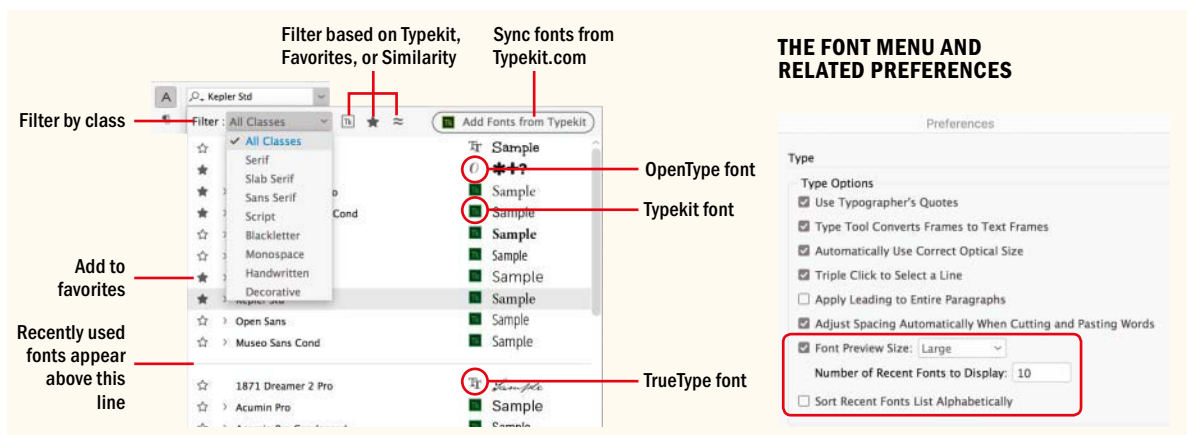
Font

To change the font of a selected range of text, use the Font field on the Control panel. To jump to the Font field when character formats are active, press **Cmd+6** (Ctrl+6), or just click in the Font field. From there, either click the **x** to clear the search field or select the existing font name and type over it the first few letters of the font you're after. You can also click the magnifying glass icon in the Font field to set the search preference to either **Search Entire Font Name** or **Search First Word Only**. This changes the results you get when you start typing a font name.

To move through the fonts on your menu, applying them to your selected text, press the **Up** or **Down** arrow.

You can change the size of the font previews (or turn them off completely) in Type preferences. The preview is nothing more than the word “Sample” rendered in the particular font. It's not especially useful. Type preferences is also where you can choose the number of recent fonts to display and whether to sort them alphabetically. Recently used fonts are displayed at the top of your Font menu—a list that stays active, even after you quit the program.

NOTE: These options are found both on the character formats of the Control panel and in the Character panel. It's a matter of preference which you choose to use. I prefer the Control panel, and the figures in this chapter reflect that choice.



Font Management


You can never be too rich or too thin or have too many fonts. To use that font collection effectively, however, you're going to need some organization. So as your font collection grows, you may want to invest in a font management utility. On the Mac, Font Book, which comes with macOS, lets you test, preview, and organize your fonts. You can create customized collections, as well as organize—and activate—your fonts by style, project, or client.


If you need more control, Suitcase Fusion, from Extensis (extensis.com), automatically activates your fonts in Creative Cloud apps, provides tools to fix common font problems, and offers integration with font services like Typekit and Google Fonts. FontAgent Pro, from Insider Software (insidersoftware.com), and FontExplorer X, from Monotype (fontexplorerx.com), offer a similar range of features at the same price, which at the time of this writing is around \$100.


The font menus of designers can be long and a time-suck to use, so it's useful that InDesign provides a number of time-saving filters. As well as the ability to filter the font list by style—Serif, Sans Serif, Script, etc.—you can also filter by Typekit fonts, by “favorites” that you have starred, and by similarity to your currently selected font.

The Font menu is organized by language. After the fonts with western character sets, you will see a list of Japanese fonts, traditional Chinese fonts, simplified Chinese fonts, and Korean fonts. Following these are Arabic fonts and Hebrew fonts.

The following icons are used to indicate different kinds of fonts:

 OpenType

 Typekit (these too are OpenType but are “synced” and the actual font files stored in a hidden folder on your computer)

 TrueType

 Type 1

Sometimes fonts, usually free fonts of dubious provenance, are prone to errors. This is not to besmirch free fonts—there are many good ones out there—but rather a commonsense reminder that you get what you pay for. If you plan on using a free font in your layout, make sure to road-test it before the project deadline.

OpenType is the font file format preferred by most graphics professionals. A single compact file contains both the printer outlines and the bitmap screen information. The printer outlines in an OpenType font can be in either PostScript format or TrueType format. Those with PostScript outlines have the .OTF extension, while those with TrueType outlines have the .TTF extension. OpenType fonts are cross-platform compatible, and offer the potential of up to 65,000 glyphs in one font. In reality, many have the same 228 glyphs you'd find in a Type 1 PostScript font. OpenType fonts may have either *Std* or *Pro* appended to their name. Std means the font contains the standard range of Latin characters. Pro means that the font contains additional characters for working with other languages, as well as such typographic niceties as real small caps, extra ligatures, and different numbering styles.

Handling Missing Fonts

Sometimes when you open an InDesign document, especially a document created by someone else, you see an alert that fonts are missing. If the document contains unsynced Typekit fonts, the Find Font dialog appears, giving you option to sync those fonts. Assuming you have an internet connection, have a Creative Cloud subscription, and have not reached the maximum number of fonts you can sync from Typekit, after a short pause the fonts will be synced.

Missing fonts are indicated in your layout with pink highlighting; they are listed on your font menu in square brackets. Ideally, you can install the correct fonts. If this isn't practical, you can choose Type > Find Font to replace the missing fonts with fonts you have installed.

Select Redefine Style When Changing All to ensure that paragraph and character styles will be redefined to use the new font — assuming, that is, that styles have been used. If you don't use this option, you'll end up changing the font on your pages, but it will linger inside the style definition and likely pop up when you least expect it.

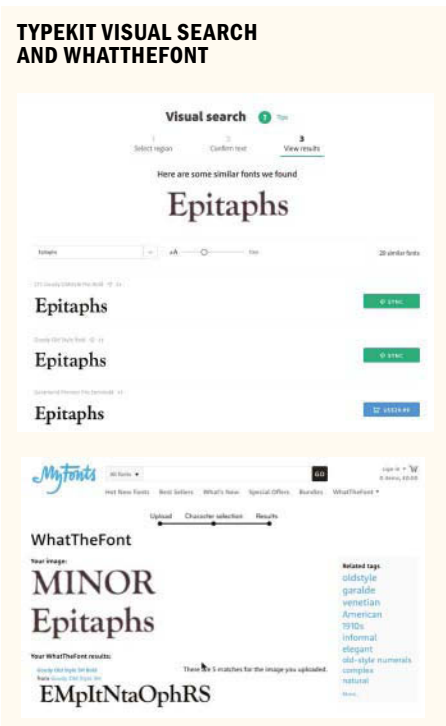
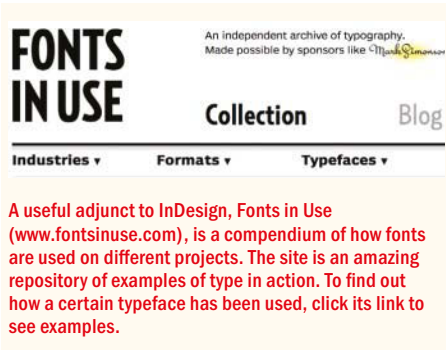
To avoid missing fonts when you pass your job on to someone else — or just move it from one machine to another — make sure the project is packaged. Choose File > Package, click the Package button, and then select the Copy Fonts check box (as well as the Copy Linked Graphics box) to have InDesign collect the fonts in a folder inside the project folder. Note that Typekit fonts can't be packaged, however. If you're passing on the document to colleagues, they too must have a Creative Cloud subscription so that the fonts can be synced. Chinese, Japanese, and Korean fonts (CJK) can't be packaged either.

NOTE: The pink highlighting can be turned off in your preferences. Choose Preferences > Composition > Highlight Substituted Fonts.

TIP: Find Font is not limited to replacing missing fonts. It's also the quickest way to change one font to another throughout your document — just make sure to have Redefine Style selected when you do so.

Font Styles

Having a choice of different type styles — like bold or italic, for instance — within the same typeface family lets you indicate hierarchy and emphasis, while at the same time maintaining stylistic continuity. InDesign won't allow you to apply "faux" bold or italic font styles; there's no B or I button to make the text heavier or slanted. Both styles can be faked in other ways, but you have to be desperate to want to do so. Instead, choose the italic or bold weights of that typeface from the Font Style menu. You can also use the shortcuts Cmd+Shift+I (Ctrl+Shift+I) or Cmd+Shift+B (Ctrl+Shift+B) — if a font doesn't have a bold or italic version, the text doesn't change.



Normal/Regular/Roman

Numerous terms are used to describe the styles within a typeface. Type that doesn't slant is referred to as *roman*. This "normal" style is usually called *regular*, but in certain typefaces may be called *book* or *medium*. The terms *italic* and *oblique* both refer to slanted type, the latter employed in some sans serif typefaces. Terms like *light*, *semibold*, *bold*, or *black* refer to the font weight and are self-explanatory; other, lesser-used terms to describe font weight are *heavy* and *extra bold*. The terms *condensed* and *extended* refer to character width.

The most important type choice you'll make is your body text, which will be in the "normal" style. Body text makes up most of any document, so the look of the body text is of paramount importance. Here are some things to consider:

- **Your body type should be trustworthy and unobtrusive.** These are qualities best served by typefaces with conventional letterforms. Novelty slows comprehension; letters with excessive ornamentation or quirky design elements force the reader to process what they are looking at first—"Wow, look at that cute g"—before taking in the message.
- **Body text should be easily readable at small sizes.** Typically this means choosing a typeface with a tall x-height. A tall x-height makes it easier to distinguish between similar lowercase letters, like "a," "c," and "e."
- **Although it's not a cast-iron rule, serif fonts are more common for body text in print.** Pick up any book, newspaper, or magazine and there's a more than 50 percent chance it has

Identifying Type

See a typeface that you like but don't know its name? There are several online services that help you play font detective.

Visual Search from Typekit uses Adobe Sensei's machine-learning technology to identify a font and suggest similar typefaces on Typekit. You upload a photo of lettering or type, and Visual Search will return a list of similar typefaces on Typekit.

WhatTheFont (from MyFonts.com) and the **Font Matcherator** (from Fontspring.com) work in a similar way.

Identifont (www.identifont.com) takes a different approach, drilling down to the font's identity by asking a series of questions, such as: Does the font have serifs? What style is the uppercase Q tail?

a serif font for the body text. In screen publications, body text can be sans serif or serif. Sans serifs were once preferred for screen type because they look crisper on low-resolution displays. Screens have come a long way in recent years, however, and today serif fonts look equally good.

- **Research the attributes and connotations of prospective typefaces.** Does the family have italic and bold variations, and are there enough weights and styles for the job in hand? Is the typeface designed for print or screen? Is its history congruent with the subject matter of the text? If you're in doubt, a quick browser search will give you some background information about the typeface.
- **As well as identifying the physical characteristics of the typeface, consider too any baggage that comes with it.** Default choices like Times or, sadly these days, Minion can connote laziness. Which is not to say that you can't create great-looking designs with these fonts, but rather that you're starting on the back foot and you'll have to work harder to make them look like conscious and informed choices.

Italics

Italic type styles—so named because they evolved in Italy—are designed to complement their roman siblings. Most fonts come with a matching italic. The company that developed InDesign's predecessor, PageMaker, took the name Aldus after Aldus Manutius (c. 1449–1515), a Venetian printer who was the first to use italic type in the early 16th century.

Italics are separate fonts in their own right, not just slanted versions of the roman. When they were first used, they were considered distinct from the roman forms. Over time, printers began pairing italics with romans of the same weight and x-height, but italics retain their identity through narrower proportions and unique letterforms.

Italics have the following uses:

- Emphasis.
- Foreign language words or phrases, except those words that are in such common usage as to not require distinction; for example, cliché, elite, genre. Such conventions shift over time, so check the dictionary for clarification.

Variable Fonts

This exciting new font format allows you to customize styles within a typeface design—effectively giving you a whole font super family in a single file. You can change weight, width, and slant, as well as optically size. For veterans who remember multiple master fonts, it's like that, only better. At the time of this writing there's no support for variable fonts in InDesign or Typekit, but that's bound to change, as they are now available in Adobe Photoshop and Illustrator. You can view a demo video here: <https://youtu.be/bD6BSjl-xfw>.



Using the Weight and Width sliders to adjust the style of a Variable font in Illustrator

ITALICS

There's more to italics than just a slant — the letterforms are completely different from the roman. Below, compare the difference between real italics and slanted roman.

when a long train of abuses and usurpations, pursuing invariably the same Object evinces a design to reduce them under absolute Despotism, it is th

when a long train of abuses and usurpations, pursuing invariably the sa Object evinces a design to reduce them under absolute Despotism, it is their

- The titles of films, books, magazines, or works of art.
- In written dialogue to indicate that the conversation is thought, rather than said, by the character.

Avoid setting long passages in italics. The calligraphic flow of italics makes the type look hurried; or perhaps the characters, being more decorative, attract too much attention. If they're overused, the uniqueness of italics is lost.

When working with serif typefaces, consider increasing the size of the italics by about half a point (for ease and consistency this should be incorporated into a character style—see Chapter 15). This is an optical issue—with the roman and italic at the same size, the italics often *look* smaller—though of course this depends on the typeface.

If you're using a typeface without an italic and you really need an italic version for emphasis, but you're wedded to that particular typeface, you can, in a pinch, fake italics by using the slant option to give the type an angle of 12 degrees. Don't say I didn't warn you—fake italics look cheesy.

It's common for sans serif families to have an oblique, rather than italic, style. Oblique types are slanted versions of the roman characters rather than separately drawn letter forms. If you're working with such a typeface family, consider using bold rather than italic to give emphasis, as obliques lack the grace and calligraphic quality of true italics.

When using italics (or any other method) for emphasis, any punctuation that follows should be in the same style.

Bold

Bold weights are typically applied to headings and subheads to establish hierarchy. It's also common in newspapers and magazines to distinguish supporting text like sidebars, captions, and pull quotes by using a bold or semibold weight.

In larger typeface families, there may be relative weights of boldface, with names like semibold, black, extra bold, and super. Given the option of several weights within the same family, it's preferable to differentiate by two weights to achieve the desired contrast. For example, pair regular with bold, or light with semibold; a regular paired with a semibold will look too similar and will not provide sufficient contrast.

COMBINING DIFFERENT WEIGHTS WITHIN A TYPEFACE FAMILY

Regular with Bold

Light with Semibold

Regular with Semibold.

In the top two options the weights are clearly differentiated; in the last, they are too similar.

The use of bold as opposed to italics for emphasis is a style issue. If you opt for bold, use it sparingly. Because bold type is more commanding than italics, too much bold on a page can be distracting and even disruptive to the reading process. If everything is emphasized, then nothing is emphasized. Bold text can break up the continuity of the type and set an overly didactic tone. The eye will jump to the text called out in bold rather than discover the emphasis as part of the reading, as with italics, which blend in better with the roman type.

From a historical perspective, the use of boldface may undermine the authenticity of a page, because prior to the 19th century there was no such thing as bold roman type, printers relying instead on small caps or italics for emphasis. As Robert Bringhurst puts it in his landmark book *The Elements of Typographic Style*, inappropriate use of boldface can “create unintentional anachronisms, something like adding a steam engine or fax machine to the stage set for *King Lear*.”

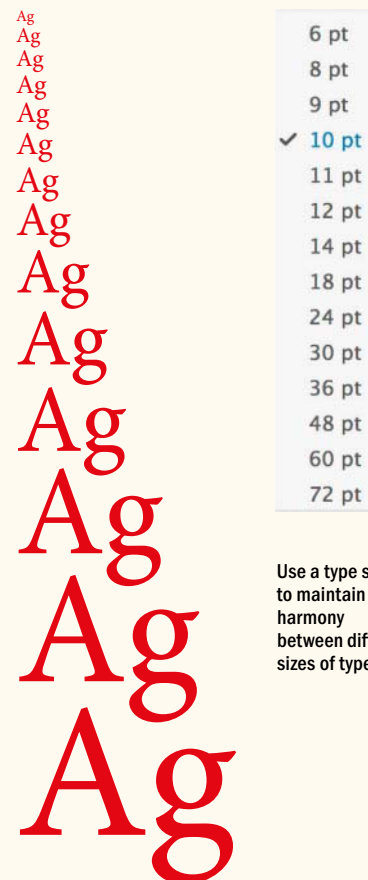
Font Size

As well as sizing type with the Control panel, you can use keyboard shortcuts: Cmd+Shift+> (Ctrl+Shift+>) increases the size by the increment specified in the Units and Increments preferences for Size/Leading. Cmd+Shift+< (Ctrl+Shift+<) reduces point size by the same increment. Add Option (Alt) to this key combination, and you can increase or decrease your point size by five times the specified increment. Pressing Cmd+> (Ctrl+>) scales the frame and the type at the same time. The type is scaled relative to the text frame, rather than by the increment specified in the Units & Increments preferences.

If you're working with a short piece of type that's not part of a threaded story, it's often easier to scale the type and the frame together. To do this, drag out a text frame with your Type tool, then type your text. If your frame is bigger than necessary to accommodate the text, click the Fit Frame to Content icon on the Control panel, press Cmd+Option+C (Ctrl+Option+C), or double-click the lower-right handle of the text frame to fit to the text. To scale the type by eye while maintaining its proportions, hold Cmd+Shift (Ctrl+Shift) as you drag from one corner of the frame. You can also use the Scale tool or the Free Transform tool to size the frame and its contents.

EMPHASIS

There are NUMEROUS ways to give emphasis. Making words **bold** or *italic* are the most common, but using **color** or a **highlight** can also be effective. Whichever method you choose, you need only one way to signify difference. For example, it is redundant to use **bold and italic** or **bold and a color**.

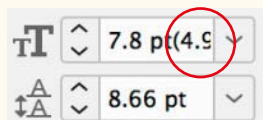
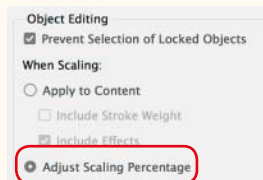


Use a type scale to maintain harmony between different sizes of type.

Font Size in Parentheses

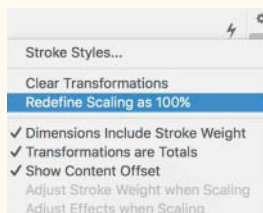
By default, if you scale a frame, the text inside is also scaled. If you double the size of a text frame, the text size also doubles, so 20-point text increases to 40 points, for example.

There's an ill-advised preference that changes this behavior. If you choose **Adjust Scaling Percentage**, the **Font Size** field displays both the original and the scaled size of the text, such as "20 pt (40)."



The purpose of this option is so users can monitor scale changes to frames — potentially useful if you have to revert a frame and its text to its original size. In practice, however, it just confuses people.

If you inherit a document with font sizes in parentheses, reset this preference to **Apply to Content**. To see the "real" sizes of your type, select the frames, then choose **Redefine Scaling as 100%** from the **Control** panel menu. Choosing this option doesn't change the appearance of the scaled frame.



Common Text Sizes in Print

Body text or **body copy** is the type (typically in sizes between 8 and 12 points) that makes up the majority of a book or article and carries the bulk of the message. Typefaces designed for such a purpose — referred to as text typefaces — need to have letterforms that are effortlessly recognizable and so tend to have open counters, large x-heights, rhythmic and repetitive shapes, and a medium weight.

When choosing the size of your body text, you can probably go smaller than you think. Text that is too large looks amateurish and clunky. While 12-point type is InDesign's default type size — and looks about right on screen — it will probably look too big in print. Start out with 10 point, then increase or decrease the size as necessary according to the characteristics of the font and the needs of your audience.

Display type is the big type (typically 18 points and above) whose primary purpose is to be seen; it's the bait that lures the reader. Display type is designed to grab attention and relies on a unique, sometimes showy form to announce and amplify the message of the text. Text type can function as display type by making it bigger, but it seldom works the other way around. It's also worth mentioning that while size usually indicates the type's intent, this is not always the case. For example, an understated headline can sometimes attract attention by being unexpected.

Subheads allow a story to be broken down into bite-size chunks that are more visually enticing than a mass of undifferentiated paragraphs. They provide visual relief and interest, as well as acting as signposts throughout a book or article. Subheads may be the same size as the body text but be distinguished by a different font or weight, or they may be a point or two bigger.

Captions help interpret an image or figure and are usually set a point or two smaller than the body text. In our busy world, it's the captions that the tentative reader reads before engaging fully with the body copy or moving on.

Casing

Whereas capital letters evolved from the Romans, it wasn't until the end of the 8th century that anything like lowercase letters were used. Credit for their invention goes to Alcuin of York (c. 735–804), Charlemagne's leading adviser on ecclesiastical and

educational affairs, who oversaw the standardization of ecclesiastical texts. With the invention of the printing press in Europe around 1450 (though it existed earlier in both China and Korea), the terms *uppercase* and *lowercase* were adopted from the wooden type cases used to hold the movable type. The top case was for the majuscules, the bottom case for the minuscules. Today, most fonts come with both uppercase and lowercase letters, but some are *unicase*, or *unicameral*. Trajan, by Carol Twombly (1959–), for example, comes only in uppercase, while Bayer Universal, by Herbert Bayer (1900–1985), comes only in lowercase—in fact, Bayer, a leading figure in the Bauhaus, advanced the idea of doing away with uppercase letters altogether.

All Caps

Continuous text set in unicasel can be challenging to read. Text in all caps, for example, is less readable than text in upper- and lowercase because the word shapes all look alike and are differentiated only by their length. We recognize words as shapes—it's the descenders and ascenders of lowercase text that allow us to instantly identify letters. Also, text in all caps tends to look disproportionately large when set among upper- and lowercase text; hence the need for small caps. Just as shouting doesn't make your message any clearer, setting text in all caps doesn't make your message any more compelling. At the other extreme, continuous text set all in lowercase makes it harder for the reader to distinguish one sentence from another and is really only appropriate if you are k.d. lang, bell hooks, or e. e. cummings.

Nonetheless, all caps can be effective in headlines and subheads. Because there are no descenders, be sure to tighten the leading (line spacing). With a serif font in all caps, you may want to loosen the letterspacing for a sophisticated and understated look; for an all-caps sans serif font at display sizes, consider tightening the letterspacing for a denser, more solid look.

MONOCASED TYPEFACES

THE GREATEST SHOW ON EARTH

Trajan Pro

graphic design
architecture
interior design

P22 Bayer Universal

What light through yonder window breaks?



WHAT LIGHT THROUGH YONDER WINDOW BREAKS?



WORD SHAPES

The shapes made by the ascenders and descenders of the upper- and lowercase type make the text more identifiable, whereas text in all caps makes word shapes that are basically identical.

“To remain nameless and without specific appreciation, yet to have been of service to a valuable work and to the small number of visually sensitive readers—this, as a rule, is the only compensation for the long, and indeed never-ending, indenture of the typographer.”

—Jan Tschichold (1902–1974), from
The Form of the Book

If the text has been typed in lowercase or sentence case, you can easily convert it to all caps by using the shortcut Cmd+Shift+K (Ctrl+Shift+K). InDesign doesn’t replace the characters themselves but changes how they appear and print. As far as the spell checker or Find/Change are concerned, the text remains as it was. Alternatively, you can choose Type > Change Case, which does change the text. Unfortunately, the Change Case options are very easily tripped up. For example, Title Case capitalizes the first character of each word in the selection, even prepositions and articles. Converting text that has been typed in all caps to sentence casing is even more hit-and-miss: InDesign interprets any period, question mark, or exclamation point as the end of a sentence. This causes unexpected case changes when these characters are used in other ways, as in abbreviations, file names, or URLs.

House styles vary when it comes to the casing of chapter headings, headlines, and subheads. *Up style*, in which every major word is capitalized, is the most common approach. With *down style*, only the initial cap and proper nouns are capitalized. Down style has the obvious editorial appeal that no one has to agonize over whether a word is a “major” word and thus needs to be capitalized. Another advantage is that since more words appear in lowercase, there are more familiar word shapes. (This book uses up style heads due to Peachpit’s style guide.) A third approach, commonly used for product names, is *camelcase*, in which compound words or phrases are written without spaces and the first letter of each compound is capped; for example, PlayStation, PageMaker, and of course ... InDesign.

If I may gripe for a moment, I don’t know why in 2018 we can’t include title casing as part of a paragraph style or character style. If memory serves, Ventura Publisher (may it rest in peace) had this option circa 1988. Take this a step further and you could exclude

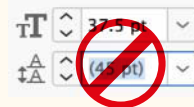
**ONE SMALL STEP FOR MAN;
ONE GIANT LEAP FOR MANKIND**

**ONE SMALL STEP FOR MAN;
ONE GIANT LEAP FOR MANKIND**

ALL CAPS LEADING

⚠ Auto Leading results in the lines of the headline being too far apart. The height of the space between the lines (1) is significantly bigger than the width of the space between the words (2).

⚠ The type is set solid, i.e., the leading is the same as the point size. This creates a cohesive look for the headline, where the leading is only slightly bigger than the word space.



articles and prepositions for down-style casing. This would make the styling of headlines and subheads faster and more consistent. Of course, it wouldn't be foolproof, but it would cut down on the drudgework. As an InDesign user, you make feature requests at the InDesign UserVoice page: <https://indesign.uservoice.com>.

Small Caps

Small caps are only as tall as the x-height and so do not, like regular caps, overwhelm the upper- and lowercase type they appear alongside. Small caps are mainly associated with serif typefaces and are nearly always roman. Small caps have the following uses:

- Acronyms, initialisms, and historical designations such as BC and AD—preferably without periods, though house styles differ
- To transition from a drop cap to the regular body text
- For abbreviations like AM and PM—with no letter spaces or periods, though it's more contemporary to use lowercase: 3pm, 7pm, and so on
- The names of speakers in plays

If you're using a font that lacks real small cap characters, your small caps will be regular caps scaled to the percentage specified in the Advanced Type preferences. Because the weight of their strokes is reduced along with their height, these software-generated or “fake” small caps appear too light when set alongside other text at the same size. My advice is to avoid them. There are other ways to give emphasis.

Real small caps, on the other hand, are distinct characters that have been designed with their weights the same as the full-size text.

Small caps imply that the first character of the word is going to be a regular cap and therefore bigger than the rest. This needn't be so. Choose OpenType All Small Caps to have all characters the same size—at the height of the x-height.

Superscript (Superior) and Subscript (Inferior)

Superscript is typically used for ordinals in numbers or for footnotes. Subscript is used for scientific notation. In Advanced Type preferences, you can change the size of superscripts and subscripts—expressed as a percentage of the full-size capitals—as well as their position relative to the baseline. My preferred settings

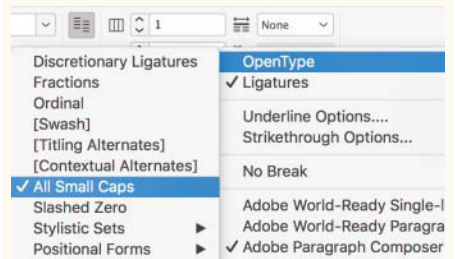
SMALL CAPS

NATIONAL DISGRACE

“Fake” small caps at 70% of the full capitals. Notice the lighter stroke weight.

NATIONAL DISGRACE

OpenType small caps



HISTORIC PROPORTIONS

Normal Small Caps

HISTORIC PROPORTIONS

OpenType All Small Caps

Glyph Positioning

With display type in all caps, the positioning of hyphens, dashes, and parentheses may require adjustment. Hyphens are centered on the x-height, which is appropriate for lowercase letters but too low for capitals. Hyphens, dashes, and parentheses may need to be adjusted with baseline shift.

Among the many benefits of OpenType fonts—and InDesign's support for them—is that this glyph positioning happens automatically. Some OpenType fonts adjust the position (or even shape/size) of some glyphs in all-caps situations. If you format an OpenType font as all caps, the surrounding hyphens, dashes, parentheses, braces, and brackets all shift vertically. Note, however, that this happens only when you choose All Caps character formats, not when you key in text with Caps Lock on.

SUPERSCRIP, SUBSCRIPT, SUPERIOR, AND INFERIOR

April 1st Superscript

April 1st OpenType Ordinal

H₂O Subscript (position 20%)

H₂O OpenType Inferior

SUPERIOR AND INFERIOR NUMBERS

Note the differing baseline positions.

	<small>numerator</small>		<small>superior</small>	
2	2	2	2	2
<small>lining number</small>		<small>denominator</small>		<small>inferior</small>

complicit

complicit

UNDERLINING

In the top example, using default settings, the underline slices through descender to create an ugly result. This can be somewhat improved by adjusting the weight and offset of the underline as well as adding a background color stroke to the outside of the text.

are 60% for the size of both. The superscript position I leave unchanged, but I change the subscript position to 20%.

As with fake small caps, the problem is that you're reducing not just the vertical scale but also the horizontal scale. The result is that the characters look too light and too narrow when set alongside full-size characters.

With OpenType faces, rather than use the Superscript and Subscript buttons on the Control panel, choose Superscript/Superior or Subscript/Inferior from the OpenType flyout menu. In most cases, ordinals and superscript/superior are the same thing. These are distinct glyphs with a stroke weight the same as that of the upper- and lowercase text. Superior figures are used for footnotes and formulas. They are the same as numerators used in diagonal fractions, but with a higher baseline. Inferior figures sit below the baseline and are used in chemical formulas. They are the same as denominators used in diagonal fractions but with a lower baseline.

Underline

In days of yore, when records came on vinyl and people typed on machines called *typewriters*, underlining was *de rigueur* for adding emphasis—but that was only because typewriters couldn't do it any other way. Underlining, as every type primer will tell you, should never be used for emphasis. The underline is too heavy, collides with the descenders, and insists on applying itself to the spaces in the selection. On this last point, if you want the underlines to break at spaces in the text, you can use Find/Change to find a space in the selection with Underline turned on, then replace it with a space with Underline turned off. But unless your design unequivocally calls for this treatment, you're better off choosing another way to give emphasis.

With the web, underlining got a new lease on life when it was adopted as the conventional way to indicate hyperlinks. If you're using underlining for this purpose, be sure to change the weight, the offset, and possibly the color of the line in Underline Options. They will still look ugly, but less so.

Underlines work best when they don't look like underlines. By adjusting the weight, offset, and color of the underline, it's possible to apply "highlighting" as a character style. (See Chapter 15, "Styles," for more on creating character styles.) Select the Overprint

Fill check box if you're applying highlighting to any color of text other than black, to avoid the need for trapping in professional print projects.

Strikethrough

Strikethrough is used to indicate which text will be deleted as a document moves through revision cycles. If you tweak the Strikethrough Options, the strikethrough could potentially be used as a second underline.

Baseline Shift

Baseline shift — Option+Shift+Up Arrow or Down Arrow (Alt+Shift+Up Arrow or Down Arrow) — is used to vertically shift the selected characters relative to the baseline of the type. It should not be used to adjust spacing between paragraphs, which should be controlled by Space Before and Space After.

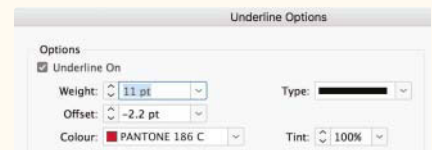
Baseline shift can be used for the following:

- Adjusting the position of bullets, ornaments, inline graphics, and such symbols as @, \$, °, ©, ™
- Adjusting the position of a decorative drop cap
- Manual fractions (although it's preferable to use a fraction script or, better still, an OpenType Pro font with real fractions)
- Monetary amounts where the size of the currency symbol is reduced
- Mathematical or chemical formulas
- Adjusting the position of parentheses, braces, and brackets — all of which center on the lowercase x-height, relative to the type they enclose. When used with all caps, they should center on the cap height. (OpenType fonts make using baseline shift unnecessary because of their ability to glyph shift — that is, adjust the position of certain characters, like opening and closing parentheses, according to whether they are preceded or followed by an upper- or lowercase character; see “Glyph Positioning.”)
- Creating type that looks like the thing it is describing
- Adjusting the baseline of a type on a path, particularly around a circle

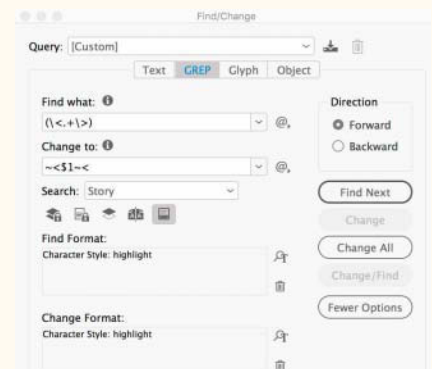
Climate change is caused by factors such as biotic processes, variations in solar radiation received by Earth, plate tectonics, and volcanic eruptions. Certain human activities have been identified as primary causes of ongoing climate change, often referred to as global warming.

UNDERLINING APPLIED AS A CHARACTER STYLE TO INDICATE HYPERLINKS

text highlighted with an underline



Underlining applied as a highlight



A shortcoming of using underlining in this way is that the highlight doesn't extend beyond the text on the sides. While there's no way to specify padding either side in Underline Options, it can be achieved with GREP. The GREP expression above finds any number of characters in the Highlight character style [.+] between the start of a word [\<] and the end of a word [\>], and adds a thin space before [~<], and after [~<] the found text [\$1].

SOME USES OF BASELINE SHIFT

(415) (415)

Parentheses shifted up around telephone area code, right

\$10.99 \$10⁹⁹

OpenType Superior and Baseline Shift applied, right

CAROUSEL

Interpreting a word

C all me Ishmae C all me Ishmae
precisely—hav precisely—hav
nothing partic nothing partic
would sail about a li would sail about a li

Drop Cap baseline shifted up to avoid collision

BASELINE SHIFT

BASELINE SHIFT

Shifting type on a path to the outside of the circle

NOTE: If you're working with equations and there are just a few, you can use a typeface like Mathematical Pi in conjunction with baseline shift and tabs. If the document contains many equations, consider a third-party plug-in like MathTools, available from <https://movemen.com>. The InDesignSecrets website has a discussion of different approaches to formatting equations: <http://indesignsecrets.com/typesetting-math-in-indesign.php>.

Condensed and Extended Type

The Character Formatting view of the Control panel has controls for changing the horizontal and vertical scale of your type. Most of the time these controls are best avoided. Choose real condensed or real expanded typefaces rather than try to fake them by adjusting the horizontal or vertical scale. Faking a condensed typeface (squeezing the horizontal scale) or an expanded typeface (stretching the horizontal scale) makes the character shapes look puny and the overall effect amateurish.

Condensed type is useful when you have a lot of text to fit into a finite space; extended type can fill a defined space with a relatively small amount of text.

Condensed faces can make for more impactful headlines. Because the characters occupy less horizontal space than a regular typeface, you can increase the type size and occupy more vertical space.

Condensed faces are also useful for tabular material where the space inside each cell is cramped.

Extended faces may be used for display type, and are more likely to be sans serif—like Helvetica Neue Expanded or Univers Extended.

Horizontal or vertical scale controls are sometimes useful when using picture fonts, like Zapf Dingbats or Wingdings, so that you can turn circular bullets into ovals, turn squares into rectangles, or create taller triangles or longer arrows.

Typekit

Typekit is Adobe's font subscription service that offers a curated selection of high-quality fonts from reputable foundries. To add Typekit fonts via Typekit.com, select Add Fonts from Typekit from the Font menu or Type menu. The browser interface helps you make informed type choices. You can specify the class of typeface you're looking for as well as its properties and drill down to a short list of candidates. Once synced, the fonts show up on your font menu.

Not all Typekit fonts are syncable. Some are web fonts and some require purchase, but a good (and growing) selection of fonts is available as part of your Creative Cloud subscription.

Man Bites Dog

Franklin Gothic URW Demi 53 pt

Man Bites Dog

Franklin Gothic URW Condensed Demi 62 pt

Man Bites Dog

Franklin Gothic URW Extra Compressed Demi 100 pt

Condensed and Compressed typefaces can be more impactful within the same horizontal space.

A Typekit font looks and behaves like any other and can be printed as well as embedded in a PDF or fixed-layout EPUB. The one limitation is that they cannot be included as part of a package. The font files themselves are renamed and hidden from the user. This means that if you're using Typekit fonts in an InDesign document that you share with a colleague, they too will need a Creative Cloud subscription to sync the fonts on their machine. But then again, they'd need that subscription just to open your files with the current version of InDesign, so this isn't as much of an obstacle as it might seem. Another issue that gives some users pause is that of archiving. Because you can't package Typekit fonts, you can't store your own complete archive of a project, which means you can't let your Creative Cloud subscription lapse if you want to work with documents that use Typekit fonts in the future.

Legibility and Readability

The related concepts of legibility and readability determine the effectiveness of your typography. *Legibility* refers to how easily we can recognize a typeface. Specifically, how easy it is to discern the letters and distinguish them from each other—as in an eye exam. Legibility is the responsibility of the typeface designer. The typeface designer crafts the shapes, details, and negative space of

SQUEEZED VS. CONDENSED

AA AA

Regular left alongside squeezed

Regular alongside real condensed — note how the stroke widths are maintained

EXTENDED TYPEFACES

GRILL

L I V E L O B S T E R

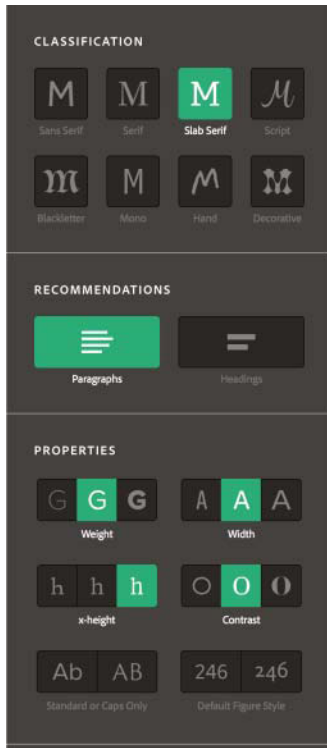
SEAFOOD

F R E S H F I S H

Blackoak

NARCISSIST

HWT Roman Extended



Typekit filters allow you to search for fonts by class, recommendations, properties, and language support (not shown). In this example, I am searching for a slab serif suitable for body text with a medium weight, standard width, high x-height, and medium contrast.

“A few hundred years of type and typography have established rules that only a fool would ignore.”

—Eric Spiekermann

the letterforms, which in turn determine how these letters combine to make words and sentences.

Readability refers to the ease with which we comprehend text by recognizing words and phrases as shapes. It is the product of how the type is set and is the responsibility of the typographer. It is the typographer who, guided by typographic rules, chooses the type, its size, leading, color, column width, and so on, to create readable type. This means putting the reader first and leaving your ego behind—or at least confining it to a first draft. The design of your body copy, it is said, should be “invisible.” If no one notices your type, you’re doing a good job.

This might make the designer sound undervalued, but while readers may not notice *good* typography, they will certainly notice *bad*.

This view of designer as self-effacing craftsman in service of the message is not universally held. Part of the appeal of grunge typography, so popular in the early 1990s, was that it celebrated rather than dampened the designer’s subjectivity. The results were, by conventional standards, often unreadable, relying instead on the visual impact of the type to convey the meaning of the text.

Personally, I believe “the rules” of readability are a good starting point. Once learned, they can be upheld or disregarded as you see fit. But as the saying goes: Learn the rules first before you start breaking them. If you feel like making your type “invisible” is taking things too far, then aim for your type to not call too much attention to itself.

Not all typefaces are—or should be—created for readability. Many decorative faces aim to create a mood or make a design statement. Some are deliberately challenging in terms of their readability and are arguably more, not less, legible for that. They exist to grab attention rather than to be read continuously. It’s interesting that type can be legible without necessarily being easily readable.

However, the opposite is not true: Type cannot be readable without first being legible. Sure, you can improve the readability of a hard-to-read typeface, but if it’s illegible, it’s always going to be hard to read.

In most cases, communication comes before style. Readability is our goal, so start with a legible typeface. But there are some twists. For example, not all type is intended to be readable. A cynic might

One morning, when Gregor Samsa woke from troubled dreams, he found himself transformed in his bed into a horrible vermin. He lay on his armour-like back, and if he lifted his head a little he could see his brown belly, slightly domed and divided by arches into stiff sections. The bedding was hardly able to cover it and seemed ready to slide off any moment. His many legs, pitifully thin compared with the size of the rest of him, waved about helplessly as he looked.

Adobe Jenson Pro

One morning, when Gregor Samsa woke from troubled dreams, he found himself transformed in his bed into a horrible vermin. He lay on his armour-like back, and if he lifted his head a little he could see his brown belly, slightly domed and divided by arches into stiff sections. The bedding was hardly able to cover it and seemed ready to slide off any moment. His many legs, pitifully thin compared with the size of the rest of him, waved about helplessly as he looked.

Open Sans Regular

READABILITY

The 15th-century (Jenson) versus the twenty-first (Open Sans). Is one more readable than the other?

cite legal small print or terms and conditions text as examples of typography where readability is deliberately compromised. There have also been studies that prove that using ugly fonts in an educational environment can improve cognition — presumably because they are more memorable. I think this is fascinating, but there’s enough ugliness in the world without us adding more.¹

Serif vs. Sans Serif

The conventional wisdom is that in print, serif typefaces are more readable for body text than are sans serif faces. If we buy into this assumption, what’s the reasoning? Perhaps it’s because the serifs function as rails, guiding your eye along the line. Perhaps we perceive serif typefaces as more “human” because the transitions of their strokes resemble calligraphy. Perhaps sans serif typefaces are less readable because the letters are inherently more like each other, it being hard to distinguish between an uppercase *I* and a lowercase *l*, for example.

Or perhaps the explanation is self-fulfilling. We read serif type more easily because we’re more used to reading serif type. We could get used to anything; it just so happens that we’ve been reading serif type for centuries and the habit is second nature.

Sans serif typefaces are the new kids on the block, relatively speaking. They weren’t invented until the early 19th century and weren’t in common usage until much later. They were invented for

“[...] 90% of graphic designers do not know the basics of setting good text.... I am not sure why [...] maybe because colleges are frightened that students will get bored, maybe because everybody wants to be a pop-star designer they don’t think these things are important — well they are. A plea to young designers — learn the basics, then your work will have the underlying authority to be subversive.”

—Jonathan Barnbrook
(www.typographer.org/archive/mag-interview-barnbrook.html)

1. www.wired.com/2011/01/the-benefit-of-ugly-fonts

Arial

Times New Roman

Minion Pro

Myriad Pro

Verdana

Georgia

Overexposed

Brush Script

Comic Sans

Impact

Papyrus

Zapfino

Best avoided

All of these fonts, yes even Comic Sans, have their place. When we talk of bad fonts, it's more down to user error than any inherent failing of the font itself.

Those in the "overexposed" group are venerable typefaces; their only problem is that they have been loved to death. We see them too much; it's time they took a well-deserved vacation so that they can be rediscovered in a few years time and look fresh again.

Those in the "best avoided" group have garnered bad reputations because they tend to stand out on the font menu and have been put to all sorts of uses for which they were never intended.

advertising and are, in general, more forceful and in-your-face than serif typefaces. We're accustomed to seeing them used as display type, where readability is a lesser concern, because headlines and subheads are set in short bursts rather than long passages. In fact, because their letter shapes are simpler, sans serifs may be more legible than their serifs.

In practice, readability is more nuanced than choosing one class of typeface over another. It depends on how the variables of type composition are handled.

In the right hands, there's no reason why a sans serif can't be every bit as readable as a serif typeface. In fact, we're accustomed to reading sans serif typefaces at small sizes, too: for captions, in classified ads, in phone books, in timetables, on business cards, and as body text. In fact, it's often the simplicity of a sans serif that makes it suitable for small text.

To put it another way, it's less about whether the typeface has serifs or not, and more about what you do with that typeface.

Other Readability Factors

Your choice of font is just one of several factors that work in sync to create readable type. Other factors include but, as they say in legalese, are not limited to:

- Leading (see Chapter 5).
- Column measure (the relationship of type size and column width). There's no "right" size of column measure, as it will depend upon the nature of the text and the type of publication you're working for, but as a rough guide, aim for 45 to 65 characters (including the spaces) per line.
- Alignment (see Chapter 8).
- Margins (see Chapter 17).
- Printing conditions: If the piece will be printed, what kind of paper stock will be used?
- Reading conditions: This is an enormous variable over which you, the designer, have no control. You can't know whether your audience will be reading by candlelight, while standing on a busy commuter train, or while soaking in

LINE LENGTH

Bears Ears National Monument is a United States National Monument located in San Juan County in southeastern Utah, established by President Barack Obama by presidential proclamation on December 28, 2016. The monument's original size was 1,351,849 acres, which was reduced to 201,876 acres by President Donald Trump on December 4, 2017.

Too narrow

Bears Ears National Monument is a United States National Monument located in San Juan County in southeastern Utah, established by President Barack Obama by presidential proclamation on December 28, 2016. The monument's original size was 1,351,849 acres, which was reduced to 201,876 acres by President Donald Trump on December 4, 2017.

Acceptable

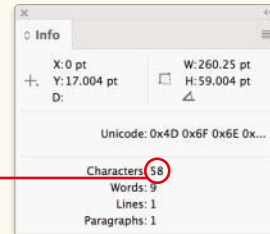
Bears Ears National Monument is a United States National Monument located in San Juan County in southeastern Utah, established by President Barack Obama by presidential proclamation on December 28, 2016. The monument's original size was 1,351,849 acres, which was reduced to 201,876 acres by President Donald Trump on December 4, 2017.

Too wide

40

60

90



the bath. Depending on the type of document you're creating, however, you can make an educated guess. For example, if you're designing a bus timetable, you'll want to forgo the challenging grunge typography in favor of a straightforward approach.

- **Color and contrast:** For type to be readable you need contrast between the color of the type and the color of the background. Avoid placing type on a busy pattern, and if you opt for placing type on top of a photograph, be aware that doing so compromises readability. What you gain in return may be worth it, but always opt for a “quiet” part of the image.

NOTE: If you're typesetting for a dyslexic audience, consider the Open Dyslexic typeface. Its unique letter shapes are designed to help prevent confusion through flipping and swapping. You can download it for free: opendyslexic.org.



CONTRAST

Type over a busy background is rendered unreadable. Positioning the type over a quiet part of the image provides sufficient contrast between text and background.

Finally, to close this chapter, some sobering (and inspiring) words from influential graphic designer David Carson: “Don’t mistake legibility for communication.” Following the rules of readability and legibility will ensure against typographic failure, but it is not a guarantee of typographic success. Just because a piece of type is legible and readable, it doesn’t always follow that people will *want* to read it.

Appendix

Type Checklist

Following the rules is not an assurance of good typography, but disregarding them is a cast-iron guarantee of bad. No matter what your level of experience, it's helpful to have a checklist to measure your work against.

Keep It Simple **Typeface Selection:** Why did you choose the typeface(s) you did? What message does it send? The only wrong answer is no answer. Your type should be a considered choice.

Sizes: Do you really need all those different sizes? And all those different weights? Can you do more with less? Consider differentiating with spacing, indentation, or color rather than changing font size or style. If you can't articulate why you need a change in size or style, maybe you don't.

Consider the Spacing **Hidden characters:** Turn them on so you can more easily spot spacing problems.

Eliminate unnecessary spaces, especially double spaces after a period.

Remove unnecessary returns: Paragraph spacing should be achieved with Space Before or Space After. Usually you need one *or* the other; occasionally it's appropriate to use both.

Paragraph spacing: There are pros and cons to using spaces between paragraphs versus first-line indents, but whichever way you choose to differentiate your paragraphs, it is an either/or proposition. Don't use both.

Remove unnecessary tabs. Just as with spaces and returns, there's never a reason for multiple tabs.

Know your space widths: Are you using em spaces, en spaces, and thin spaces where appropriate?

Kerning: Do those headlines need kerning? If so, make sure that kerning is even. Are you using the most appropriate type of automatic kerning (Metrics or Optical) for the particular class of type?

Proximity: Does the spacing of elements reinforce the connections between them? Subheads should be closer to the text that follows them than to the text that precedes them. The spacing of your paragraphs should enhance, rather than confuse, the message of the text.

Rhythm: Do the spacing values work together? The leading, the gutter spacing, and the space around pictures and graphic elements should all work together.

Know your quote marks from your inch marks. Working with Use Typographer's Quotes selected will address most, but not all, quote mark issues. Be particularly careful with apostrophes. And remember that sometimes you need inch and foot marks (primes).

Know your dashes: Make sure you're using hyphens, en dashes, and em dashes correctly.

No faking it: Don't change the horizontal or vertical scale of your type. Don't put a stroke around type to make it bolder. Don't slant your type. Instead, opt for real condensed or extended fonts, use a real bold weight, and use real italics. If your text calls for the extended use of small caps, choose a typeface that has real small caps whose strokes have the same weight as all the other glyphs in that font, rather than using fake, computer-generated small caps.

All caps: Use all caps sparingly in body copy. Sometimes shouting your message is necessary; other times it makes you look like an oaf having an uncontrolled Twitter outburst. Never use all caps for cursive or swash characters.

OpenType: Become familiar with the enhanced typographic options that OpenType Pro fonts offer, and use them where appropriate. Consider the figure style. Use real fractions; use discretionary ligatures and swash characters where appropriate. The Glyphs panel is your key to unlocking the full potential of OpenType Pro fonts.

Drop caps: Watch out for character collisions, and kern the space between the initial character and the text where necessary. And don't overuse them.

Bullets: Adjust the size, position, and spacing of bullets as necessary. The bullet character should emphasize the point but not overwhelm the text that follows it.

Sweat the Details

Special characters: Adjust the vertical position and spacing of special characters like ®, ™, and © as well as footnote characters as necessary.

Maximize Readability

Consistency: Rhythm and consistency are essential for readable text. Don't fudge things with inconsistent leading; don't vary type sizes to make things fit or fill up space. Don't squeeze type with too much tracking, or fill up vertical space with vertical justification. People *will* notice.

Leading: Make sure your leading is consistent. Avoid auto leading most of the time, especially for headings.

Justified text: Your column measure should be wide enough to achieve even word spacing. It's not enough to simply choose the justified alignment option—you need to consider how your line length, justification settings, hyphenation settings, and Optical Margin Alignment work together.

Left alignment: Pay attention to the evenness of the rag. Intervene with No Break, discretionary hyphens, and forced line breaks as necessary. Consider the importance of hyphenation and your hyphenation settings to the quality of your rag.

Center alignment: Center-aligned text can look classy or it can look boring and static. Make sure you're using it for the right reasons.

Right alignment: Use right alignment sparingly, and make sure your lines aren't too long.

Text wraps: Pay particular attention to the word spacing of your text when you position a text wrap object within a column of type.

Composition preferences: Use the H&J Violations composition preference to spot at a glance where your spacing problems are.

Hyphenation: Proper hyphenation is about more than just selecting the check box. Adapt your hyphenation settings to the needs of the text. If you hyphenate your body copy, make sure you're not

also hyphenating headings and subheads. Be sure you're using the appropriate language dictionary. Check for bad hyphenation breaks and avoid consecutive hyphens.

Tracking: Apply tracking sparingly to fix spacing problems. To achieve a tighter or looser letter fit, adjust word and letter spacing instead. Use the Custom Tracking/Kerning composition preference option to spot at a glance where the letter and character spacing has been adjusted—especially if you're working on a document you've inherited from a colleague.

Widows, orphans, and runts: Fix these when you can—just make sure that the fix doesn't create a worse problem. Don't underestimate the usefulness of editing the copy in order to make it fit.

Contrast: Make sure there's enough contrast between the color of your type and the color of the background.

Finally, make sure you're using paragraph styles and, where appropriate, character styles and object styles. If your document has multiple tables or if your tables require frequent updating, you should also be using table and cell styles. Styles are the opposable thumb of document formatting. If you're not using them, you're working too hard and your results will be clumsy. Without styles you'll be creating documents that are difficult and time consuming to edit as well as prone to formatting inconsistencies.

In all your work in InDesign, as well as any typesetting in related programs like Photoshop and Illustrator, try to balance the big picture with the small, the overarching view with attention to the minutiae. It's the combination of the two that will distinguish your work as that of someone who understands and cares about type.

Think Locally, Format Globally

Index

Numbers

1/1000 em, 14

A

Active corner, 300
 AddGuides script, 311
 Adobe Experience Manager (AEM) Mobile, 67–68
 Adobe Garamond typeface, 221
 Adobe Jenson typeface, 6, 10, 61, 168, 223–224
 After First and Before Last, hyphenation, 168
 Align panel, 110
 Align to Grid icon, 306–307, 309
 Align Towards and Away From Spine, 106–107
 Alignment
 to baseline grid, 304
 bullet lists, 197
 drop caps and, 211
 horizontal. *See* Horizontal alignment
 of numbers in number list, 199–202
 of only first line to grid, 307
 overview of, 95
 screen text and, 78
 shortcuts, 97
 table, 181
 text to grid, 306–307
 vertical, 94, 110–116
 All caps
 leading for, 86, 89
 letterspacing display type in, 120
 lining figures and, 150
 never setting script typefaces in, 6
 overview of, 53–55
 Ampersands, 146
 Anchored objects, 244–246, 272
 Apostrophes, 135
 Arial typeface, 2–3, 10, 62
 Arno Pro typeface family, 223
 Aspect ratios, pages, 287–289
 Asymmetric typography, 98
 At sign (@), 139
 Auto Leading
 avoiding, 88–92
 in EPUBs, 91
 inline graphics and, 91

Auto numbers, 196, 202
 Auto-size text frames, 36–39
 Autoflow, text, 28

B

Background
 leading based on color of, 86
 readability and contrasting, 64, 75
 Balanced columns, 93, 116
 Balanced Ragged Lines, 98, 177
 Barnbrook, Jonathan, 60
 Baseline grid
 align first line only, 307, 312
 align text and images, 308, 312
 align text to, 306–307
 cap height grid, 308, 312
 custom, 308–309, 312
 determining for master pages, 294–296
 divide page into rows, 305–306, 307
 halving, 313
 handling subheads on, 313
 ignore leading value when text is aligned to, 93–94
 positioning on layout grid, 303
 setting up, 303–305
 text frames with different grids, 308–309, 312
 Baseline shift, 17, 57–58
 Bayer Universal typeface, 53
 Bibliographies, consecutive em dashes in, 137
 Blackletter (Old English, Fraktur or Gothic) typefaces, 8
 Blackletter types, 3, 8, 21
 Bodoni typeface, 68–69, 86, 89, 225–226
 Body rows, tables, 186
 Body text, 48–49, 52–53
 Bold type, 50–51, 86
 Book feature, styles, 237
 Borders
 paragraph, 255–257
 table, 187, 194
 Bottom vertical alignment, 111–113
 Bounding boxes, 30
 Brackets, setting, 136
 Break characters, 173–178
 Breaks, controlling in EPUBs, 79

Brody, Neville, 2
 Bringhurst, Robert, 51, 168
 Bullet lists

- common use of bullet character, 139
- creating, 196–198
- exporting, 202
- on screen, 82
- sorting, 198–199
- tabs, 202–206

 Business card aspect ratio: 2:3.5, 288

C

Callout boxes, formatting, 244
 Cap height grid, 308, 312
 Capitalized words, hyphenating, 169
 Captions

- auto-size frames for, 37
- letterspacing for small type, 120
- text sizes for print, 52
- working with, 245

 Carson, David, 5, 9, 64
 Carter, Matthew, 5, 66, 73
 Casing

- text sizes for print, 52–53
- typeface combination using, 223

 Cast shadows, 276, 278–279
 Catchwords, decorative, 149
 CC Library

- adding auto-size text frames to, 39
- holding styles in, 241
- loading styles from, 235–236

 Cell styles, 228, 246–248
 Cell Styles panel, 185
 Cells, table

- formatting, 183–184
- graphics in, 190–191
- inserting tabs in, 202
- selection methods, 186

 Center alignment, 97, 104
 Center Justify, 96
 Center vertical alignment, 110–112
 Chapter headings

- casing, 54–55
- drop caps with nested styles in, 249–250

 Character count, column width, 99–100
 Character formats

- all caps, 53–55
- baseline shift, 57
- bold weights, 50–51
- common text sizes in print, 52–53
- condensed and extended type, 58
- font, 45–46
- font size, 51

- italics, 49–50
- normal/regular/roman styles, 48–49
- small caps, 53–55
- strikethrough, 57
- superscript and subscript, 55–56
- underline, 56–57

 Character styles

- applying, 231–234
- applying tracking as, 127
- bullet lists, 196
- defined, 228
- drop caps and, 208, 210, 215–216
- editing and adapting, 234–238
- end marks and, 138
- footnotes and endnotes, 258
- in nested styles, 248–250
- number lists, 196
- preserving in placed text, 242–243
- tab leaders and, 204
- understanding, 238–240

 Characters. *See also* Special characters

- glyphs vs., 144
- tab, 203
- tab leader, 204
- white space, 139–141

 Chartwell font, 148
 Circles

- aligning type in, 111, 113
- text around, 274–279

 Clarendon typeface, 221
 Classical proportions aspect ratio: 2:3, 288
 Cleanup, text, 40, 42
 Clipping path, 266, 268, 270
 Collisions, avoiding, 146
 Color

- coding master pages in long documents, 291
- combining typefaces and, 224
- drop caps and, 210–211
- leading based on background, 86
- white space and, 313

 Color and contrast

- Colour Contrast Analyser, 75
- for readable type, 63–64
- for screen type, 75

 Columns

- avoiding text wraps in single, 264, 267
- creating fixed-width, 298
- creating flexible-width, 298
- height adjustment for of all, 93
- in tables, 183–184, 186–189
- justified type and width of, 99–100
- leading and width of, 84–85, 87
- letterspacing for short/narrow, 121

Columns (*continued*)

- letterspacing for wide, 120
 - master pages, changing, 290–291
 - master pages, setting up, 296–298
 - number of, 297–298, 301
 - page/margin sizes for screen, 76
 - vertical justification vs. balancing, 116
- Combining typefaces
- choosing from same designer, 225
 - choosing typeface family, 220–222
 - combining characteristics, 225–226
 - going for contrast, 222–225
 - historical appropriateness, 225
 - overview of, 219
 - vive la différence, 220
 - what to avoid, 220
- Comic Sans font, 3–4, 62, 225
- Communication, legibility and, 64
- Composition, troubleshooting in
- Story Editor, 40, 41
- Composition Preferences
- Custom Tracking/Kerning, 124–125
 - H&J Violations, 103, 173
 - text wrap preferences, 269–270
- Compound paths, 272–275, 281
- Condensed typefaces
- in tables, 180
 - tight letterspacing of, 119, 121
 - working with, 58–59
- Content Grabber, 264, 268
- Contextual alternates, OpenType, 153
- Contoured drop caps, 213–214
- Contrast
- color and. *See* Color and contrast
 - typeface combinations based on, 221–225
- Control panel, 16
- Convert Text to Table, 184–185
- Copyright symbol, 138–139
- Create Guides, 303, 309–310
- Create Links to spreadsheet files, 187
- Curves, bullets around, 201
- Custom baseline grid, 308–309, 312
- Custom Tracking/Kerning (Composition Preferences), 124–125
- Cut and paste
- creating text frame via, 24
 - data from Excel, 185–186
 - drop caps into text frames, 209
 - positioning anchored objects, 245
 - text frame into cell as inline frame, 190
 - text into InDesign document, 35

D

- The Daily Drop Cap, 210
- Dashes, 136–137, 319
- Dates, 137
- Decimal alignment, in table cells, 191
- Decorative catchwords, 149
- Decorative drop caps
 - history of, 207–208
 - inspiration for, 210
 - kerning, 212–213
 - preventing collision with second line of text, 211–212
- Decorative typefaces, 8
- Default styles, creating, 240–241
- Degree symbol, 139
- Descenders, drop cap, 211
- Desktop publishing, first typefaces, 66
- Details, small and important
 - Glyphs panel, 142–145
 - OpenType. *See* OpenType
 - overview of, 133
 - special characters, 134–139
 - white space characters, 139–141
- Diagonal grid, designing on, 310
- Diagonal lines, applying to table cells, 192
- Didone (Modern) typefaces, 7, 86
- Digital publishing, 66
- Digital Publishing intent, 290
- Digital Publishing Suite (DPS), 67–68
- Dingbats, 9, 196
- Diphthongs, 147–148
- Direct Selection tool
 - adding text wrap to picture, 264
 - creating contoured drop caps, 213–214
 - customizing shape of text wrap offset, 265, 267–268
- Discretionary hyphens, 170–171
- Discretionary ligatures, 147–148
- Display type
 - common text sizes for print, 52–53
 - extended faces, 58–59
 - glyph positioning for all caps, 55
 - intended to stand out, 10
 - kerning in, 128, 130–132
 - leading and, 86, 88–89
 - letterspacing for all caps, 120
 - ligatures and dotless i as, 147
 - overview of, 8
 - punctuation in, 136
- Document grid, 300
- Documents
 - applying master pages to, 290–291
 - defined, 24

- knowing intent of new, 290
 - loading styles in, 235–236
 - master pages as templates for. *See* Master pages
 - modifying master pages, 291
 - moving between/arranging, 20
 - new, 286–290
 - page/margin sizes for screen, 76
 - saving settings as presets, 288
 - use of white space in. *See* White space
 - working with grids. *See* Grids
 - working with layers, 294
 - Dotless i, 147–148
 - Double quotation marks, 134
 - Double spacing, never, 140–141
 - DPS (Digital Publishing Suite), 67–68
 - Drop caps
 - aesthetics of, 210–211
 - auto numbers using, 202
 - contoured, 213–214
 - examples, 209
 - fixing tricky, 217
 - kerning, 130–131, 212–213
 - line styles and, 214
 - in nested styles, 249–250
 - other uses for, 217
 - pictures and, 213
 - in reflowable EPUBs, 81, 216–217
 - simple, 208, 210
 - small, 214–216
 - tradition of, 207–208
 - when to avoid, 218
 - Dumb (straight) quotation marks, and italics, 135
 - Dummy (placeholder) text, 34–35
 - Dyslexic audience, typesetting for, 63
- E**
- Editing styles, 234–238
 - Elements of Typographic Style* (Bringhurst), 51
 - Ellipses, 137–138
 - Em space/dash
 - bullet lists around curves using, 201
 - changing width of, 252
 - defined, 13–14
 - typography for, 137
 - as white space character, 139
 - Emoji and Symbols Viewer, Glyphs panel, 143–145
 - Emphasis
 - avoid underlines for, 56
 - with bold type, 51
 - character styles and, 240
 - with italics, 49–50
 - En space/dash
 - defined, 14
 - usage, 136–137
 - as white space character, 139
 - End marks, 138
 - Endnotes, paragraph/character styles for, 258
 - EPUBs
 - Auto Leading in, 91
 - exporting bulleted and numbered lists, 202
 - hyphenation in, 80
 - mapping object styles to, 246
 - page size and, 288
 - paragraph spacing and, 162
 - styles, and exporting, 260–262
 - styles in, 77
 - tables in, 248
 - types of digital publishing, 66–67
 - Excel, 185–187
 - Exporting
 - bulleted and numbered lists, 202
 - styles, and EPUB, 260–262
 - Extended type, 58–59
 - Eyedropper, applying styles with, 243
- F**
- Facing-pages documents, master pages, 296
 - Feet, measurements, 135
 - Fibonacci sequence, 287
 - Figure space character, 140
 - Figures, OpenType, 150
 - Fills, table, 182, 187
 - Filters, font, 46, 60
 - Find/Change dialog box, text cleanup, 42
 - Find Font dialog, 47
 - FindChangeByList script, 42
 - Finials, 149
 - First Baseline offset, 111–113, 161
 - First-line indents
 - aligning circled numbers in number list, 201
 - alternatives to, 158
 - creating bullet lists with, 196
 - paragraphs and, 156–157
 - for screen, 78–79
 - vs. paragraph spacing, 158
 - Fixed Column Width, 298
 - Fixed-layout EPUBs (FXLs)
 - choosing type for screen, 70
 - digital publishing with, 66–68
 - embedding fonts for, 72
 - hyphenation in, 80
 - leading for screen, 75
 - page and margin sizes for screen, 76
 - using fractions, 81

- Fixed-Page Autoflow, text, 28
 - Fleurons. *See* Ornament typefaces
 - Flexible Column Width, 298
 - Flush left
 - bullet list alignment and, 197
 - first-line indent alternatives, 158
 - Left alignment, 96
 - Flush spaces, 139
 - Folios, master page, 292
 - Fontastic, 196
 - FontAwesome, 144
 - Fonts
 - for bullet characters, 196
 - changing default, 24
 - character format options. *See* Character formats
 - combining in same word, 130, 225
 - combining using same typeface family, 220–223
 - handling missing, 47
 - management utility for, 46
 - for numbers in circles, 201
 - for screen, 68–73
 - size, 52–53
 - size/style of typeface and, 4
 - for table text, 180
 - three-dot ellipsis, 137–138
 - variable, 49
 - Footer rows, tables, 186
 - Footnotes
 - paragraph/character styles for, 258
 - superscript and, 55–56
 - Formatting. *See also* Character formats
 - callout boxes in Object Styles, 244
 - clearing overrides, 233–234
 - removing from already-imported table, 185
 - Nested styles, 228
 - styles and, 228
 - tables with Control panel, 182–183
 - using character styles for exceptions to, 238
 - Formulas, superscript typeface for, 56
 - Fractions
 - making OpenType, 252
 - overview of, 151–153
 - using fraction glyph for EPUBs, 81
 - nut or stacked fractions, 151–152
 - Proper Fraction script, 151
 - Frame tool, 24, 201
 - Frames
 - converting to anchored objects, 245–246
 - numbering across unthreaded, 198–199
 - using clipping paths as, 270
 - Type Tool Converts Frames to Text Frames (Type Preferences), 36
 - Full Justify alignment, 96, 103
 - Futura typeface, 4, 8, 10–11, 225, 278
 - FXLs. *See* Fixed-layout EPUBs (FXLs)
- G**
- Garalde Oldstyle typefaces, 6–7
 - Garamond typeface, 4, 6, 11, 72, 153, 221, 240
 - Geometric sans serif typefaces, 4–5, 8, 225–226
 - Georgia typeface, for screen, 62, 66, 73
 - Gill, Eric, 3, 223, 225
 - Gill Sans typeface, 4, 10, 223, 225, 252
 - Glyph Scaling, alignment, 101–102
 - Glyphs
 - characters vs., 144
 - choosing contextual alternates, 153
 - for discretionary ligatures/diphthongs, 148
 - for fractions in EPUBS or FXL, 81
 - glyph sets, 142, 144
 - handling missing, 145
 - positioning for all caps display, 55
 - using stylistic sets, 154
 - Glyphs panel, 142–145
 - Golden section/golden aspect ratio: 1:1.618, 288
 - Google Fonts, 152–153
 - Gotham typeface, 223
 - Gradients, applying text, 280–283
 - Graphic cells, converting table cells to, 190–191
 - Graphics
 - changing graphic frames to text frames, 36
 - text wraps and, 264, 266–268
 - Gravity effect, 268, 276
 - GREP Find/Change
 - changing open quotes to apostrophes, 136
 - converting manual numbers/bullets to auto, 203
 - creating nonbreaking space with, 80–81
 - replacing ellipsis with customized ellipse, 138
 - GREP styles
 - defined, 228
 - managing runt lines, 123
 - overview of, 250, 252
 - simulating primes, 135
 - Grid Calculator Pro, 309
 - Grid field, 300
 - Gridify feature, 305, 311
 - Grids
 - baseline. *See* Baseline grid
 - document, 300
 - Grid toolkit, 309–311
 - layout, 300–303
 - overview of, 299
 - types of, 300
 - working with, 298
 - Grotesque sans serif typefaces, 4–5, 8, 10

- Groups, style, 236–238
- Guides
 - creating master page, 291
 - positioning on layout grid, 300
 - turning on Snap to Guides, 308
- Guillemets, 135
- Gutter width
 - fixed width columns, 298
 - leading and, 85, 87
 - in multicolumn documents, 297
- Gutters, 300
- H**
- H&J Violations, 103, 173
- Hair space character, 139
- Halving baseline grid, 306, 313
- Hanging indents
 - bullet lists, 196
 - paragraphs, 158–159
 - tabs, 206
- Hanging punctuation, 109
- Headers
 - center alignment for, 104
 - with clear visual clues for tables, 182
 - running heads in master pages, 292
 - selecting table rows, 186
- Headlines
 - all caps text in, 53
 - casing chapter headings, 54–55
 - condensed type for, 58–59
 - manual kerning for, 130
 - manually threading, 32
- Heads, creating reverse-out, 254–255
- Heller, Steven, 2
- Helvetica typeface, 2–3, 8, 10, 89, 180, 220–221
- Hidden characters
 - Auto Leading issues, 90
 - in Story Editor, 41
 - text cleanup, 42
 - viewing, 82
- Hierarchy
 - creating with based on styles, 230–231
 - of information, 163
 - white space creating visual, 314–315
- Highlights, underlining applied as, 56–57
- Hische, Jessica, 3
- Historical accuracy, combining typefaces, 224–225
- Horizontal alignment
 - Align Towards Spine/Align Away from Spine, 106–107
 - aligning elements relative to each other, 110
 - centering type, 104
 - how InDesign composes type, 100–103
 - left-aligned type, 97–100
 - optical alignment and hanging punctuation, 109
 - overview of, 96–97
 - right-aligned type, 105–106
 - side heads, 107–108
- HTML, InDesign and, 67
- Humanist sans serif typefaces, 4–5, 8, 73
- Hyperlinks, underlining applied to, 56
- Hyphen Limit, 168–169
- Hyphenate Across Column, 170
- Hyphenate Capitalized Words, 169
- Hyphenate Last Word, 170
- Hyphenation
 - discretionary hyphens, 170–171
 - dos and dont's, 174
 - in EPUBs, 80
 - H&J Violations, 173
 - in justified type with last line aligned left, 99
 - nonbreaking hyphens, 171
 - options, 167–170
 - qualities of good, 166
 - turning off for right-aligned text, 105
 - user dictionaries and, 171–173
 - varieties of hyphens, 168
- Hyphenation slider, 169
- Hyphenation zone, 169
- I**
- Icons, 196
- Images. *See also* Type and images
 - aligning to grid, 308, 312
 - simple type effects and, Type effects
 - text wraps around irregularly shaped, 266–268
- Importing
 - object styles from another document, 246
 - prepared text into document, 24–25
 - styles from Microsoft Word documents, 241–243
 - tables, 184–185
- Inch marks, 135, 319
- Indentation
 - Balanced Ragged Lines using, 177
 - on screen, 78–79
 - typeface combinations using, 223
 - types of, 156–160
- Indent to Here character, 109
- InDesign overview
 - Control panel, 16
 - finding preferences, 12–13
 - introduction to, 2
 - names of typefaces, 11
 - Tools panel, 14–15

InDesign overview (*continued*)

- type anatomy, 4–5
- type characteristics, 10–11
- type choices. *See* Type choices
- type classification, 6–10
- type measurement systems, 13–14
- type sizes, 10
- type weight, 11
- viewing pages, 16–20
- workspaces, 20–21
- zooming in/out, 17–18

Industria typeface, 224

Info panel, 99

Infographics fonts, 148

Inline graphics, 91

Inserting

- rows and columns into tables, 188
- white space, 138, 175–176

Intent

- choosing in new document, 290
- specifying for Web or Mobile document, 75

Interactive PDFs, digital publishing with, 67–68

Interlocking type, 281

Inverted text wraps, 271

ISO paper sizes, 288

Italics

- automating for straight quotes, 135
- letterspacing for, 119
- for OpenType swash characters, 149
- overview of, 49–50
- typeface combinations using, 223

J

Joining tables, 192

Justified alignment

- defined, 96
- InDesign settings, 100–103
- with last line aligned left, 98–100, 103
- leading and, 85–87
- left alignment vs., 96–97
- other types of, 103
- text elements that should never use, 100
- using Optical Margin Alignment with, 109

Justified type, text wraps and, 264, 267

Justified vertical alignment, 111–115

Justify All Lines alignment, 102–103

K

Keep Options

- Keep Lines Together, 126–127, 177–178, 189
- Keep with Next, 164, 176–177
- Keep with Previous, 177
- Start Paragraph, 178

Kerning

- automatic, 128
 - defined, 118
 - display type, 131–132
 - drop caps for listicles, 212–213
 - keyboard shortcuts, 17
 - manual, 130
 - metrics kerning vs. optical, 128–130
 - overview of, 127–128
 - particular letter combinations, 129
 - script typefaces and, 6
 - shortcuts, 120
 - style overrides, 127
 - vs. tracking. *See* Tracking vs. kerning
- Kerning pairs, 129–130, 252
- Keyboard increments, 17

L

Landscape orientation, pages, 290

Language dictionaries, hyphenation and, 166–167

Language, Font menu organized by, 46

Last-line indents (right-hanging indents), 158–159

Layers

- Suppress Text Wrap When Layer Is Hidden, 269, 270
- working with, 294

Layout

- aligning elements on page, 110
- changing number of columns in, 297–298
- type wraps creating flexible, 272
- white space in, 313–315

Layout grid, 300–303

Layout Grid Calculator, 309

Layout view, Story Editor, 40–41

Leader dots, on screen, 82

Leading

- Auto Leading, 88–92
- keeping consistent, 92–94
- as line height in screen type, 83
- overview of, 83
- for screen, 74–75
- size, 84–87, 156

Left alignment, 96–100, 103–104, 109

Left-hanging indents (outdents), 158–159, 206

Left indents, 159–160, 201

Left Justify. *See* Justified alignment

Legibility and readability, 59–62

Letter Spacing, 118

Letterforms

- legibility and, 60
- type, 5
- type for screen, 70

- Letterspacing
 - defined, 118
 - fixing windows, orphans and rivers, 126
 - in justified type, 101
 - kerning and. *See* Kerning
 - tracking vs., 118–121
 - type for screen, 70
 - Licko, Zuzana, 2
 - Ligatures
 - customizing, 281
 - in OpenType, 146–148
 - Lines
 - applying text wraps, 265, 267
 - line breaks, 79, 173–178
 - scale and master pages, 292–293
 - styles and drop caps, 214
 - Lining numbers, 150, 180
 - Linking
 - to spreadsheet files, 187
 - to text files, 244
 - List styles, numbering across frames, 198–199
 - Listicles, 202
 - Lists
 - bullet. *See* Bullet lists
 - number. *See* Number lists
 - sorting, 198–199
 - tabs, 202–206
 - working with, 196
 - Local overrides, clearing, 233
 - Loose letterspacing, 119–120
 - Lorem ipsum*, 34
 - Lower case typeface, 53
 - Lupton, Ellen, 2
- M**
- Mac, sharing workspace in, 20
 - MakeGrid script, 305, 311
 - Manual kerning, 130–132
 - Manual text flow, 28
 - Manutius, Aldus, 3
 - Margins
 - and aspect ratios, 289
 - changing master page, 290–291
 - creating from text frame, 297
 - relative size of, 295–296
 - size settings for screens, 76
 - Master pages
 - adding nonprinting line scale to, 292
 - applying with primary text frames, 27
 - columns, 296–298
 - facing-pages documents, 296
 - folios, 292
 - guides, 291
 - margins, 294–296
 - overview of, 290–291
 - running heads, 292–293
 - section markers, 293–294
 - Measurement systems, type, 13–14
 - Merging/unmerging table cells, 190, 193
 - Metrics kerning, 129–131
 - Microsoft Word
 - alternatives to, 40
 - Import Options, 36–37
 - importing styles from, 241
 - preserving character styling i, 242–243
 - text flow in, 24
 - Minion Pro typeface, 3
 - Minus sign, typography, 136
 - Missing fonts, handling, 47
 - Mobile Intent, new document, 290
 - Modern (Didone) typefaces, 7, 86
 - Monocased typefaces, 53
 - Monospaced fonts
 - defined, 9
 - metrics kerning for, 129
 - Moving, rows and columns in tables, 188
 - Müller-Brockmann, Josef, 298, 309
 - Multilingual publishing, 147
 - Multiplication sign, typography, 138
- N**
- Naming
 - styles, 235–236
 - typefaces, 11
 - Nested styles
 - defined, 228
 - drop caps in, 215–216, 249–250
 - end marks in, 138
 - examples, 251
 - overview of, 248–250
 - Next Style, sequential styles, 252–254
 - No Break
 - creating bullet lists, 198
 - managing runt lines, 123
 - nonbreaking spaces vs., 171
 - overview of, 175–176
 - Non-joiner, kerning drop caps, 212–213
 - Nonbreaking hyphens, 170–171
 - Nonbreaking space
 - No Break vs., 171, 176
 - overview of, 140
 - on screen, 79
 - Number lists
 - creating with manual numbers, 196
 - overview of, 198–202
 - using tabs, 202–206

Numbers

- drop caps with auto, 202
- in fractions, 151–153
- lining vs. oldstyle figures, 150
- on screen, 82
- page, 292

Nutso font, stacked fractions, 152–153

O

Object Layer Options, 273, 277

Object styles, 228, 243–246

Oblique type, 50

Oldstyle numbers, 81, 150

Only Align First Line to Grid, 307

Open Dyslexic typeface, 63

OpenType

- checklist, 319
- contextual alternates and, 153
- features of, 142
- figures, 150
- fractions, 150–152
- ligatures, diphthongs, and dotless i, 146–148
- ornaments, 9, 148–149
- overview of, 146
- stylistic sets, 154
- swash characters, 149
- titling alternates, 153

Optima typeface, 225

Optical kerning, 128–131, 225–226

Optical Margin Alignment

- bullet lists, 198
- drop caps in, 211
- overview of, 109
- text elements when using, 294

Optima typeface, 225

Ordinals, superscript for, 55

Orientation, page, 290

Ornament typefaces, 9, 148–149

Orphans

- controlling on screen, 80
- defined, 122
- fixing, 93, 123–127

Outlines

- converting text to, 273–274
- creating interlocking type, 281

Overrides

- clearing, 233
- converting to styles, 244
- redefining styles, 234

Overset text, 38

P

Packages

- avoiding missing fonts, 47
- Typekit fonts not collected in, 59

Padding, within text frame, 160

Pages

- breaks on screen, 79
- choosing size for, 286–289
- designing orientation, 290
- dividing into rows, 305–307
- page breaks. *See* Break characters
- setting up columns, 296–298
- size settings for screen, 76
- viewing, 16–20

Palatino typeface, 225

Panning, around large view, 17

Paragraph Composer, 100, 102, 126

Paragraph Formatting Controls, 16

Paragraph styles

- applying, 231–234
- Auto Leading issues, 88, 90
- changing default font, 24
- creating, 229–231
- creating bullet and number lists, 196–197
- creating table of contents, 258–260
- defined, 228
- editing and adapting, 234–238
- and EPUB export, 260–262
- exporting bullet and number lists, 202
- footnotes and endnotes, 258
- justification settings and, 100
- letterspacing adjustments in, 118
- mistakenly using character styles vs., 240
- and nested styles, 248–250
- restarting numbers for number list, 200
- setting leading values, 92–93
- setting tabs, 203
- Space Before or Space After, 162

Paragraphs

- aligning circled numbers in number list, 201
- borders for, 255–257
- breaking. *See* Break characters
- drop caps for opening. *See* Drop caps
- first-line indents, 156–158
- fixing drop caps with short opening, 217
- hanging indents, 158–159
- left and right indents, 159–160
- rules for, 254–257
- rules for screen text, 82
- shading, 256, 258
- spacing, 160–164
- spacing on screen, 78–79

Parentheses, 136

Pathfinder options, 278–281
 Pen tool, shaping text wrap offsets, 268
 Perpetua typeface, 223
 Photo credits, letterspacing for small type, 120
 Photographic aspect ratio: 1:1.5, 288–289
 Pi typefaces, 9
 Picas, 13
 Picture credits, using auto-size frames, 38–39
 Picture drop caps, 213
 Picture frames

- aligning text frames to, 308, 312
- text as, 275

 Pilcrows, 158
 Place command, 36
 Placeholder (or dummy) text, 34–35
 Point size, 10–11
 Points

- leading, 84
- overview of, 13

 Portrait orientation, pages, 290
 Positioning

- anchored objects, 245
- caption next to image, 245

 Power Styles, Blatner Tools suite, 242
 Power Zoom, 18
 Preferences

- Font menu, 45–46
- Grid, 303–304
- for recommended units/increments, 16
- Story Editor, 40–41
- text wrap, 269–270
- working with, 10–11

 Presets, New Document, 288
 Primary text frames, 26–28, 76
 Prime marks, 135
 Print Intent, new documents, 290
 Print, white space and, 315
 Proximity, 163–164
 Publish Online documents, 66–68
 Pull-quotes, auto-size frames for, 37, 39
 Punctuation

- bullet lists, 197
- fixing tricky drop caps, 217–218
- hanging, 109
- Optical Margin Alignment for, 109
- space character, 140
- typography for, 136

Q

Question-and-answer, using drop caps, 217
 Quick Apply

- clearing overrides, 234
- finding styles, 232

Quotations

- hanging punctuation for, 109
- indenting, 159–160
- quote mark shortcuts, 135

 Quote marks, 134–135

R

Ragged alignment

- in bullet lists, 198
- justified type vs., 98
- leading applied as, 94
- in left-aligned type, 97–98
- overview of, 96
- in right-aligned text, 105

 Ratio, determining margin, 295–296
 Readability

- all caps text and, 53
- bold type and, 51
- checklist for maximizing, 320–321
- color and contrast for, 63
- emphasizing in tables, 181–182, 187
- italics and, 50
- leading and. *See* Leading
- and legibility, 59–62
- other factors affecting, 62–63
- rules of, 60–61
- on screen vs. printed page, 82
- serif vs. sans serif and, 61–62
- sizing screen type for, 72, 74
- of tables. *See* Tables
- text wrap on left edge undermining, 264, 267
- transparency effects and, 283–284
- white space and. *See* White space

 Rectangle tool, vs. Rectangle Frame tool, 36
 Redefining styles, 234
 Reflowable EPUBs

- digital publishing with, 66
- drop caps in, 216–217
- hyphenation in, 80
- page size and, 288
- screen type for. *See* Screen typography
- text flow in, 33–34

 Registered symbol, 138–139
 Regular style type, 48
 Relative units, 13–14
 Repeating formats, using nested styles, 250
 Repeating tabs, 206
 Return (Enter), creating line spaces and, 160–162
 Reverse-out heads, 255
 Reverse-out text, 87
 Reverse type, 120
 Rewriting copy to copyfit, 126
 Right alignment, 96, 105–106

- Right-hanging indents (last-line indents), 158–159
 - Right indent tabs, 206
 - Right indents, 159–160
 - Rivers, fixing, 125–127
 - Road signage, letterspacing for, 120
 - Rockwell typeface, 221
 - Roman style type, 48
 - Rounded-corner tables, 191, 194
 - Rows
 - dividing pages into, 305–306
 - selecting table, 186
 - specifying height for, 189
 - specifying number of, 183–184
 - working with tables, 187–189
 - Ruler Guides, 303, 304, 310
 - Ruler units, viewing pages, 17
 - Rules
 - applied to paragraphs, 254–257
 - for typeface combinations, 223
 - Run-in heads, using nested styles, 250–251
 - Running heads (headers), master pages, 292–293
 - Runts
 - controlling on screen, 80
 - managing with GREP styles, 123, 252
 - overview of, 122
- S**
- Sans serif typefaces
 - all caps text, 53
 - bold vs. oblique style, 40
 - choosing type for screen, 68–69
 - combining with serif, 224–225
 - examples of, 10
 - extended faces as, 58–59
 - letterspacing all caps display type, 120
 - letterspacing headlines using, 121
 - ligatures and, 147
 - naming conventions for indicating weight, 11
 - overview of, 8
 - serif vs., 4–5, 61–62
 - for table text, 180
 - Scale for Descenders, 211–213
 - Scaling type, for screen, 74–75
 - Scientific notation, typeface for, 55
 - Screen typography
 - alignment, 78
 - choosing type, 68–73
 - color and contrast, 75
 - controlling breaks, 79
 - controlling widows, orphans, and runts, 80
 - indents and paragraph spacing, 78–79
 - leading, 74–75
 - overview of, 65–66
 - page and margin sizes, 76
 - preparing type for, 72
 - scaling type, 74
 - sizing type, 72, 74
 - styles, 77
 - threading text, 78
 - types of digital publishing, 66–68
 - typographic details, 80–82
 - Script typefaces
 - choosing type for screen, 69–70
 - defined, 6
 - letterspacing for, 119
 - manual kerning of, 130
 - metrics kerning and, 129–130
 - Scripts panel, text cleanup, 42
 - Search
 - fonts, 45
 - Typekit font filters, 60
 - Section markers
 - drop caps for, 211, 249–250
 - for master pages, 293–294
 - Selection methods
 - table, 186–187
 - text, 44
 - Selection tool
 - keyboard shortcuts, 14–15
 - moving/resizing text frame, 26
 - Semi-Autoflow, text flow, 28
 - Semibold type, leading for, 86
 - Sequential styles, 252–254
 - Serif typeface
 - all caps text in, 53
 - choosing type for screen, 68–69
 - combining with sans serif, 224–225
 - increasing italics size in, 50
 - letterspacing all caps display type, 120
 - letterspacing headlines/brandnames, 120
 - setting body text in print, 48–49
 - slab serif, 7
 - vs. sans serif, 4–5, 61–62
 - Shading, paragraph, 256, 258
 - Shape, changing object, 36
 - Sharing workspaces, 20
 - Shift key, viewing import options, 36
 - Shortcuts
 - alignment, 97
 - assigning to styles, 231–232
 - font size, 51
 - kerning/tracking, 120
 - leading, 88
 - master pages, 291
 - quote mark, 135
 - symbols, 139

- table, 184
- text selection methods, 44
- Tools panel, 14–15
- tracking vs. kerning, 121
- viewing pages, 16–20
- Show Import Options, Place dialog box, 36, 184–185
- Side heads, 107–108
- Sidebars, auto-size frames for, 39
- Silver aspect ratio: 1:1.4142, 288
- Single-Line Composer, Adobe, 100, 102
- Single quotation marks, 134–136
- Single word justification, 102–103
- Size
 - of drop caps, 210–211
 - of first-line indents, 156
 - of leading, 84–87
 - of pages, 286–289
 - of pages and margins for screens, 76
 - point, 10
 - relative size of margins, 295–296
 - resizing rows and columns, 188–189
 - screen type, 72, 74–75
 - typeface combinations and text, 223, 224
- Skewed text, 276, 279
- Skip by Leading, 92
- Slab serif (Egyptian) typefaces, 7
- Small caps typeface
 - drop caps and, 214–217
 - fake and real in reflowable EPUBs, 80–81
 - uses for, 55
- Small Panel Rows option, 238
- Smart Guides, 311
- Smart Text Reflow, 27–28, 76
- Snap to Guides, 308
- Sorting
 - lists, 198–199
 - styles, 236
- Spacing
 - alignment and, 97
 - avoid double, 140–141
 - bullet lists, 197
 - checklist for type, 318–319
 - combining typefaces using different, 224
 - first-line indents vs. paragraph, 158
 - how InDesign composes type, 100–103
 - kerning drop caps, 212–213
 - paragraph, 160–164
 - ragged alignments and, 96
 - repeating tabs, 206
 - typeface combinations using, 223
- Span Columns, 31–32
- Special characters
 - accessing, 138
 - apostrophes, 135
 - checklist for, 320
 - dashes, 136–137
 - ellipses, 137–138
 - end marks, 138
 - multiplication and minus signs, 138
 - overview of, 134
 - punctuation, 136
 - symbols, 138–139
 - typographer's quotes, 134–135
- Spiekermann, Erik, 3, 60
- Split Columns, 31–32
- Splitting table cells, 190–193
- Stacked fractions, 152–153
- Stair Step effect, vertical type, 113, 116, 276, 282
- Start Paragraph options, Keep Options, 178
- Step and Repeat, 305, 308, 310
- Stick-up caps, 208–209
- Story Editor, 192, 232
 - viewing story in, 41
- Straight (dumb) quotation marks, and italics, 135
- Strikethroughs, 57
- Strokes, 68–69, 187
- Style groups, 236–238
- Style sheets, 239
- Styles
 - applying, 231–234
 - applying with Eyedropper, 243
 - based on other styles, 230–231
 - cell, 246–248
 - character. *See* Character styles
 - checklist for, 321
 - choosing style guide, 138
 - clearing overrides, 233–234
 - converting overrides to, 244
 - creating reverse-out heads, 254–255
 - creating table of contents, 258–260
 - custom kerning/tracking overrides using, 127
 - default, 240–241
 - editing and adapting, 234–238
 - and EPUB, 77
 - and EPUB exports, 260–262
 - finding using Quick Apply, 232
 - fixing paragraph style pairs, 233
 - footnotes and endnotes, 258
 - GREP. *See* GREP styles
 - for group of documents, 237
 - importing from Microsoft Word documents, 240–242
 - list, 196, 198–199
 - loading from another document, 235
 - loading from CC Library, 235

Styles (continued)

- master pages as page. *See* Master pages
- nested styles, 248–250
- object styles, 243–246
- organizing, 235–238
- overview of, 227
- paragraph. *See* Paragraph styles
- paragraph borders, 255–257
- paragraph shading, 258
- reasons to use, 228–229
- rules, borders, and shading, 254
- sequential styles, 252–254
- table, 180, 246–248
- terminology for, 228
- Stylistic sets, OpenType, 154
- Subheads
 - all caps text in, 53
 - casing of chapter headings, 54–55
 - common text sizes in print, 52
 - handling on baseline grid, 306–307, 313
 - paragraph spacing and proximity of, 164
- Subscript (inferior) typeface, 55–56, 151
- Substituted glyphs, handling, 145
- Superscript (superior) typeface, 55–56, 151
- Suspended hyphens, 136
- Swash characters, OpenType, 149
- Symbols
 - commonly used, 139
 - typefaces using, 9
 - typography for, 138–139
- Syncing documents, 291

T

- Tab leaders, 203–206
- Tab Ruler, 203, 205–206
- Tab stops, 203, 205
- Table of contents (TOC)
 - creating, 258–260
 - exporting to EPUBs, 260–262
 - left/right paragraph indents in, 159
 - updating, 260
- Tables
 - aesthetics of, 180–182
 - anatomy of, 180
 - cells, 190–191
 - creating, 182–186
 - enhancing readability in, 181–182, 187
 - finding, 192
 - formatting, 183–184
 - joining and splitting, 192
 - language dictionaries and, 166–167
 - overview of, 179
 - rounded-corner, 191
 - rows and columns, 187–189
 - selection methods, 186–187
 - shortcuts, 184
 - Story Editor and, 192
 - styles, 228, 246–248
 - text wrap and, 193
 - unexpected uses for, 192–194
- Tabs, 203–206
- Tabular lining numerals, 130
- Tschichold, Jan, 54, 66, 98, 156, 288
- Terminal characters, 149
- Text
 - adding variables to master pages, 292–293
 - aligning to baseline grid, 306–307
 - converting to outlines, 273–274
 - converting to table, 184–185
 - leading and, 84
 - linking to text files, 244
 - selecting within table cell, 186
- Text flow
 - dragging and dropping text files into, 29
 - inserting text file into existing, 37
 - other methods of, 28
 - overview of, 25–26
 - in reflowable EPUBs, 33–34
 - threading text for, 29–33
 - using primary text frames for, 26–28
- Text Frame Options, vertical alignment, 110–113
- Text frames
 - aligning to top of picture frames, 308, 312
 - anatomy of, 25
 - auto-sizing, 36–39
 - breaking tables across, 189
 - changing graphic frames to, 36
 - creating, 24
 - creating contoured drop caps, 213–214
 - creating margins from, 297
 - with custom grids, 308–309, 312
 - defined, 24
 - fitting, 25
 - multiple-column or individual, 33
 - scaling type size together with, 51
 - snapping to baseline grid, 308
 - tables contained in, 182
 - text flow using, 25–28
 - threading text between, 29–33
 - viewing bounding boxes for, 30
- Text insets, 160–161
- Text typefaces, 10
- Text wraps
 - in anchored objects, 272
 - applying, 264–265
 - applying to master page only, 266

- around irregularly shaped graphics, 266–268
- combining lists with, 202
- contoured drop caps with, 213–214
- flexible layouts with, 272
- ignoring, 271
- inverted, 271
- nudger script for, 269
- overview of, 264
- preferences, 269–270
- Skip by Leading for Jump Object style of, 92
- tables and, 191, 193
- Text Wrap panel, 265
- Texture, text as, 275
- Thin space character, 140
- Threading text, 29–33, 78
- Three-dot ellipsis, 137
- Tight letterspacing, 119–121, 129
- Tildes (~), 135
- Titling alternates, 153
- TOC. *See* Table of contents (TOC)
- Tools panel, 14–15
- Top vertical alignment, 110–112
- Tracking
 - $\frac{1}{1000}$ em measure used in, 14
 - adjusting overall look of type, 129
 - creating vertical type, 282
 - defined, 118
 - fixing composition problems, 118
 - fixing windows, orphans and rivers, 123–126
 - and Paragraph Composer, 126
 - shortcuts, 17, 120
 - style overrides, 127
 - vs. letterspacing, 118–121
- Tracking vs. kerning
 - defined, 121
 - fixing windows, orphans and rivers, 126–127
 - letterspacing, 126
 - overview of, 50
 - rivers, 125–126
 - runts, widows, and orphans, 122–125
 - shortcuts, 121
 - style overrides and custom, 127
- Trademark symbol, 138–139
- Transitional typefaces, 6
- Transparency, 282–284, 294
- Troubleshooting, text composition in Story
 - Editor, 40
- Twombly, Carol, 4
- Type
 - anatomy of, 4–5
 - characteristics of, 10–11
 - checklist for, 318–321
 - classification of, 6–10
 - Control panel, 16
 - display, 10
 - em space, 13–14
 - en space, 14
 - identifying typeface, 48
 - letterform, 5
 - measurement systems, 13–14
 - naming conventions, 11
 - preferences, 12–13
 - size, 10, 120
 - weight, 11
- Type and images
 - creating flexible layouts with text wraps, 272
 - ignoring text wraps, 271
 - inverted text wraps, 271
 - simple type effects. *See* Type effects
 - text wrap preferences, 269–270
 - text wraps, 264–265
 - working with, 263
 - wrapping type around irregularly shaped graphics, 266–268
- Type area, 300, 307
- Type choices
 - basic character formats. *See* Character formats
 - Formatting Affects Text, 44
 - introduction to, 2–4
 - legibility and readability, 59–64
 - organizing content, 34–35
 - overview of, 43
 - for screens, 68–73
 - Selection tool, 14
 - text selection methods, 44
 - Typekit fonts, 58–59
- Type Contextual Controls, 146, 153
- Type effects
 - gradients, 280–283
 - outlines, 273–274
 - Pathfinder, 278–280
 - transparency, 283–284
 - Type on a Path, 274–278
- Type on a Path options
 - putting type around circles, 274–278
 - vertical type, 113, 116, 281
- Type on page
 - auto-sizing text frames, 36–39
 - Microsoft Word text, 36–37, 40
 - pasting text, 35
 - placeholder text, 34
 - Story Editor, 38–41
 - text cleanup, 40–42
 - text flow, 25–29
 - text flow in reflowable EPUBs, 33–34
 - text flow with text threads, 29–33

Type on page (*continued*)
 text frames, 24–25
 thumbnails, 34–35
 viewing content in Story Editor, 38–41
 Type tool, 14–15
 Typeface. *See also* Type
 combining. *See* Combining typefaces
 defined, 4
 Typefitter plug-in, 124
 Typekit fonts, 46, 58–60
 Typographer’s quotes, 134–135
 Typography workspace, 21

U

Underlines, 56–57
 Uppercase or unicameral typeface, 53
 Units & Increments, viewing pages, 17
 Univers typeface, 221
 Unmerging table cells, 190, 193
 Up style, 53
 Update Table of Contents, 260
 Upper case typeface, 53
 User dictionaries, 171–173

V

van den Dungen, Danny, 118
 Variable fonts, 49
 Venetian Oldstyle typefaces, 6
 Verdana typeface, 62, 66
 Versal, defined, 208
 Verse, indenting, 159
 Vertical alignment, 110–116, 190
 Vertical justification, 94, 111–115
 Vertical pipe (|), 135, 252
 Vertical type, 113, 116, 282
 Viewing
 pages, 16–20
 text in Story Editor, 38–41

W

Weights, typeface
 bold, 50–51
 combining typefaces using different, 224

 overview of, 11
 for screen, 68–69
 White space
 in centered type, 104
 characters, 139–141
 converted to regular characters on
 screen, 82
 created by indents and spacing, 164
 removing or maximizing, 315–316
 in right-aligned type, 105
 side heads and, 107–108
 using effectively, 311, 313–315

Widows

 controlling on screen, 80
 fixing, 93, 123–127
 overview of, 122

Word count, column width, 99

Word Import Options, 134

Word, mixing typefaces in same, 225–226

Word spacing

 alignment and, 101
 fixing windows, orphans and rivers, 126
 in justified type, 98–99
 leading and size of, 85–86
 in left-aligned type, 97
 letterspacing adjustments and, 118–121
 ragged vs. justified alignments, 96–97

Words with at Least, hyphenation

 option, 168

Wordsflow plug-in, 244

Workspaces, 20–21

X

X-height

 choosing screen type, 70
 combining typefaces using matched,
 225–226
 leading and, 86, 89
 small caps only as tall as, 55
 and type size, 10

Z

Zooming in/out, 17–18