

# How to Lay Out a Book in InDesign

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These notes describe how I designed my book, *Somewhere and Nowhere*, using Adobe InDesign (Creative Cloud 2015.3 release). I am sharing them in the hope that they might be useful to other self-publishers. Disclaimer: I have used InDesign for years, but I am not an expert—the program has many capabilities I am unaware of. So, there might be better methods.

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## **Getting Started**

### ***Document setup***

When you create your new InDesign document, you input basic details like page and margin sizes. If you're unsure what to use, measure a book you admire to get sizes. Note that a book uses "mirror margins" because the inside margin on both pages should be wider than the outside margin. I also asked my printer what standard paper sizes they had; standard sizes are cheaper. Here are the sizes I used (in inches):

- Page size: 6 x 9
- Outside margin: 5/8 (0.625)
- Bottom margin: 3/4 (0.75)
- Inside margin: 3/4 (0.75)
- Top margin: 7/8 (0.875)

### ***Font***

You must choose a font for the body of your text. Two considerations are the font's readability and the space it takes. My book was on the long side, so I wanted a compact font that would condense the text into less pages.

The What the Font app helped me identify compact fonts used in other books. I also searched online for suggestions. I tested several fonts by changing the paragraph style applied to the text (more on styles below): I saw the total page count that resulted, and I printed a page to check the readability, asking several people for opinions. There are a lot of cool fonts, but ideally the font does not distract the reader from the content. I chose Garamond.

### ***Headers***

Unlike in a word processing document, the headers are located in text frames inserted by you. Put them on the document's master pages. (This makes them appear in the same place on each page.) I positioned the headers between 9/16 inch and 11/16 inch from the top of the page, and made them stretch the entire width of the page (between the margins).

There are options for what information to include in the headers. In addition to page numbers in each corner, I decided to have the book title in the left header and the chapter title in the right header. (I chose this because when I am reading, I forget the chapter title and sometimes flip back to see it.) The left header can simply be created on the master page: insert a page number (see instructions below) followed by spaces and the book title, and format the text by applying a style or manually altering the font. I chose to make the book title appear in small caps. The right header is a "running head" and is discussed below.

To remove the header from one page, you can override the master page and delete the header by holding down Ctrl-Shift and clicking on the text frame. I used this to delete the header from the front matter and from the first page of each part and chapter.

### ***Page Number***

On the master pages, position the cursor in the text frame in the header (along with the text, such as the book's title).

Choose Type > Insert Special Character > Markers > Current Page Number.

This will make the correct page number appear in the header on each page of the book (because the master pages are applied to all the pages). You can format the page number by formatting it on the master pages.

### ***Other decisions***

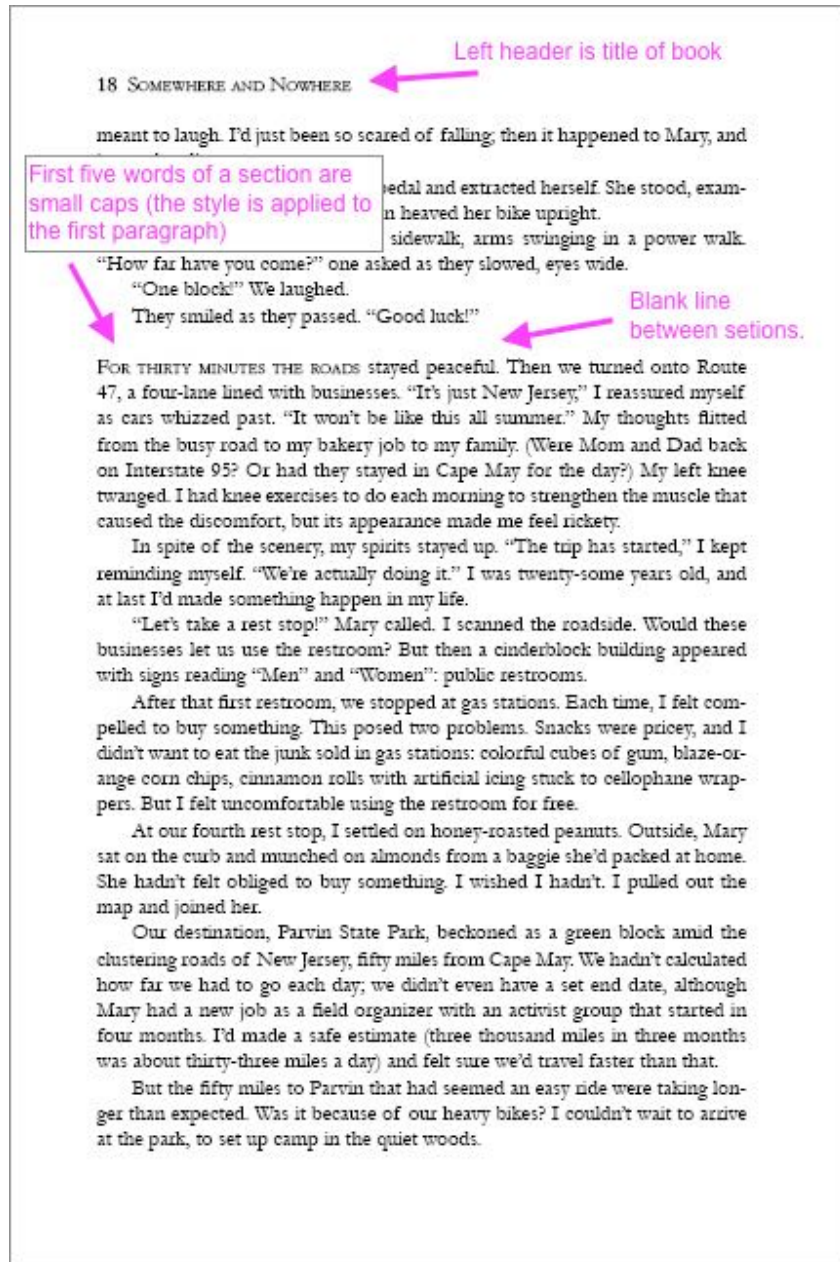
The text of your book should be done before you begin the final layout process. There is no need to apply styles or format text in the word processor (for me, Microsoft Word) document.

If you have front matter and end matter in separate files, now is the time to get it all into one document, in the proper order. There are options for how to order the parts. For example, some publishers put acknowledgments at the beginning. But as a reader, I always skip those because I don't yet care about the author. So, I put my acknowledgments at the end of the book.

Here is the order I used: title page, copyright page, dedication, blank, table of contents, blank, epigraphs, blank, text (prologue, parts and chapters, epilogue), author note and disclaimer, endnotes, photo captions and credits, acknowledgments, about-the-author page.

I decided to allow chapters to begin on the left side to save pages, but all parts began on the right side, as well as special pages like the dedication page, the prologue, the first chapter of each part, and some of the end matter.

I decided to use a blank line between sections. Originally I had something like this: \*\*\*, but the blank line looked more classy. New sections were indicated by small caps, so there would not be confusion if a new section began on a new page (see image below).



Items like the title page and table of contents can be styled however you want. I like to keep things simple and used the same few fonts. I used the chapter title's style for the title of all of the front and end matter pages (like the contents page and the acknowledgments page). I decided not to include the text's chapter titles in the table of contents (see image below).

I only included part titles for most of the book, and I used headline style capitalization, because I thought it looked best

Chapter title style applied here

## Contents

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I chose to line up the right side of the page numbers because I think it looks nice

## Using Styles

### *Character styles*

I have trouble differentiating between character styles and paragraph styles. I think of character styles as useful for accomplishing simple formatting, while paragraph styles are needed for more complicated tasks. For example, I created a character style called Header Left that was Garamond font, 11 point, and SMALL CAPS. I applied this style to the left header in the master pages.

Character styles are also used within paragraph styles. For example, the Drop Cap style seems too simple but is a necessary step to create a drop cap; it is used by the paragraph style called Text First Paragraph.

Here are the character styles I used:

**Header Left:** Garamond 11 SMALL CAPS (applied to left header in master page)

**Header Right:** Garamond 11 italic (applied to right header in master page)

**Drop Cap:** Garamond 11 (used in the paragraph style called Text First Paragraph)

**Text First Line:** Garamond 11 SMALL CAPS (used in the paragraph styles called Text First Paragraph and Text New Section)

### *Paragraph styles*

As I wrote above, paragraph styles can accomplish more complicated formatting tasks. For example, the chapter title must be set to a certain font and size, but I also wanted certain spacing around it; a paragraph style can accomplish this.

Paragraph styles can also use “nested” character styles. For example, I wanted the first letter of each chapter to be a drop cap. There is an option to select a drop cap in the paragraph style menu; to use it, I needed to select the character style I had previously set up for the dropped letter: the character style called Drop Cap.

Note that styles can be created independently or based on an existing style. I based all my styles on “Text” so that if I decided to change the font I was using, I could change it in the paragraph style called Text, and it would change in all the other paragraph styles, which were based on Text.

Here are the styles I set up:

**[Basic Paragraph]:** This is the default style; I used it on introductory material. Garamond 11, left aligned, no indents.

**Text:** I applied this to all the text. Garamond 11, left aligned, first line indent 1p6 (1/4”); hyphenation = 5 letters; I set widows and orphans under Keep options > Keep lines together, using 1 at the start (orphans are okay) and 2 at the end (widows are bad).

**Chapter Title:** I applied this to the title of each chapter. Garamond 14 bold, center aligned. Chapter titles use sentence capitalization.

**Part title:** I applied this to the title of each part. Garamond 24 bold, left aligned, leading 44, vertical scale 130%. Part titles use headline capitalization. I used Return to manually position the words in a nice-looking way. I applied SMALL CAPS to “Part 2:” as an override.

**Text first paragraph:** I applied this to the first paragraph in each chapter. It has the first line indent set to 0. The first five words are small caps (using a nested character style, with Text First Line); the first letter is a drop cap that extends down three lines (using a nested character style, with Drop Cap). Select Scale For Descenders to fix drop caps that go too low. It is especially important that this style be based on Text, so that any changes made to Text are applied here as well.

**Text new section:** I applied this to the first paragraph of each new section within a chapter. It has the first line indent set to 0. The first five words are small caps (using a nested character style, with Text First Line). It is especially important that this style be based on Text, so that any changes made to Text are applied here as well.

## **Inserting Your Text**

### ***How to thread text automatically***

When you place the text from Word into InDesign, you want it to thread automatically from one page to the next. In addition to saving you from manually threading the text boxes, this will create additional pages until all the text is placed.

On page 1, create a text frame that fills the whole page (within the margins). Place the text in this text frame: copy the entire text in Word, select the text tool in InDesign, click in the text frame, and paste. One page will fill with text.

Pick up the extra text at the “out” port, at the bottom right of the text frame.

Hover over page 2, hold down Shift (the cursor icon should change into a squiggle), and click in the top left corner of page 2, in the margins. The text should appear, and should flow into as many pages as are needed. (You don’t need to draw a text frame on page 2; just click in the corner of the page, and the margins will be used for positioning.)

Note: I tried holding Shift and placing the text on page 1, and it did not work.

Once the text is placed, you have two versions of your book: the Word document and the laid-out InDesign document. You may want to keep both up to date, for example, if you plan to use the Word document to create an ebook. So, if you make changes in one document, you must make

them in the other. If you hire a proofreader, to read the “proofs” before they go to press, this might generate some edits to be made in both places.

InDesign now has some capability to keep a Word document linked to the InDesign file; in Preferences, check the box to keep the two linked, and use Ctrl-D to place the text instead of copying and pasting as described above. Updates made in Word will transfer to InDesign, but any changes made in InDesign will not be saved. You can unlink the two in the Links panel’s dropdown menu. I chose not to use this feature because apparently Word’s styles also transfer, and I was trying to keep my InDesign file as simple as possible.

### ***How to add breaks***

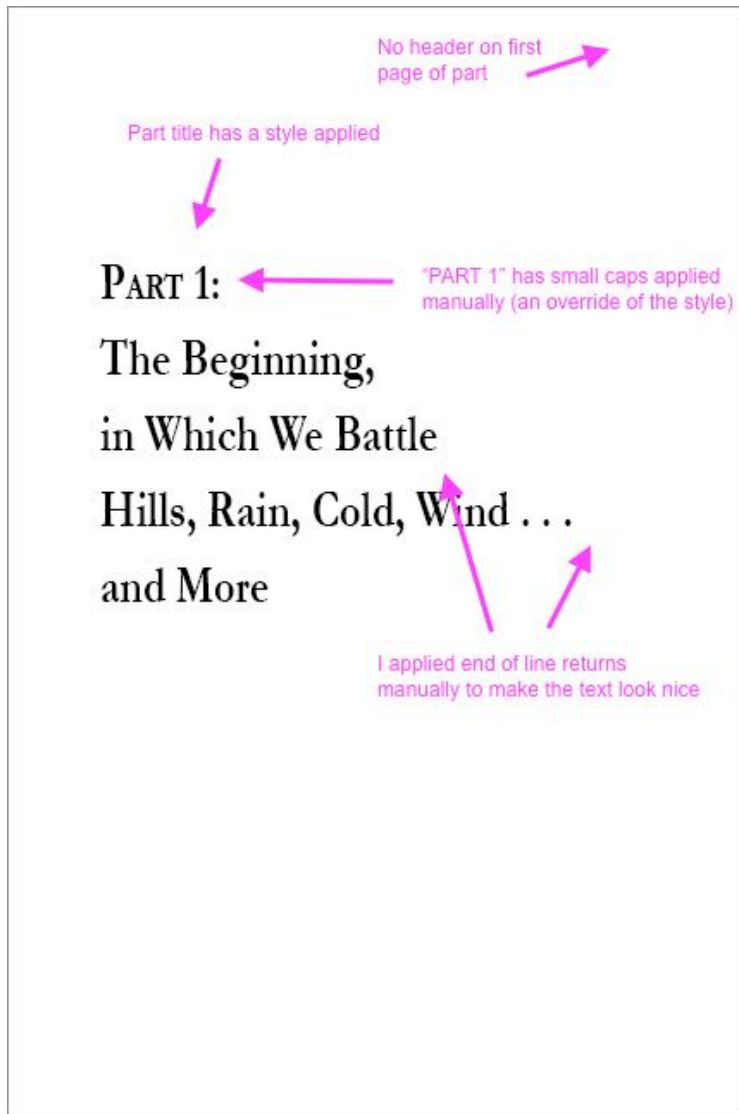
I had decided to start each part on the right page. I used an odd page break to move the text: Position the cursor at the start of the part title. Choose Type > Insert break character > Odd page break.

I lowered the top of the text frame on the part title page to 13 inches on the ruler. (I used this number to position the text in the same place on every part title page.)

I applied a style to the part title, and then manually formatted “Part 2:” with small caps. (Note: the text must be lowercase for small caps to show up.)

I deleted the header from the page, as described above. (See a sample page below.)





I had decided that chapters could begin on either the left or right side, except for the first chapter in each part, which would start on the right. (I actually wanted all the chapters to start on the right, but so many blank pages resulted that I changed my mind.) I applied an odd page break, as described above, where necessary.

On the chapter title pages, I moved the top of the text frame to 27 inches on the ruler. I deleted the header. I applied the Chapter Title paragraph style to the title. I positioned the photo with space around it, but eyeballed instead of measuring, because the photos were all different sizes; I applied a drop shadow to the photo. I inserted one blank line between the title and the text. I applied the Text First Paragraph style to the first paragraph to create the drop cap and other features. (See a sample page below.)

No header on first page of chapter



Photo has drop shadow

First five words are small caps, first letter is drop cap

## Prologue

Chapter title has style applied

**I** SAW THE ROCKY MOUNTAINS ON the third of July. At first I thought they were a low bank of clouds, hovering over a blue haze at the horizon. Unsure, I watched as I pedaled, hoping they'd resolve into clouds or mountains.

The sun beat on my back. I moved slowly, pulling my hundred-pound bike up a hill until I crested it and rolled gratefully down the other side. The forms at the horizon disappeared behind a distant butte, then emerged unchanged.

The road started up a taller hill, and I shifted to my lowest gear and settled in for the climb. It was two months since Mary and I had left from the beach in Cape May, New Jersey. Before that I'd been in North Carolina, working in a bread bakery. What was everyone in the bakery doing right now? I checked my watch—almost noon. The bakery shift finished at noon.

*But I'm in Wyoming,* I remembered. It was two hours earlier here. The bakers would already be done.

I'd gone to Chapel Hill, North Carolina, to attend graduate school in chemistry. I liked chemistry, but it wasn't all I wanted to do. I always had this feeling that somehow life would *really* start when I finished school. But then, as the end had neared, I'd caught myself thinking, "I'll get a job for a few years, and *then* life will start."

## The Running Head

If you want the title of the current chapter to appear in the header, you must create a variable for a running head. This is a complicated task so it gets its own section.

You must already have created a paragraph style for the chapter titles and applied it to the chapter titles throughout the book. (See previous section on styles.) I called this style “Chapter Title.”

Position the cursor in the header on the master page—I put it in the right header.

Choose Type > Text variables > Define.

Choose New (I called it “Header Chapter Title”); the type is Running header; the style is Chapter Title; select “use first on page” to make the header look for the first text on the page with the “Chapter Title” style applied.

Choose OK.

Choose Insert and <Header Chapter Title> will appear. This is the text variable.

Choose Done.

The style of the running head (font, size, italics) is set by highlighting the text variable on the master page and applying a style to it or manually formatting it. I chose italics for the text variable and regular type for the page number. An example is shown in the image below.

Running head: chapter title appears in right header until a new chapter title is used

Eastern Pennsylvania, in which it starts to rain 31



Chapter title

### Eastern Pennsylvania, in which it starts to rain

THE ROAD REMAINED PEACEFUL ALL day. Mary and I only stopped once, at a gas station where we sat on the curb to eat snacks as clouds moved into the sky. A woman hobbled over from the house across the street to meet us, and asked if we'd send her a postcard. Her name was Dolores. Mary wrote down her address.

"Make sure you see the view from Grasshopper Level!" Dolores said as she turned to go.

"What time is it?" Mary hadn't found her watch and feared she'd left it at home.

"Twelve-thirty. Should we stop in Strasburg?"

"I don't know—let's just wait and see when we get there." The words were our new motto: let's just wait and see. Things could be totally different by Strasburg—maybe we wouldn't even *reach* Strasburg! Maybe we'd meet another Joe, who'd invite us to stay at his house. I fought against my impulse to make a plan and tried to be open.

As clouds built in the sky, I fell behind Mary. Although I sometimes started in front, she rode faster than I did. She'd wait in Strasburg, I told myself. Still, I found myself passing scenery without stopping for photos. I imagined that

Mary would be annoyed if she had to wait long, and my imaginings made me anxious to catch up.

The air began to speckle with rain. I stopped to put up my hood, under my helmet.

The road flattened at the top of a hill, and a panoramic view spread below. I stopped in the quiet drizzle. This had to be Dolores's "Grasshopper Level"—I'd need six photos to fit it. A pattern of green and brown rectangles filled the valley. Barns with silos, tractors, horses, and houses dotted the landscape, while a railroad train moved across the middle of the scene—not a sleek silver Amtrak, but a black engine billowing smoke, pulling an assortment of cars. The view called to mind the 1855 painting *The Lackawanna Valley* by American artist George Inness. I'd spotted Lackawanna on our map to the north and thought, "It's probably ugly by now," but this valley looked just like the painting, as if Grasshopper Level ran past a special window that looked back in time.

The drizzle increased as I neared Strasburg. I pedaled into downtown, where the wet street reflected the traffic lights and the headlights of slow-moving cars. Through the rain, I scanned the eighteenth century brick storefronts and railroad-themed decor. I didn't see fast food restaurants or chain pharmacies. Mary's bike leaned under an awning outside a coffee shop. Strasburg was the epitome of the small town I hoped to find across America.

I leaned my bike near Mary's and went in. My coat dripped on the floor while I wiped my glasses. As I got my bearings, I spotted a coat rack. Was it safe to leave my gear? No one would take it, I told myself. I'd been leaving my bike unlocked, too. I liked the idea of trusting, but it was hard to feel it one hundred percent.

Free of my dripping gear, I got a mocha with whipped cream and found Mary in the back room, in an upholstered wingback chair. I sat by her and pulled out the map. We were five miles south of Amish country.

"Maybe we should stay in a campground," I said. "Amish country is touristy, so they might not allow camping just anywhere. And it might be easier in the rain." I also wondered if the Amish might spurn women bikers camping behind their churches.

"Okay." We picked a campground called Lucy's.

Knowing where I'd sleep, I relaxed. "Look at me!" I thought, "in my posh wingback chair with my fancy coffee drink!" Even with the rain, the bike trip kept turning up good things. I opened my journal and began to write.

Once, the door jingled, and an excited man walked straight to the back room. "Are those your bikes?" he asked. "My wife and I go touring!" He proceeded to tell us about the trips they'd been on. Before leaving, he gave me his card and said, "In case anything goes wrong in the next fifty miles."


Long chapter titles can present a problem—the title text squishes itself into the header. I tried a few fixes that didn't work:

- You cannot change the style of part of a sentence (manually formatting the title to make its second half not appear in the header).
- You cannot use Return to break the sentence into two paragraphs—if you do, the second part of the title appears in the running head on subsequent pages.
- You cannot use of Shift-Return; this creates a line break but does nothing to the header, because the entire title is still one paragraph.

Here is what worked: Choose the text you want in the header, and use Return to break the chapter title at the end of this text. Then manually format the second half of sentence, so it matches the first half in appearance but does NOT have the Chapter Title paragraph style applied to it. The second half will not be used in the header. An example is shown below.

Running head includes first two lines of chapter title, minus the comma

Southwestern Montana, in which I pretend at being able to talk to a guy 221



I used Shift-Return here to create a new line (to make it look nice) without separating the following text from the title

I used Return here to separate the following text from the title

**Southwestern Montana, in which I pretend at being able to talk to a guy, and it kind of works, and then I sit still**

This comma is not part of the text, but is floating in a text box

The third line does not have the chapter title style applied; if it did, it would start appearing in the header; it has the default style, with the size and other characteristics applied manually

THE AFTERNOON REMAINED OPPRESSIVE AS I pedaled, on and on up the grassy slopes. A dull pain throbbed in my forehead. That morning, just outside of Dillon, I'd stopped to take a picture of   
 had flown up my helmet and stung me.   
 up barren,   
 it grassy slope.   
 The road climbed two mountain   
 Pass, a climb of 1664 feet to a   
 d into a valley, and after several   
 again, up Big Hole Pass, 7630   
 feet high.

Now as I topped the second pass, I pulled up next to Mary and stared at the view: more brown hills, more far-off blue peaks. We'd covered most of the day's forty-one miles. The needle-pinch of the bee sting returned, reminding me to notice the dull pain. I scrubbed at my sweaty forehead with the bit of bandana that poked out from my helmet. After a minute of pretending to

admire the scenery, I set off, doggedly heading for Jackson with Mary behind me.

We coasted down the pass and onto a flat road. Dirt powdered my legs; if I peeled back my socks, I'd have a line. I hadn't taken a picture since the beehives; nothing had seemed beautiful. As the sun descended, the scenery's colors changed: the brown fields showed hints of green, and blue mountains turned lavender. But even with the evening colors, the view looked hot and boring. "Maybe it would seem beautiful if I weren't so hot and tired," I thought. We had to be close to Jackson, but empty road kept coming at me.

I rounded a bend to find a crowd of orange construction signs clustered on the shoulder, turned every which way as if they were mingling at a party. Then buildings appeared. Mary rode up beside me as we neared the town.

A young man walked along the road, drinking a beer and watching us approach. He wore sunglasses and seemed kind of cute. Mary and I pulled over and introduced ourselves. He was Ryan.

"Are you on the GoBike route?" he asked.

"He must be used to bikers coming through Jackson," I thought. For some reason, I didn't want to seem ordinary.

"No," Mary said, "but we keep meeting them." After describing our trip, Mary asked if there was anywhere to camp.

"Not really," he said. "There's not much of anything here." He spoke with a slight smile.

"Is there a church? Or a school?"

"There's a school on the left after you go through town. Church is on the right."

"Do you live here?" I asked. I couldn't imagine why he would, in the middle of nowhere, especially because he spoke as if he didn't like it.

"Yeah, I work at the hot springs. It's the big building up ahead. I'm working tomorrow morning—if you come by, I'll let you in."

"Thanks! What time do you open?"

"Seven."

"I'll be there right at seven," I said as we pushed off.

We passed a log building labeled Jackson Hot Springs. The other buildings were unmarked, possibly deserted, with sheds and rundown equipment surrounding them. No traffic or people stirred. A convenience store was the only place open. Mary headed to the restroom, so I approached the woman behind the counter with my empty water bottles.

"There's a hose outside," she ejected, jerking her head at the door I'd just come in. Then she turned away.

"Thanks," I whispered and hurried out.

Tips: I wanted each header to be a complete thought, so I broke the chapter title at a place to make this occur. But I also wanted the chapter title to look nice on page, and sometimes it would look awkward, with the first part comprising a long line of text and a short line of text, followed by the second part (after my Return) being another long line of text. To make the three lines more even, I used Shift-Return to insert a line break without creating a new paragraph. I also didn't want the header to end with a comma, so I deleted the comma from the chapter title text and inserted a text box with a comma.

### Photos

Your printer will have specifications to use when scanning photos or line art. I scanned my photos at 300 ppi, in grayscale, and saved them as TIFFs. (For line art, 1200 ppi is best, but 600 ppi is okay.)

To position the photo, I centered it horizontally, made it closer to the top vertically, and looked for the white space to form a nice-looking frame around it.

I applied a drop shadow. Select the photo. Choose Object > Effects > Drop Shadow. I kept all the defaults except distance 0p3. (Defaults: opacity 75%, angle 135, x/y offset 0p2.121, size 0p5, mode: multiply, YES=object knocks, spread/noise 0%.)

## **Miscellaneous**

### ***Table of contents***

There is a way to generate a table of contents (TOC) automatically. It depends on each item that will be in the TOC having the same paragraph style applied in the text. The TOC is pulled from the document using this style.

My TOC included items from the text that had two different styles applied, and it only included some of the chapter titles, so I could not create it automatically.

### ***Lost formatting from Word***

I used italics and superscripts in my text, and they were lost when I pasted the text into InDesign and applied a paragraph style. I fixed them all manually. There is probably a better way to do this; perhaps placing the text (using Ctrl-D) instead of cutting and pasting, and using the default style for the main body of text, would maintain the formatting from Word.

### ***Final steps***

After the proofreader edited my document, I scanned it for awkward looking orphans or hyphenation, which I fixed manually.

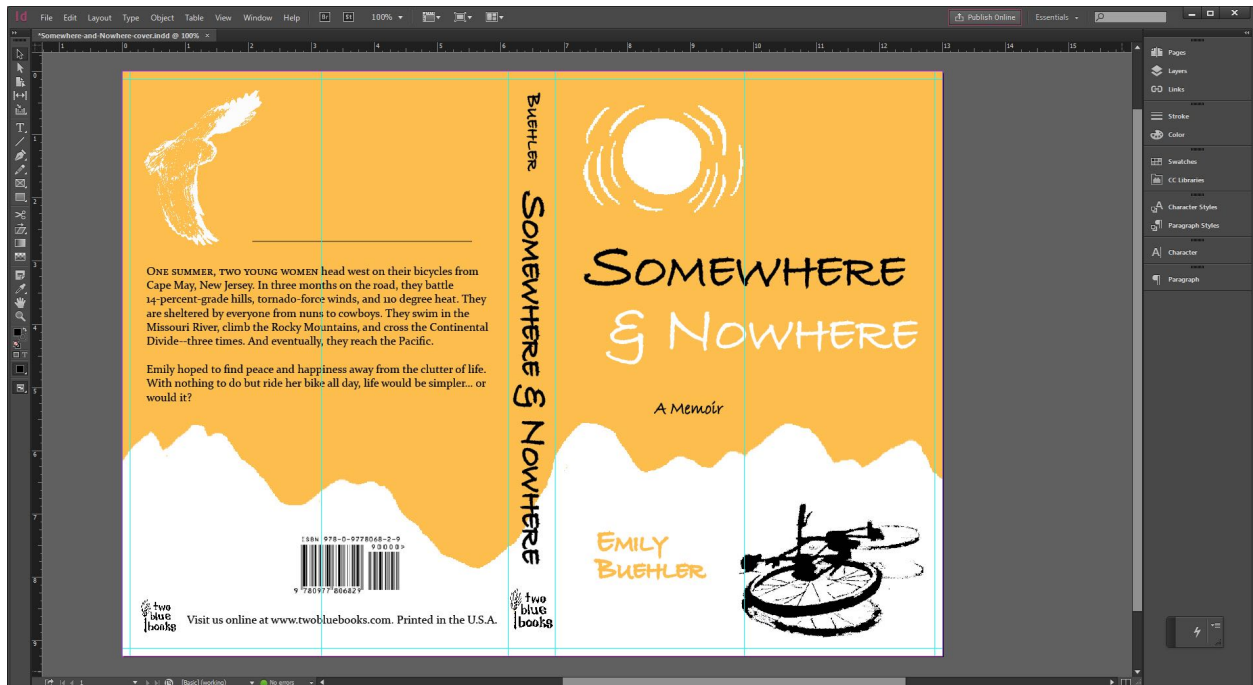
## **Cover**

Your cover will be a separate document. Before you can design it, you must do the following steps.

- Get the final page count of your book.
- Choose a page size and a paper type from your printer.
- Get the book's spine size, based on page count and paper type. My printer has a calculator on their website.

Set up an InDesign document for the entire cover (back, spine, and front) using the page size, and adding a border to allow bleed. My printer specified an 1/8-inch bleed. Here's what mine looked like at one point during production, with guidelines delineating the bleed area and back, spine, and front:





If you are designing the cover, look at books you like. Consider the front, spine, and back, each of which is designed. List all the elements you will need, like your publishing company logo and your barcode. I designed a one-color cover because it is cheaper to print than full-color. Also, I wanted a simple design because I was making it myself.

The images that are placed on my cover are Photoshop files (not lower-quality jpegs).

My printer takes the cover as an InDesign file, along with the font files of the fonts used. I made sure to delete any extra fonts that appeared in the Find Fonts box (fonts that I wasn't really using, that were defaults and had appeared there) by changing them to fonts I was using.