

Project 1 – InDesign Tutorial Feedback  
**Anne Moore, Rebekah Crosson, Dorothy Knosby**

An excellent start overall with project one. You have a well-illustrated tutorial with numbered steps and a convincing project assessment. As you revise for your individual portfolios, here is what you need to do:

Include the version number on the title page.

You have a good and useful introduction. You forecast what users will learn, the scope of the tutorial, and describe audience for the tutorial. You've usefully included the approximate time needed to complete the tutorial. Also, best if you forecast the typographic conventions you've used, like the use of bold and quotation marks for menu items and for keystrokes to be entered.

Don't give novice users choices/options unless you must. Be directive. Tell them what size, approximately, to make the needed textbox on page 5, for example. Novices often feel they don't know enough to make wise choices so remove that worry whenever you can.

Define the purpose of each section and any key terms. For example, why are users inserting placeholder text? The purpose is to visualize a layout and edit it before inserting the actual text and graphics, right? So, define placeholder text and/or *lorem ipsum* for users who are tech comm students. Include a brief overview or purpose statement for each major section of your tutorial. You do this well for the Parent Page section, for example. I suggest that you move away from the centered red text for these sub-sections and instead consider something like flush left black text on a light-colored rectangular background.

Make your own page layouts more consistent. You've used a magazine style with graphics that appear right aligned in a two-column format, centered in a single column layout, and in one case, a full-page graphic. Better to set up a multi-column layout with a consistent gutter between the columns as most professional tutorials are setup. The gutter need not be centered. You can give one column to text and one to graphics consistently. Size and crop the graphics to fit the column. Too many of your screen captures are very large with very small areas of interest highlighted (p. 7, 11, 12, 13, and 14). The alternative would be to go to a single-column layout but position the graphics below the text that introduces them. You do this in places, but then align the graphic to the left and introduce a narrow column beside it to the right, but not consistently. Please replace the poorer quality illustrations with more deliberately sized and cropped versions.

Create visually distinct styles for menu items, for text entered into fields, and for any warnings or notes. You could make more use of color to help users recognize each type of information quickly. I like very much that you have included icons from your screen captures directly in your written instructions in places as well as highlighting them in the accompanying graphics. I think you could do even more of this effectively (see p. 5 & 6). Turn off hyphenation throughout.

You have a useful conclusion that lists what users should have learned and links to a troubleshooting resource – other Adobe tutorials. I think you can live without pointing them to Google.

Tentative Grade: A



TO: Dr. Gregory Wickliff  
FROM: Anne Moore, Rebekah Crosson, Dorothy Knosby  
SUBJECT: ENGL4181/5181 Spring 2022  
Project 1 Assessment Memo  
DATE: March 2, 2022

Team members of Group 1 for Project 1 were Rebekah Crosson, Dorothy Knosby, and Anne Moore. The team members are all graduate students with extensive writing experience and are professional teachers. Dorothy was new to InDesign although she had excellent Photoshop skills. Rebekah had some previous InDesign experience. Anne had recent InDesign experience since she had taken the Information Design and Digital Publishing course in the fall. Dorothy and Rebekah quickly mastered the basics of InDesign the very first week we were working on the project. Our task was to develop a tutorial to teach novice InDesign users who are technical and professional writing students at UNC Charlotte. We outline the tasks we covered in our tutorial below. *gmd*

### Process

As Anne had the most experience with InDesign, she maintained the master InDesign document. Dorothy was the Photoshop expert and edited some images that required more manipulation than just cropping. We reviewed the various techniques for taking screenshots from Windows devices. After the initial draft, we named and saved our screenshots as high quality .pngs for maximum clarity. Rebekah was the text expert and wrote major sections of the documents we worked on in class such as the Planning Memo, Combined Analysis and Revision Plan, Usability Tests 1 and 2 Report, Usability Test 3 Report, and Peer Review Report.

We divided up the tasks to be covered in our tutorial as follows and at each step we were responsible for editing our own sections:

1. Anne Moore: Following the instructions, the participant will open Adobe™ InDesign® 2022 and create a new letter-sized document. They will name their completed file and save it in Adobe™ InDesign® 2022.
2. Anne Moore: The participants will create a textbox and fill it with placeholder text.
3. Dorothy Knosby: The participants will create a heading style in a specific typographic style.

4. Dorothy Knosby: The participants will apply the new style to headings in the document and name the new style.
5. Rebekah Crosson: The participants will create a paragraph style.
6. Rebekah Crosson: The participants will apply the paragraph style to the text in a textbox.
7. Anne Moore: The participants will use the parent page function to apply page numbers and a running header to the document.

We composed all of our memos and documents other than the tutorial itself in Google Docs because that allowed us to work collaboratively on our writing tasks. We were all heavy users of Google Docs and excellent writers, so the writing process went smoothly. Once we finished a memo, we each downloaded it to our personal drive as a Microsoft Word document and then as a pdf. Anne submitted the memos during class, but Rebekah and Dorothy also uploaded them to Canvas before the deadline.

We began writing the text for the InDesign tutorial in Microsoft Word. We quickly found that we had to reformat it significantly once it was in a textbox in InDesign, so after the initial copying and pasting, we performed most of the editing directly in the InDesign document.

We agreed to use the terms “drop-down menu” for the options across the top of InDesign, “toolbar” for the source of major tools on the left, and “panel” for all of the other tabs or menus that appear when you select a tool from the “drop-down menu.” We used imperative language throughout, except for in the notes and comments, which were more informal.

### **Usability Test Mechanics**

For the first two usability tests, we had Group 2 members use InDesign on one of our laptops and scroll through the tutorial on another of our laptops. This approach proved to be very challenging for the participant because they had to scroll through the InDesign file and look back and forth to the open InDesign file on the other laptop to perform the task. For the third usability test, we printed out the pdf of the tutorial and the individual turned the pages while performing the tasks on one of our laptops that had a pristine InDesign interface. Giving the participant a printed version of the tutorial while they worked on a laptop worked much better. When we asked the follow-up questions, the participant had to flip back through the pages to locate problem areas, but they had to scroll on-screen using the other method. Asking the participant to manage two unfamiliar laptops at once was overwhelming. We found that InDesign remembers where the panels are from last use and we had to learn to reset everything from where we had it arranged when we were last editing the tutorial on our laptop in InDesign.



## Key Suggestions from Usability Tests and Peer Review

The major comments on our tutorial related to: fuzzy images, image sizes, arrows covering text, too much white space, inconsistent use of terminology, sentences that were too long or too short, and color for the comments. We addressed these issues gradually with major edits after the usability tests and then again after the peer review.

We learned from Usability Test #3 that it was confusing if we let the text span across the page from left to right with the image below the text. We went through the tutorial after the usability test and created two columns in most areas, so that the text would be on the left and the image on the right. This technique made the flow from text to image much easier to follow and eliminated large blocks of white space. *(good!)*

## Challenges

All three of us use Windows PCs and laptops exclusively, so we had to prepare our tutorial for Windows PC users. We could not incorporate alternate instructions for Mac users. We tried to make this limitation clear in our tutorial. *(fine)*

The major challenge was that we had to pass the InDesign document back and forth between us and that caused the links to the images to break. After the initial draft, Rebekah realized that the question marks and link errors don't show in the pdf version that is exported from InDesign, so we stopped worrying about the original location of the images. We still had to pass the InDesign document back and forth and the only way it worked was to email it as an attachment to the next person with a new file name. We had to carefully plan who would work on it when. We learned that the easiest way to organize the work in the middle of the project was for the individual to edit their pages and send their revised InDesign file. Anne would move the revised pages into the master InDesign file while deleting the previous versions of the pages. This approach was acceptable until we had to edit the text for consistent writing style, develop standard naming conventions for InDesign menus and terms, and check the entire document for inconsistencies. Anne performed this task after the post-usability test corrections and again after the peer review. *(✓)*

Another challenge Anne ran into during the editing of her task on applying a Master page is that Adobe suddenly changed the term "Master" to "Parent" between the usability tests and the peer review. She had to replace the screenshots and edit the text of the tutorial accordingly.

*yes, but probably  
a good thing to  
change*

Another challenge was that Anne preferred to use a graphic to label the steps while Dorothy and Rebekah preferred to use arabic numbers next to the text instead. We agreed to allow that discrepancy to stand as only the peer reviewer commented on it.

### **Goal Accomplishment**

We took the assignments for this project seriously. Each of us learned many new skills in InDesign. We also learned how to plan, write scripts for, conduct, interpret, and incorporate suggestions into tutorials as a result of usability tests. We also expanded our writing and editing skills for user documents. ✓

### **Teamwork**

The team worked cohesively together throughout the project. We worked diligently during each class session often starting at 5:15 p.m. and staying past 9 p.m. We worked individually on the weekends and the week nights before the next class meeting to complete as many of the tasks that would be due on a given class night as possible, so we could maximize the time together for group work. We were not able to meet synchronously between classes because of work and class schedules. It was a highly productive group. We are extremely satisfied with the resulting tutorial. Our strong work ethic and excellent baseline skills enabled us to build our expertise and produce a quality product.

**ENGL5181**  
**Project 1 Style Guide**  
**Group 1: Anne Moore, Rebekah Crosson, Dorothy Knosby**  
**March 2, 2022**

**Page Format – edit for consistency**

Size - 8.5" x 11"

Orientation (tall or wide) - Portrait

Margins - 0.5 on all 4 sides

Header - A running head on the right side in the margin in Georgia Size 12 "InDesign: Text, Styles, and Page Numbering"

Footer is the Page numbering - Page # on lower right side in the margin in Georgia Size

Columns - One column 7.5" x 10"

Colors - the Headings and diamond borders around step #'s in certain sections are in Red  
C=15 M=100 Y=100 K=0

**Typography – edit for consistency**

Document title - Tahoma Bold 24 pt white centered in a textbox with  
C=15 M=100 Y=100 K=0 fill

Heading 1- Script MT Bold Regular 36 pt C=11 M=99 Y=96 K=2 left-justified

Heading 2 - Georgia Bold 14 pt C=15 M=100 Y=100 K=0 centered

captions for illustrations (font, face, size, case, placement, emphasis) - Use arrows to direct eye to the illustrations from the text

Menu items, as represented in the text (icons, font, face, size, case, placement, emphasis)

Key strokes, as represented in the text (icons, font, face, size, case, placement, emphasis)

Spacing (leading & kerning- usually normal but may be compressed for copy-fitting)

Cautions/ warnings - Georgia Bold 14 pt C=15 M=100 Y=100 K=0 centered

Comments - Georgia Bold 14 pt C=100 M=0 Y=0 K=0 centered

Hints (font, face, size, case, placement, emphasis)

Steps - In our group of three, one person preferred to use an image for the step number and the other two preferred text

Other list items (numbers, bullets, font, face, size, case, placement, emphasis)

**Mechanics**

Abbreviations to use after first reference - None

Acronyms to use after first reference – None

Capitalization - Capitalized InDesign terms and software names - Fill, Stroke, Save As, etc.

Hyphenation - Turned off.

In-text definitions - Added as notes.

Quotation marks - Smart quotes

Spelling - American- English

## Usage

Imperative voice - Second person direct address of reader is optional – Used “you” when imperative was not appropriate, to engage the reader, and make it more conversational and informal in certain sections.

Gender references - Used “they” a few times, but “you” was the predominant term in order to remain gender neutral.

## Figures & Tables

Captions (include figure numbers & titles?)- No captions used. Instructions were written to lead the participant to the figure (read: image) without the need of captions.

Consistent size, cropping, and placement- After three usability tests, it was agreed upon that all three group members should attempt consistency by ensuring photographs are large enough to be clear. All photographs were cropped enough to show the necessary elements within the image that are relevant to the related textual steps. In regard to placement, vertical photographs included vertical text, and were placed on the right-side, whereas, horizontal images were centered and included horizontal text.

In-text references to figures & tables (font, face, size, case, placement, emphasis)- Bold font was utilized to show specific text that references the figures (read: images). The bold was implemented on the standard 14pt Georgia font style, [Black] C= 0 M= 0 Y=0 K= 100. The placement is within the text when needed. The bold font shows emphasis on certain names and features that are considered important in the instructions.

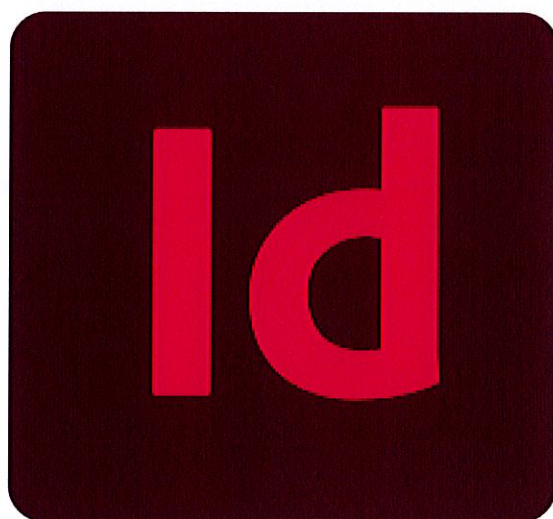
Units of measure (inches, centimeters, picas, points, etc.)- The overall layout was formatted by inches, with ½” margins around all pages. There were no specific units of measure used within the instructions.

Decimals aligned vertically (decimal tab setting in a table of contents, for example)- Decimals aligned vertically and left-justified to match the rest of the text.

Typography & punctuation of elements such as lists, headings, titles (none, final periods, serial commas, font, case)- Since there are no captions, there is no specific typography for figures & tables. However, the instructions were written with 14pt Georgia font style, [Black] C=0 M=0 Y=0 K=100. There are some areas of text which indicate importance and they use 14pt Georgia font style [Red] C=15 M=100 Y=100 K=0. There are some areas of text that show completion of a task and they use 14pt Georgia font style [Cyan] C=100 M=0 Y=0 K=0. Heading titles for each section consistently utilized 36 pt Script MT Bold font style, [Red] C=15 M= 100 Y=100 K=0.

**Adobe™ InDesign® 2022**  
**Text, Styles, and Page Numbers**

+ Version #  
17.1



*Anne Moore, Dorothy Knosby, and Rebekah Crosson*

**March 2022**



# Introduction...

This tutorial is a step-by-step guide to a few basic tasks in Adobe™ InDesign® 2022 (InDesign). The audience is novice users who are technical and professional writing students at UNC Charlotte. The tutorial is written for Windows PC users and does not include instructions for use of InDesign on a Mac device.

The tutorial provides instructions on how to:

- 1) set up, name, and save an InDesign document;
- 2) create textboxes and fill them with placeholder text;
- 3) create a heading style in a specific typographic style;
- 4) apply the new heading style to headings in the document;
- 5) create a paragraph style;
- 6) apply the paragraph style to the text in a textbox; and
- 7) use the parent page function to apply page numbers and a running header.




The tutorial is simplified and customized to get students in UNC Charlotte courses quickly into using InDesign for their coursework. The students in these courses may have a wide range of experience with Adobe InDesign from no previous experience to advanced professional experience. These students are preparing for professional positions as technical writers, graphic designers, usability experts, and other related careers.

The tutorial is intended to be open next to a blank InDesign document and followed step-by-step as the student works through the tasks. By the end of the tutorial (which should take 25 minutes to complete), students will be able to repeat the tasks independently and build their expertise with other tutorials that focus on other basic InDesign tasks.

→ OK PRINTED AS IN YOUR TEST. ?

sent

# Create an InDesign Document...

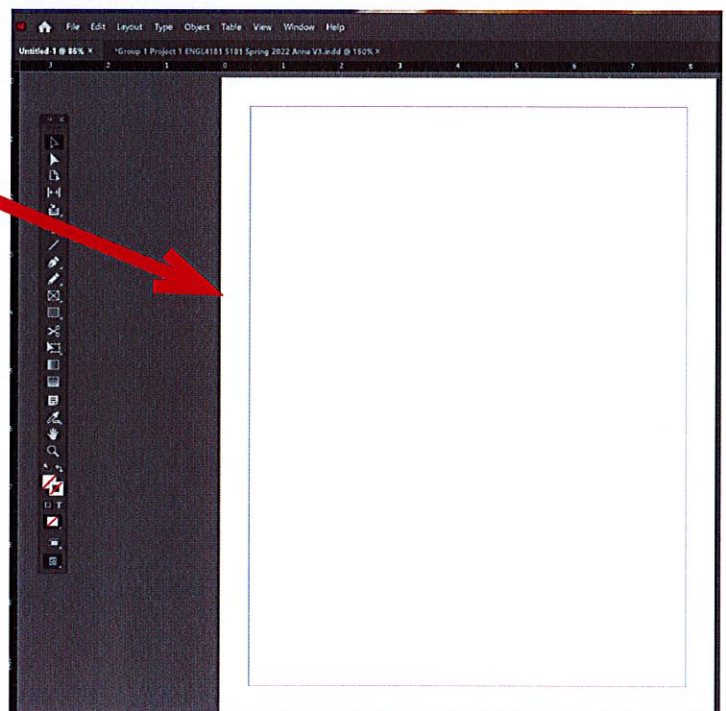
- 1 Download and install Adobe InDesign on your computer.
- 2 Double-click the  desktop icon on your computer desktop, or, select Creative Cloud  from your list of applications on your Windows  menu and open the latest version of InDesign from the list. Wait while the application loads.
- 3 Double-click on "Letter."

*good use of icons!*

*TURN OFF HYPERLINKS IN THE TEXT THROUGHOUT*

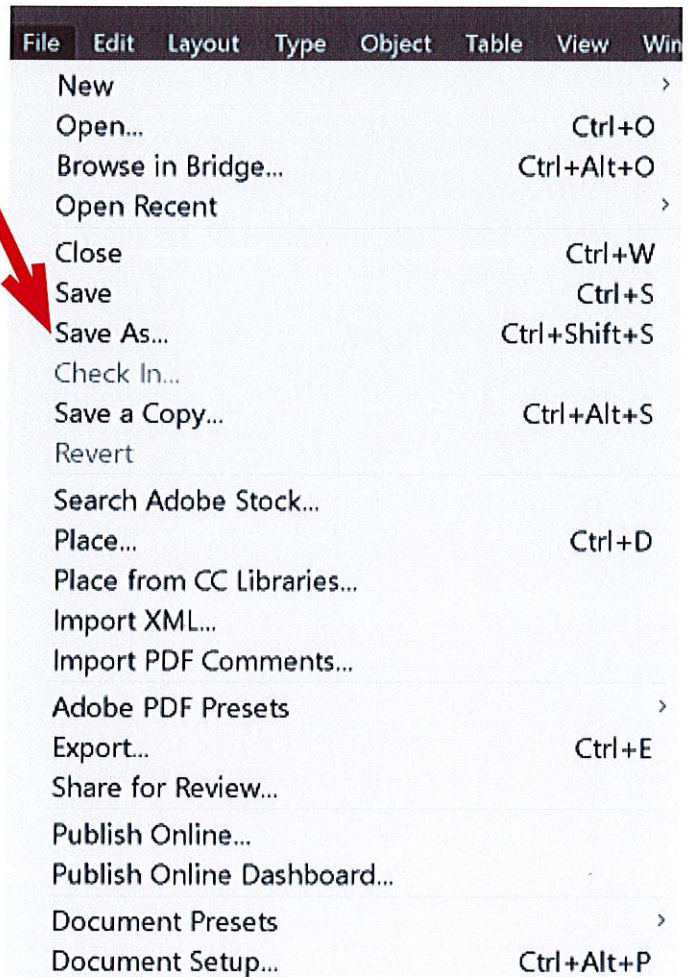


- 4 A blank letter-sized document will open.

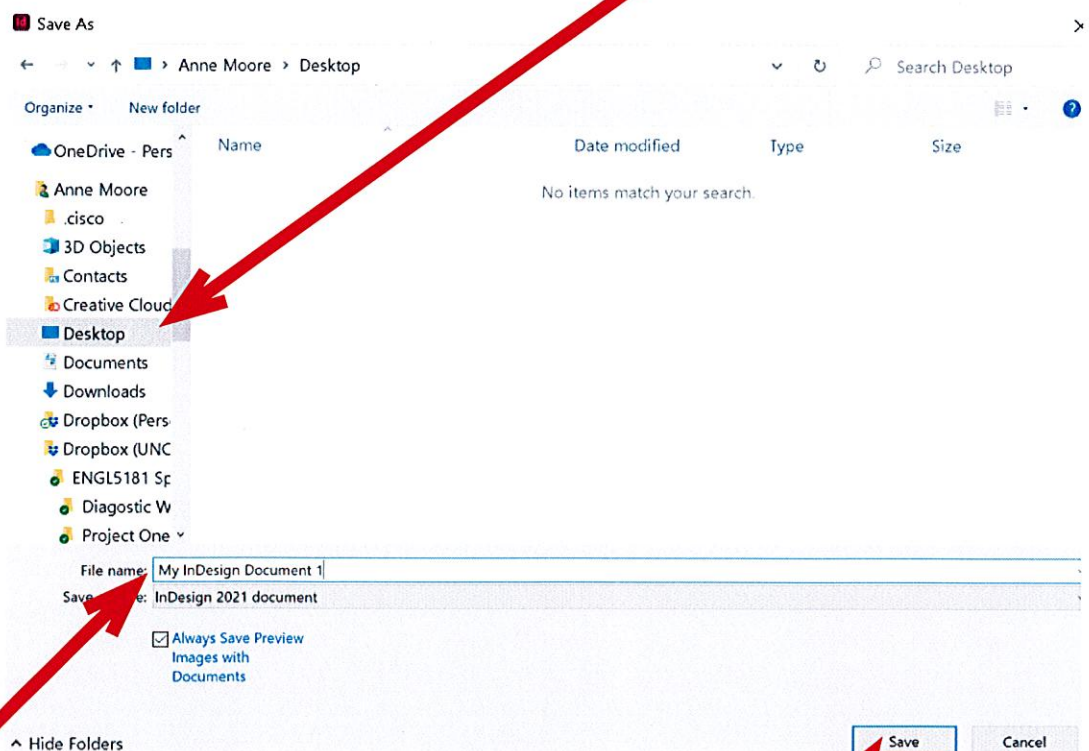




- 5 Click on the “File” drop-down menu and select “Save As.”



- 6 Click on the folder where you wish to save your document. (“Desktop”).



- 7 Type a Name for the file in the “File name:” field. Click the “Save” button.

# Create a Textbox with Filler Text...

+ OVERVIEW SENT. 1ST - WHY DO THIS?

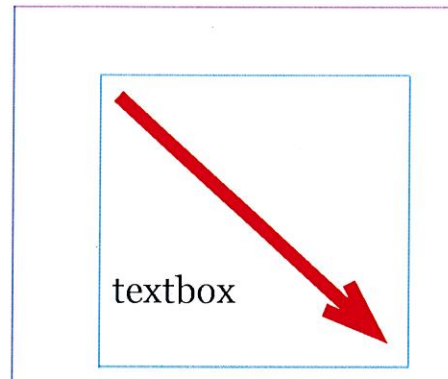
- 1 Click on the white **T** on the vertical "Toolbar."

COULD YOU USE THE  
ICON ~~HERE~~?



- 2 Click in the document and hold down the mouse button while you drag down and to the right to create a textbox of any size.

BETTER TO PROVIDE  
AN APPROXIMATE SIZE



- 3 Right-click inside the textbox to bring up the fly out menu.  
Left-click on **Fill with Placeholder Text**.  
The textbox will be filled with Lorem Ipsum filler text.

Paste	Ctrl+V
Font	>
Size	>
Find/Change...	Ctrl+F
Spelling	>
Text Frame Options...	Ctrl+B
Anchored Object	>
Change Case	>
Show Hidden Characters	Ctrl+Alt+I
Insert Footnote	
Insert Endnote	
Insert Variable	>
Insert Special Character	>
Insert White Space	>
Insert Break Character	>
<b>Fill with Placeholder Text</b>	
Tag Text	>

Amusa eum que ea volo odipisc itesto  
bearum ab intianda quis idiossi taturi  
cuptatem id elesti de por molut occus aciet  
laborer iostore nusci aut istori tet harum  
aut estrume nihicillis ent, officae etum dit  
et erro molorer ibusam ea verions equunt,  
solutpas ipsam dit volecatiis etur, voluptaest  
quidis eiume nonsector re, voluptiis expe  
molupta tionectemqui officias min perupta  
tibusam is as aut enditium hil iunt lam as  
dem con con planit dem dollaut aliquibus  
et, odi adignatem solor auditis et faciaep  
erchitemqui desed ea quiam, cuptatur?  
Henimporum fugiasp elleseq uatius.  
Aborepuda imporporepta vellora eritatio

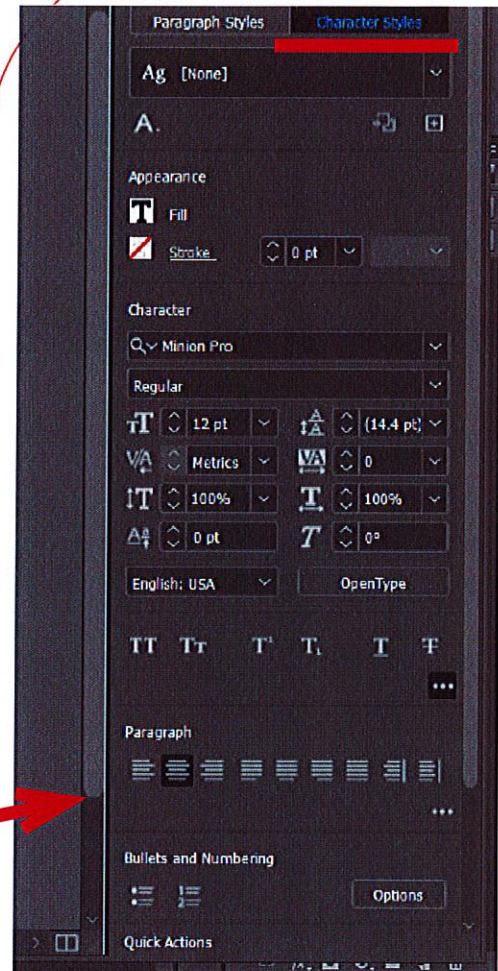


# Creating a New Heading Style...

+ OVERVIEW 1<sup>st</sup> - WHY DO THIS?

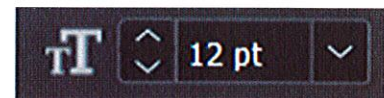
1. Create a new blank textbox at the top of the page (following steps 1 and 2 under *Create a Textbox above*). In the new textbox, type in the word "Heading" and center it, using the center button found in **Properties** panel under **Paragraph**.
2. Make sure you have the **Character Styles** panel selected in the **Properties** panel. It is located next to the **Paragraph Styles** panel.

USE THE BLUE COLOR  
AS IN THE  
ILLUSTRATION?



**You will now change the font size of the "Heading" text.**

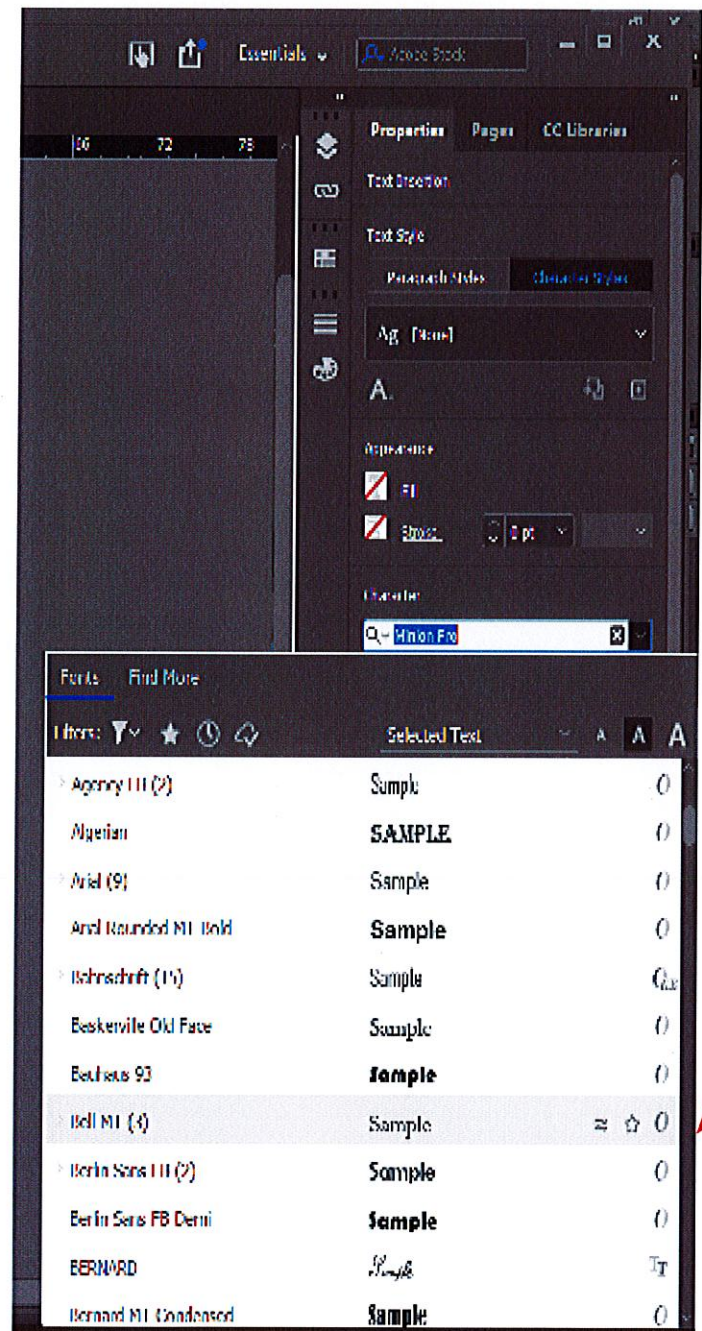
1. Highlight "Heading." Next, look at the **Character** section in the **Properties** panel. The **Character** section is the second section, underneath the **Appearance** section.
2. You will see an icon that looks like a little T and a big T. This is the icon for font size. Use the drop-down arrow to change the font size to 36pt.



Good, But  
Could you  
use the  
icon  
itself?

**Next, you will change the font style.**

1. While the text is highlighted, click the drop-down arrow of the first **Character** search bar. This is the font search bar. The default font style is **Minion Pro**.
2. After clicking on the drop-down arrow, move down the scroll bar until you find **Bell MT**. Select it.

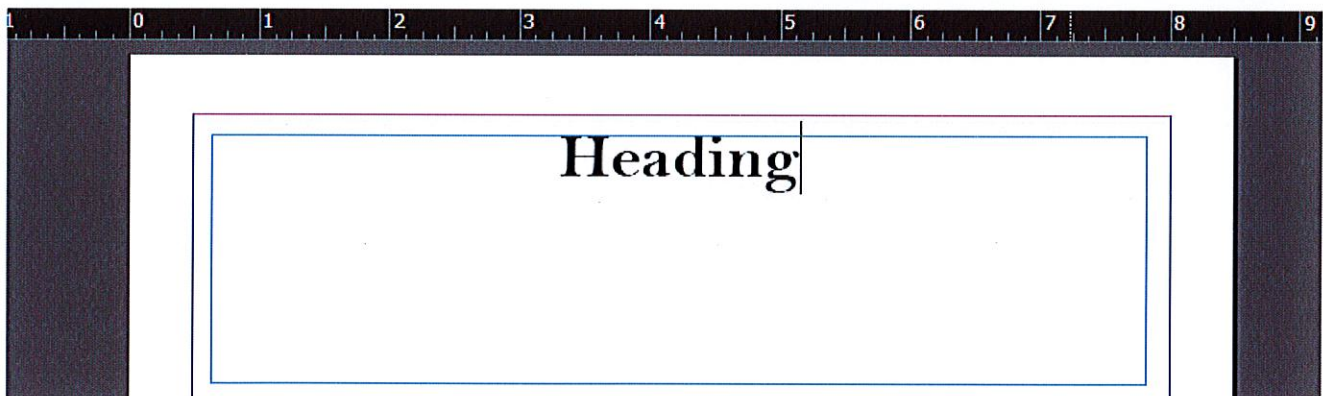
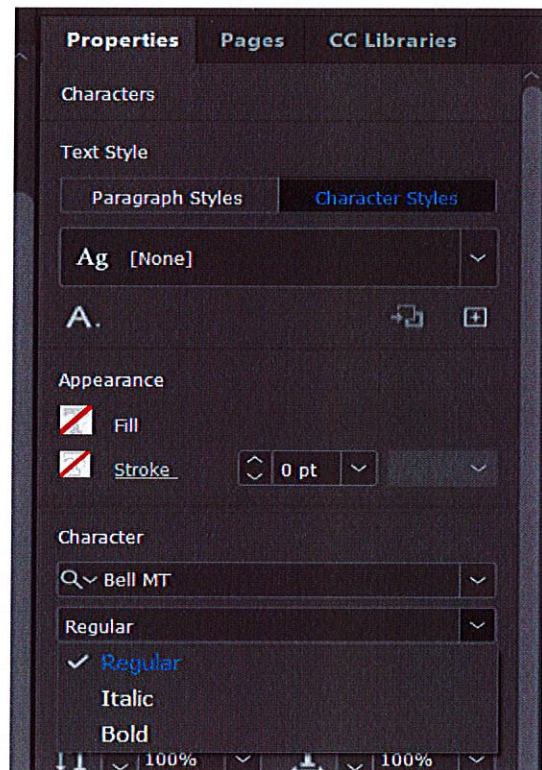


*THIS SCREEN CAPTURE  
IS NOT OF THE SAME  
QUALITY AS THE  
PREVIOUS ONES*



**Now that you have changed the font style, you will now change the font to Bold/Italic.**

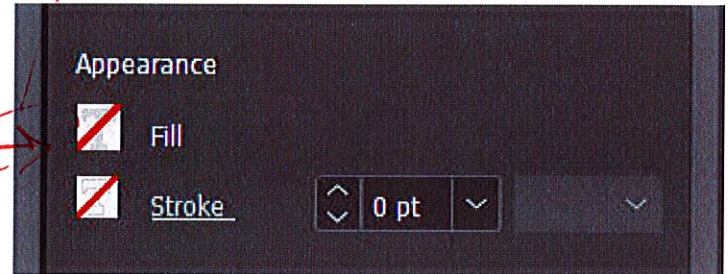
1. Underneath the first search bar, another search bar reads **Regular**. Click on the down arrow and choose **Italic**, **Bold**, or **Bold Italic**. In the example below, **Bold** was selected for the **Bell MT** font.



**The text is in a new font style and in bold.**

**The final step of this task will be to change the color. Remember to keep the text highlighted.**

1. Look at the **Appearance** section (above the **Character** section), which is where you can change the font color. Notice two white squares that have a red line running diagonally through each one. One will be titled **Fill** and one will be titled **Stroke**. In order to add color to the text, use the **Fill** option. Click on the square next to **Fill**.



2. A smaller window appears that shows a variety of colors to choose from to apply to the text. For this practice, select the red that has the **C=15 M=100 Y=100...** properties. This will change the color of the text.





**Good work! You have now successfully changed the font size, style, bold/italic, and color. Now that the changes have been made, you can name your new typographic style.**

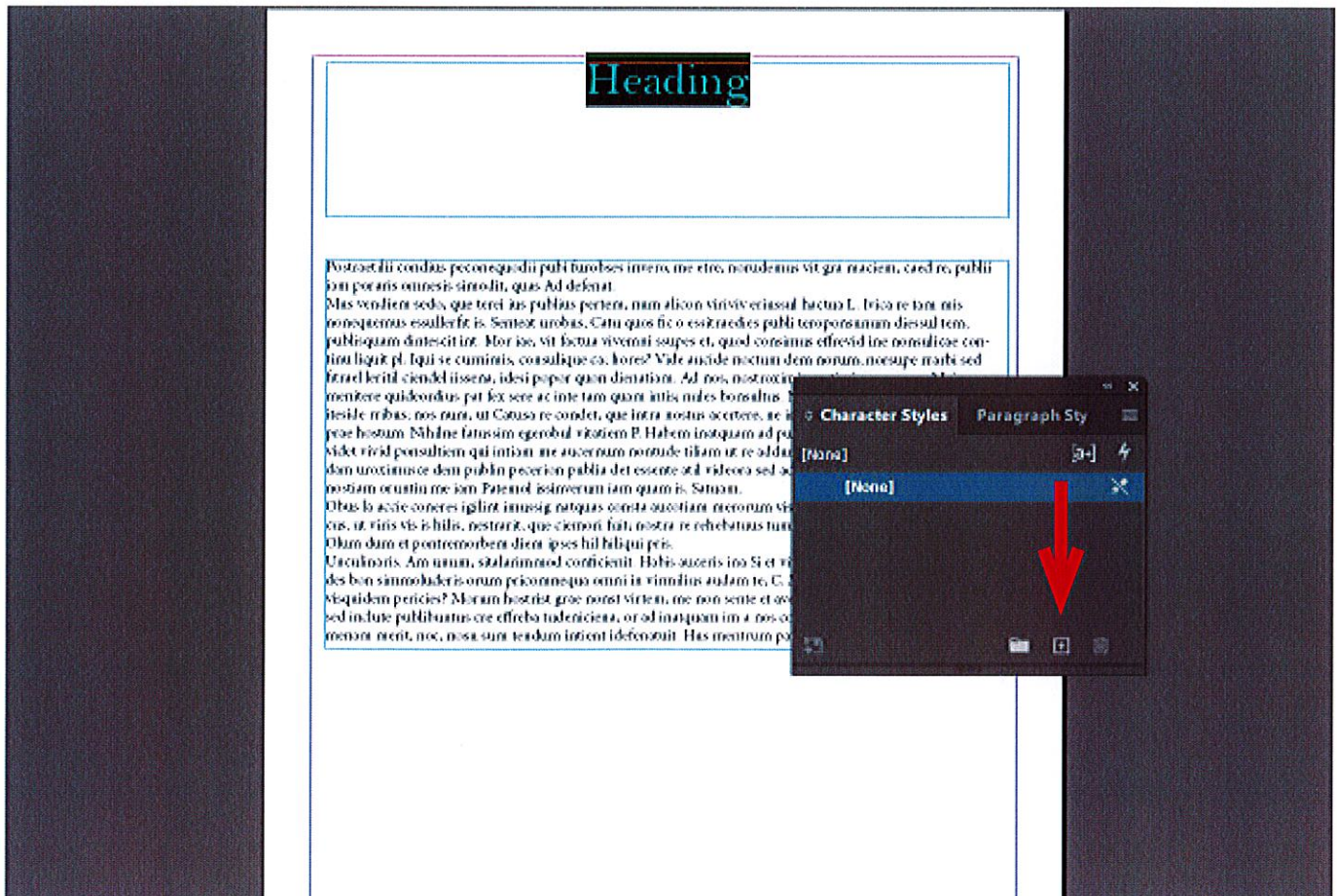


# Naming New Typographic Style...

EXPLAIN WHY - EASY TO CHANGE MANY INSTANCES WITH ONE DEFINITION

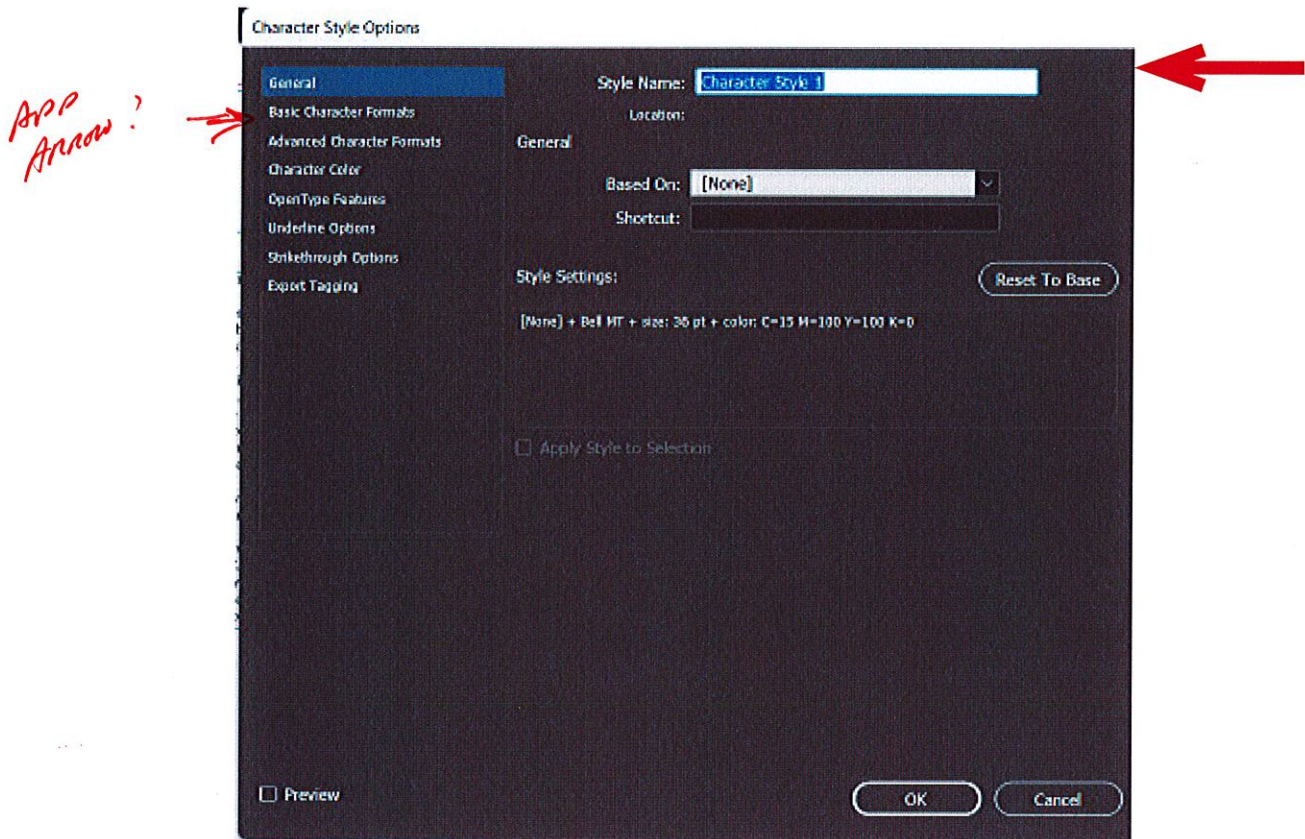
*Why create?* You now know how to change your font in various ways. The next step will be to name this new typographic style. Make sure that your "Heading" text is highlighted. You will also want to double check that you are still in the Character Styles tab in the Properties menu on the right. This is particularly important in naming your new style.

1. In the **Character Styles** panel, you will see an A. icon like this.  Click on the A. icon. A list of options will appear. Click on the first option named **Character Styles**.
2. A new, smaller window will appear. Look down at the bottom panel of this new window for a small icon that is a square with a plus sign.  This is the **Create New Styles** icon. Click on it.





3. A new name will show up in the list, **Character Style 1**. Double-click **Character Style 1** and a new window will open.
4. Replace the name **Character Style 1** with a new name for the typographic style.



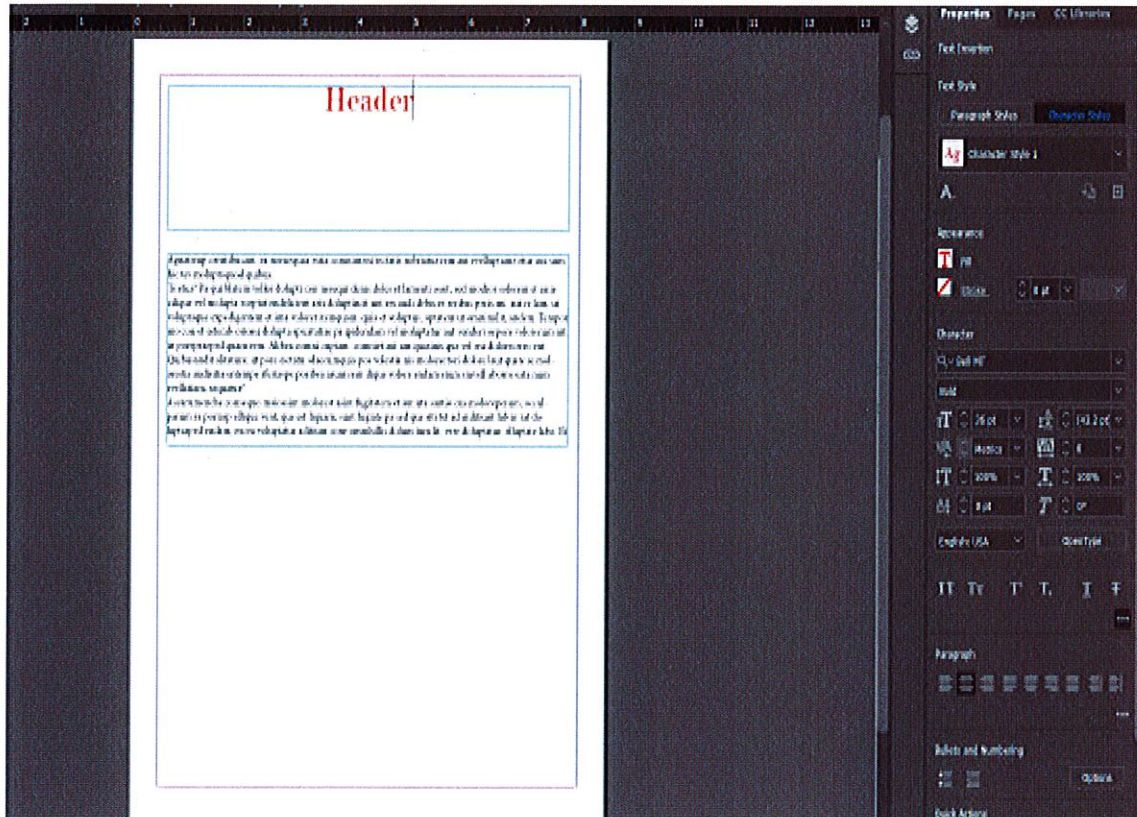
**WARNING: Before you rename, check that the properties you applied to the new font type have remained the same. Otherwise, all of your hard work won't be saved!**

5. In order to check this, look at the left panel and find the names **Basic Character Formats** and **Character Color**. Click on each option on the menu, starting with **Basic Character Formats**. Verify the selections for size, font style, and bold/italic.

6. If everything is correct, click **OK**. Then, rename the font type in the **Style Name** bar. In the example, the new style is named with the default **Character Styles 1**.

*FORMAT FOR THESE?*

7. Once you rename the new typographic style, click **OK** to save and then **close** the **Character Styles** panel. Notice that the new font type is visible in the **Properties** panel under the **Character Styles** panel.



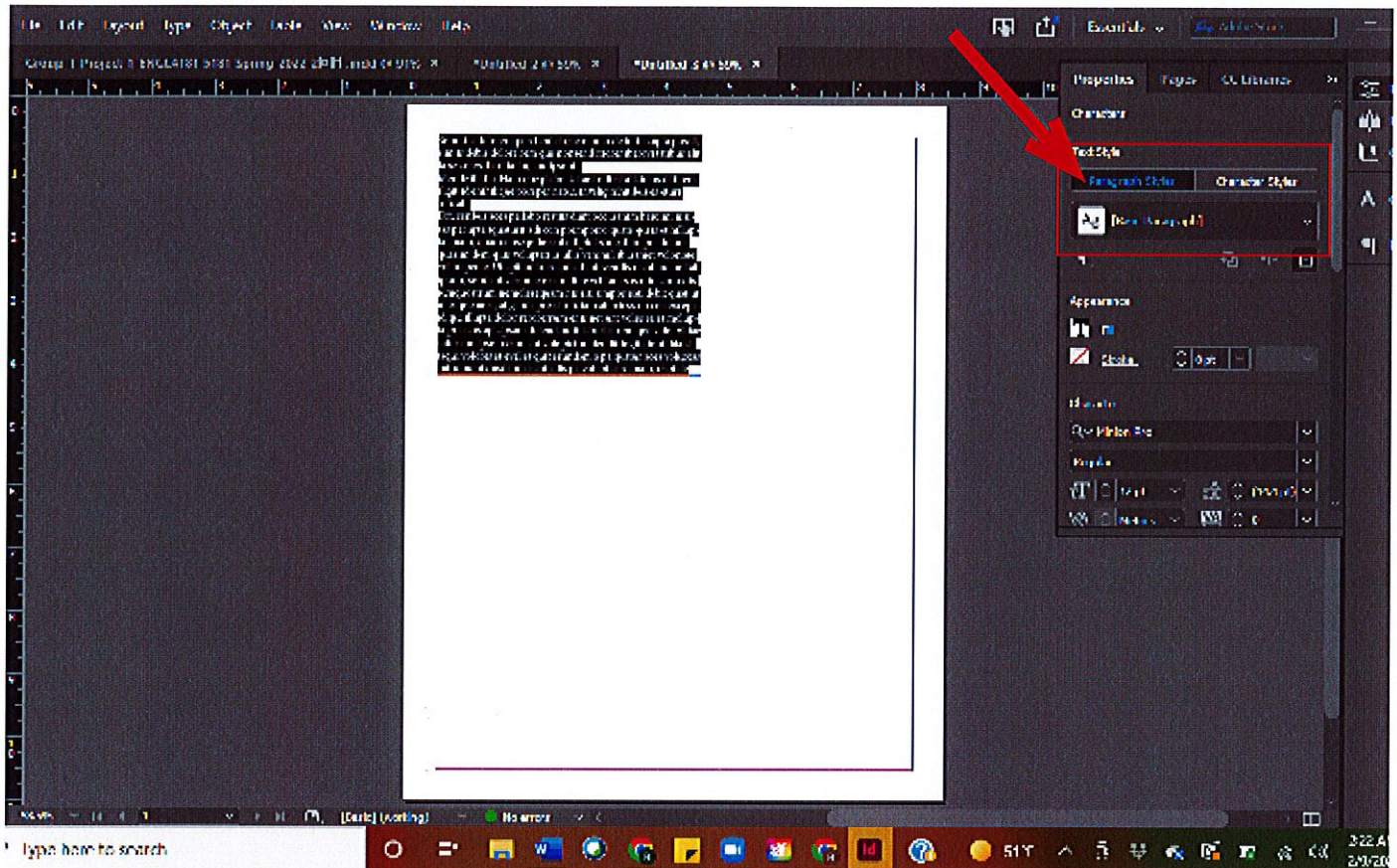
**Congratulations! You have now learned how to make a new typographic style and name it! Now you can move on to the next step!**



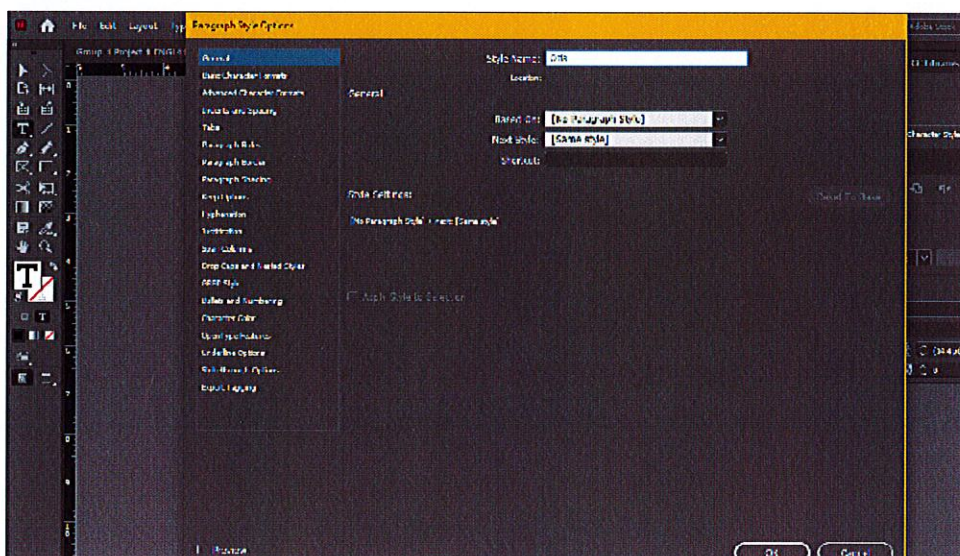
# Creating a Paragraph Style

OVERVIEW 1ST- WHY DO THIS

1. Select and highlight the text. Open the **Paragraph Styles** panel on the right side and select **New Paragraph Style**.



2. The **Paragraph Style** window will appear with a default name highlighted. Enter a new name. Click on **OK** at the bottom-right of the window.

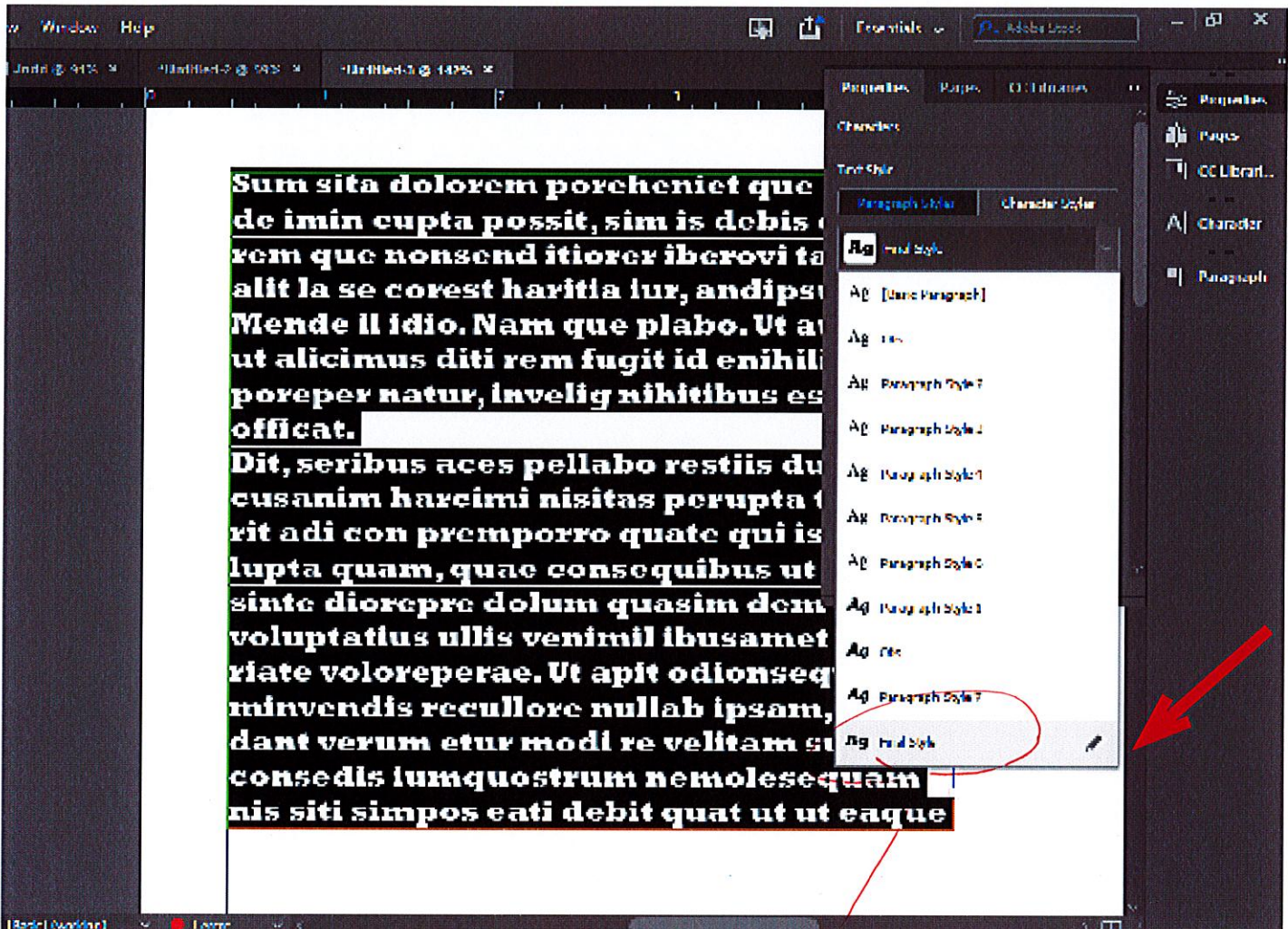


SCREEN  
CAPTURE  
QUALITY  
IS NOT THE  
SAME AS  
PREVIOUS  
IMAGES



# Applying a Paragraph Style

1. Apply the style to any paragraph. Highlight the text and then click on the name of the style you saved in the **Paragraph Styles** panel.



NOT LEGIBLE -  
BETTER SCREEN SHOT?

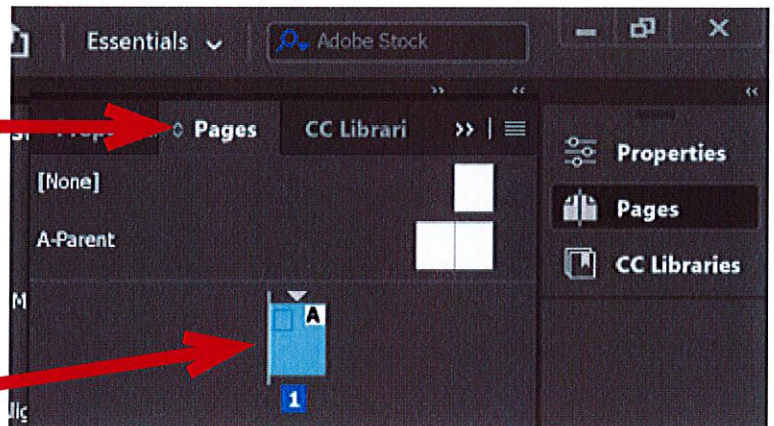


## Create a Parent Page...

*good purpose statement for this section - WHY ALL CENTERED?*

A **Parent (or Master) Page** is a nonprinting page that serves as a template that can be applied to some or all of the pages in your document. Parent pages contain text and graphic elements like page numbers, headers, footers, etc. that you want on all or most pages. You can have as many parent pages as you want in a document and apply them to individual or groups of pages.

- 1 On the upper right side of the InDesign document screen, click on the **Pages** panel. If the **Pages** panel is not showing, click on the **Window** drop-down menu and click on **Pages**.



- 2 Double-click on **A-Parent** in the **Pages** panel to display the Parent Page.

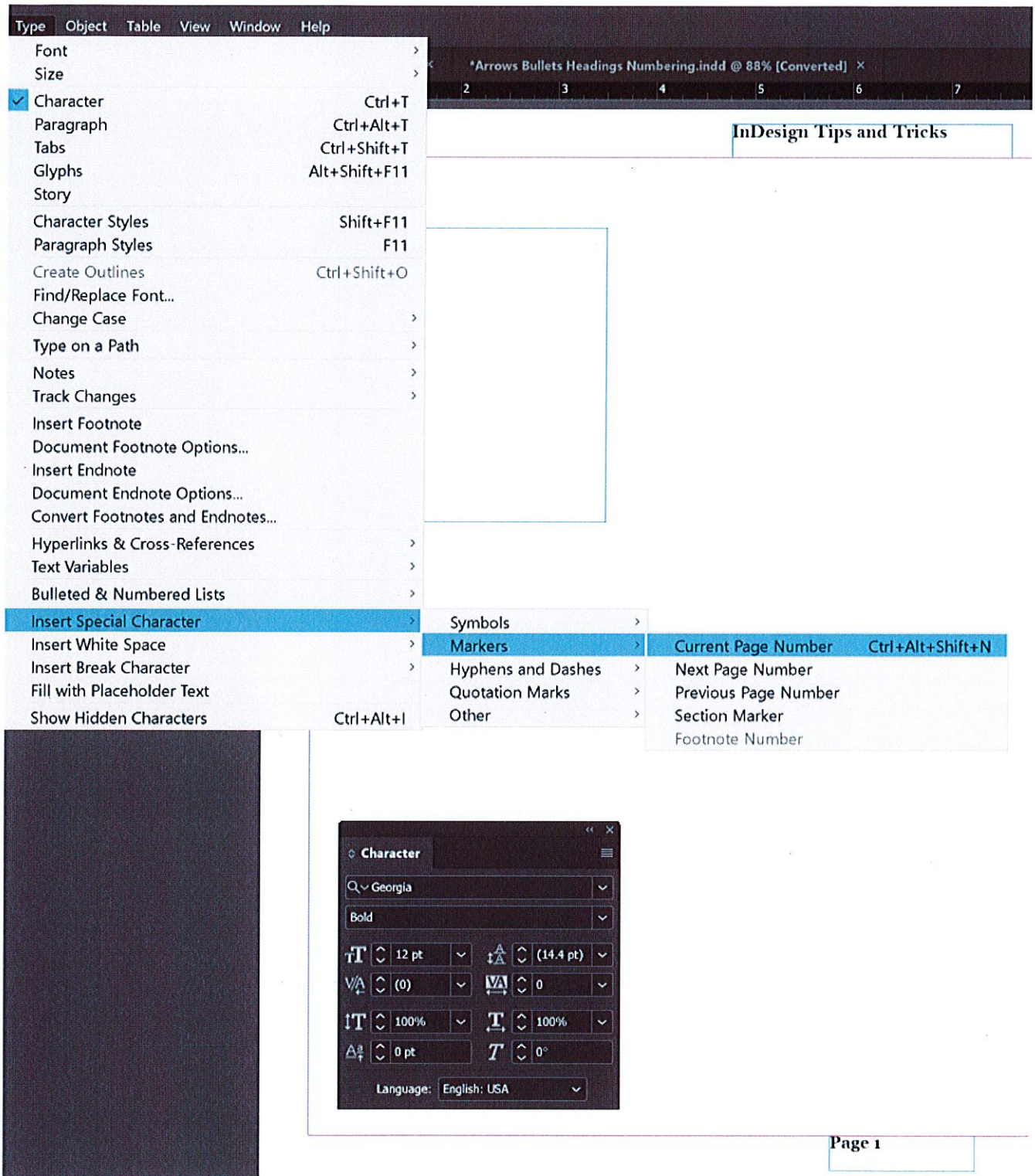
## Add Automatic Page Numbers...

- 1 With the **A-Parent** still highlighted, create a textbox large enough to hold the longest page number and any text you want to appear with it. Position the textbox where you want the page number to appear, normally in the lower-right margin of the document.



- 2 In the page number textbox, add any text that will come before or after the page number (such as "Page ") and format it using the **Paragraph Style** set up previously.
- 3 Position the insertion point the page number should appear, and from the **Type** drop-down menu select **Insert Special Character > Markers > Current Page Number**. See image below.



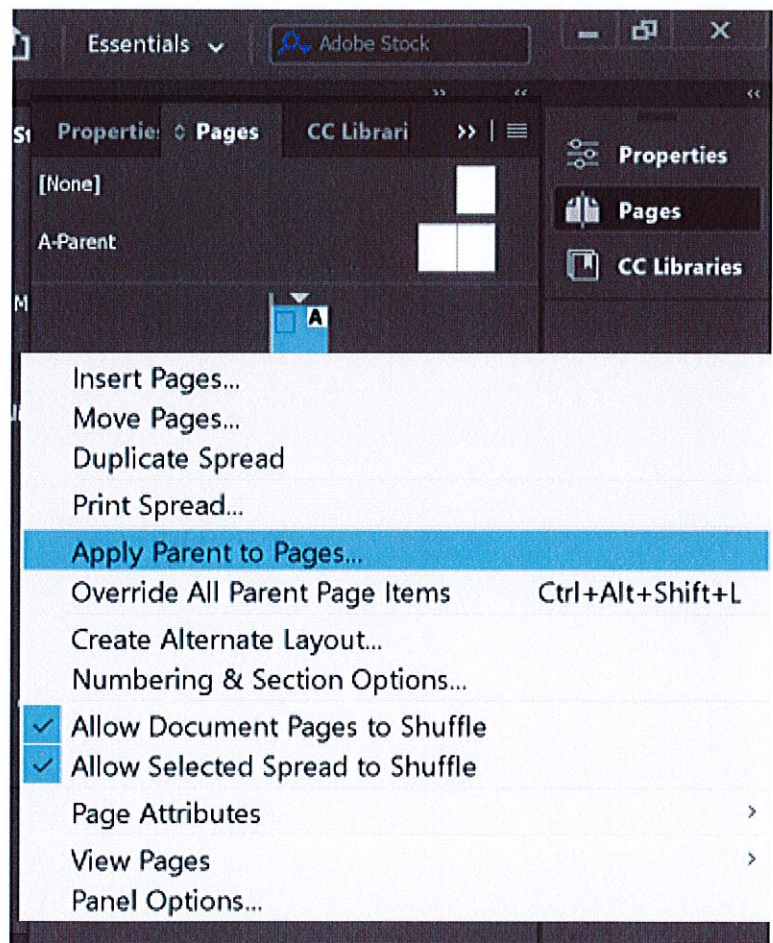


## Add a Running Head...

- 1 With the **A-Parent** still highlighted, create a textbox large enough to hold all the text of the running head in the desired location, usually above the frame of the document in the margin and aligned right.
- 2 Type the text to appear at the top of every page. Format it using the **Paragraph Style** set up previously.

## Apply the Parent to your Pages...

- 1 Right-click on a page to which you want to apply the **Parent Page** in the **Pages** panel.
- 2 Select **Apply Parent to Pages**. Apply the Parent Page to any or all pages.



**Congratulations! You have now learned how to add page numbers, a running head, and a parent to your InDesign document!**



# Conclusion...

In this tutorial for novice technical writing students, you learned how to perform the following tasks in Adobe™ InDesign® 2022 on a Windows PC or laptop device:

- 1) set up, name, and save an InDesign document;
- 2) create textboxes and fill them with placeholder text;
- 3) create a heading style in a specific typographic style;
- 4) apply the new heading style to headings in the document;
- 5) create a paragraph style;
- 6) apply the paragraph style to the text in a textbox; and
- 7) use the parent page function to apply page numbers and a running header.

If you need additional information on how to use InDesign, visit the [Adobe InDesign User Guide](#), which is continuously updated. If you cannot figure out how to perform a specific task, search on Google or another search engine to find a variety of videos.

omit?

**You have successfully completed this tutorial!**