

4-19-2019

# Notes on Scholarly Journal Typesetting using Adobe InDesign

Paul Royster

*University of Nebraska-Lincoln*, [proyster@unl.edu](mailto:proyster@unl.edu)

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# Notes on Scholarly Journal Typesetting using Adobe InDesign

Paul Royster

April 18, 2019

1. We use MS Word to do the editing and basic formatting.  
Italics, bold, and basic fonts are easier to change in Word than in InDesign.
2. The Word file should be single spaced, hyphenation turned off. Justify if you like, although that is equally easy in InDesign.
3. Copy the text and insert it into the double-column text frame of the InDesign template.  
Save-As the template under a new name so that you don't overwrite it later.
4. Select all the text (Ctrl-A), and then in the Paragraph menu select **Hyphenation**, and click  to hyphenate all.  
Turn off  Hyphenate last word, and  Hyphenate across columns.  
Move the slider to select More hyphens/better spacing. (All the way over!)  
Define how many letters to allow before/after hyphenation. (I do 2 before, 3 after)  
Define how many hyphenated lines in a row to allow. (I allow 3 but try to avoid that many)  
If you justify, you have to hyphenate. For unjustified text, it is less necessary.  
I do not justify or hyphenate bibliographies, especially those with doi's and URLs. (Just select the text and turn off the hyphenate.) Do not hyphenate titles or headings.  
Anymore I do not hyphenate abstracts either (though I do justify).
5. With all text still selected, from the Paragraph menu select **Justification**.  
(You can leave this as it is, but the typesetting will look better if you adjust the default values.)  
Space between words: 95% / 100% / 105%  
Spacing of letters: -2% / 0% / 2%  
"Glyph scaling" (flexing width of letters themselves): 98% / 100% / 102%

Auto leading: I believe the default is 120%. Most designers desire more, like 130% (so 10/13). I set it to 133%, for a 4/3 ratio. This is just the automatic leading applied if you do not stipulate something else.

6. At the lower right corner of the text frame on the first page, you should see a red cross. This indicates there is more text "up the spout." Click on the red cross with the arrow key and a tiny page icon with the beginning text will appear. Go to the next page, hold Shift and click in that text frame. InDesign will automatically add enough pages to accommodate the text. If you eventually need more or fewer pages, add or delete with the Page Layout menu. Connect them to the thread as above.

These templates are for 8.5x11 2-column layouts, but the initial headings, abstract, etc., are in a single column box at the top. Select, cut, and paste those from the 2-column into the 1-column upper box. Adjust boxes as needed with the arrow key.

There are books and online help for InDesign, so I won't try to teach how to use it, just how to apply it to this sort of type and page production. We are doing a very plain and classic academic-style journal. General tips:

- Put tables in a frame of their own. (Cut & paste them from the main file). They are easier to adapt and move around, set tabs, etc.
- Put figures at the top or the bottom of pages, but rarely in the middle. Put captions in a separate text frame, not part of the main text stream.
- Manually adjust or flex type spacing to avoid widows and orphans. A widow is a line alone on a page; and orphan is a word alone on a line—but the terms are used interchangeably. At least 2 lines of a paragraph should appear together. A paragraph's last line ought to have at least 2 words.
- You can flex the typesetting with the Type tool in the Control window using the double headed arrow box. This adds or subtracts microspacing of the letters and is useful if you need to add or lose a line from a paragraph. It goes up and down in increments of 10 units; I try not to do more than that, but sometimes circumstances call for +/-20. Above that, it begins to become noticeable.
- "Ragging" the bottoms (allowing them to run 1 or 2 lines long or short) is an acceptable practice, but not if you have running feet instead of or in addition to heads.
- "Hang" the entries in the bibliography by indenting all 1 pica and out-denting the first line -1 pica. I sometimes put extra space between entries to improve legibility or presentation.

- The 2-column journal styles generally place notes at the end rather than the foot of the page. If you do have notes:
  - Disable or circumvent Word's automatic numbering systems, or convert numbers to type with something like NoteStripper®.
  - Set footnotes in their own separate text frame; these can be strung together across pages if required. Hang or indent each note; small space between can help presentation.
- Balance columns, i.e., make them the same vertical length. You can usually shorten the frame by pulling up the bottom edge like a windowshade.
- The Enter key on the numeric keypad will jump the text string to the next column, as opposed to the Enter key on the regular keyboard, which is just a new paragraph return.
- The Master Pages hold the pagination (folios), running heads, or running feet.
- The Find Font function under Type menu will allow you to hunt out and change any stray letters or spaces that are not the proper font. It's worth running, if only to see what you have got.
- For fonts, I have become partial to the Sitka family, designed recently by Matthew Carter especially for onscreen display. It is a serif font, and comes in 5 or 6 weights depending on the ultimate size. I generally use the Sitka Subheading weight throughout, though sometimes the Display or Banner weight for the biggest headline or title. The smaller sized weights are cruder or heavier; the higher weights are sharper and more refined.
- For sans serif typeface, like the *Manter* template, I usually use Segoe UI, designed to be readable at all sizes. It has a semi-bold set as well as regular, bold, italic, bold italic, and super-heavy black. It (and the Sitka) are also very complete font sets—they have almost everything you may encounter—accented letters, math symbols, most dingbats. Segoe also has an extra Segoe Symbol font if necessary.
- For gosh sake, use a font that has all the types you need; don't be cabbaging together letters + accents or going to a pi-font for normal symbols like = or ~ or +. (*Looking at you, British typesetters.*)
- In addition to Sitka and Segoe, the following Windows fonts have full character sets (including Greek): Century Schoolbook, Georgia, New Times Roman, Book Antiqua, Palatino Linotype, Lucida Sans Unicode, Verdana, Calibri, Arial, and DejaVu (though the last 2 are in my view not as beautiful as some others).

- For 2-column layouts, type that is 9 or 10 point size, depending on the font, will work best. Don't be like Elsevier and set main body text in 8 point and captions, tables, and references in 6.5. You are not saving paper (it's digital, right?), and there is no danger of running out of electrons.
- If you do 1-column pages, then larger type is in order. Lately, I have been setting 11.5 or 12 point type on a 30 pica (5-inch) measure on single-column 8.5x11 pages.
- Try to avoid overly long lines in single-column settings; 65 to 75 characters is a good compromise. Longer lines become harder to read in a single sweep, and one loses the place more easily.
- Justified type blocks are easier to read. The regular line length makes for easier vertical movement of the eyes. For things like lists and bibliographies that are not to be read sequentially, this is less important.
- The 2-column style is dominant in scientific publications and most journals. It is not especially easy to read onscreen, as one often needs to keep changing the window or magnification. But it looks like the legacy journals, and for now that bespeaks authority and confidence.
- It is proper in book design to have larger outside and bottom margins than top and inside margins. This may be a holdover from the days of binding, but it still serves to provide more sense of flow and direction than centering everything on the page. In a 2-column narrow-margin layout, this may be less impactful.
- As an admittedly lazy person, I now use a full line space for vertical blank spacing; it just makes it easier to balance columns.
- Avoid if possible the plague of changing type sizes with the body of the work. Some journals reduce the size of type in the Materials and Methods section, or in block-quoted passages. That just makes it harder for everyone with no good reason anymore.
- Captions, however, should be differentiated from the body text, usually by size, sometimes by italics. References and other non-main-body type can be 1 or 2 points smaller.
- Many traditional typefaces used for offset printing do not translate well to the onscreen environment. They are too light and wispy; relying on the swelling and spreading effects of liquid ink on the plates, blanket, and paper to achieve desired weights or "color". Garamond or Caslon, for example, look terrific and classic on an uncoated paper, but spindly and weak on screen. Try different

typefaces; and output them to pdf to really see the final results, since InDesign's onscreen display is only approximate.

- I try to avoid getting too cute with interpolated type sizes (like 9.33 or 10.4, for example). For a specific one-off example, I could see it; but past composers lived with 9 or 10 or 11, so surely we can too. I do sometimes go halfway (like 9.5), but I cross my fingers and say a prayer when I do.
- Don't cram. It's not appropriate or worth it anymore. We are not printing or mailing, so the number of pages is not a factor. Be generous; be readable.
- Be sparing in the use of hairlines. Too many is a bad look. Thickness of .5 or .75 point is usually appropriate. Boxes also should be used with restraint.
- I try to avoid ALL CAPITALS except for running heads. When you do use them, you must space them out, like so: ALL CAPITALS Use the spacing controls, don't add word spaces. (But never letter-space lower case letters; it is a sin.)
- Too many font changes and too many size changes can make your page look like a pasted up ransom note. Keep it plain and simple, if you can.
- If everything is italicized (or boldface), then nothing is emphasized. Whole paragraphs should not be treated that way. Emphasis requires contrast.
- Images should be sized in Photoshop or other image software to be within 10% of their final size at resolutions of 300 ppi for color or grayscale; bitmap (black/white) images should be at 600 ppi, if possible. InDesign is for layout, not for image manipulation.
- Finally, type is black. Gray and colors may be used for decoration or special design features, but setting a whole text in other-than-black is a disservice to readers. Think, too, of the person who may want to print or photocopy your page.

"Composition" (typesetting + page layout) is a skill that is worth a life of study and practice. If you are getting to make books and journals and pages to be read, that is a privilege, an honor, and a responsibility to the author and the reader. Be observant, keep an open mind, find out what works for your situation.

I am attaching some InDesign templates, the file suffixes are .indd. These are created in the older Adobe CS (=Creative Suite; i.e. disk) version, but should also work properly in the newer cloud-based software.

Manter is a scientific journal in 2-column sans-serif (Segoe) format. For a sample in use, see <http://digitalcommons.unl.edu/manter/9> (and learn about Andean frog chiggers).

TNAS is another science journal. It is based on reproducing a legacy print design using Book Antiqua and Arial. I would normally not go this small or use running heads AND feet, but we were matching their former look and style. A sample of this template in use is here: <http://digitalcommons.unl.edu/tnas/520>

MS Template02 is for 1-column 8.5 x 11 pages. It has a small frame at the foot of page 1 for the publisher/copyright/citation information. We use this as a standardized format for author manuscripts in the IR. A sample of this being used is here: <https://digitalcommons.unl.edu/famconfacpub/218>

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**Paul Royster** is Coordinator for Scholarly Communications at the University of Nebraska–Lincoln Libraries. He was previously design & production manager for Yale University Press and The Library of America.

(This document was prepared in MS Word. Sorry.)