How to Create and Use Document Templates in Adobe InDesign CS6

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Introduction

You will create many different types of documents as a technical communicator. You may create a brochure, flyer, poster, or booklet at some point or another. The creation of these documents often involves using a template. A template is an already formatted blank document in which you insert text and graphics. Using templates is extremely beneficial. A single template can create numerous documents. Templates save you time and ensure consistency.

This manual contains the instructions for creating several templates that technical communicators often use. This includes a brochure, flyer, poster, and booklet. Instructions for saving your finished document as a PDF are included as well instructions for printing from Adobe Acrobat X Pro. All templates will be created using Adobe InDesign CS6.
Brochure

A brochure is a leaflet that provides information on a product, service, or company. They are persuasive in nature as they are meant to convince the reader to choose that product, service, or company. Brochures are typically printed double-sided on high-quality paper and in color. Brochures are generally distributed by mail, brochure rack, or hand.

Brochures are usually either bi-fold or tri-fold. The following instructions are for creating a tri-fold brochure. This brochure template will be two letter size pages with three columns each. The first page contains the inside flap, outside back, and the cover. The second page contains the three inside columns, which are generally used for the main content of the brochure. Brochures are printed double-sided so that the first page is the face of the printed page and the second page is the back of the printed page, making it one printed page.

Examples of Brochures

Example of a tri-fold brochure

Another example of a tri-fold brochure

Template page 1

Template page 2
Creating a Brochure Template

**Step 1:** Open Adobe InDesign CS6.
**Step 2:** Go To File –> Document Presets –> and click Define. The Document Presets dialogue box will appear.
**Step 3:** Click New.
**Step 4:** Under Document Preset, change “Document Preset 1” to “Brochure.”
**Step 5:** Change Number of Pages to 2.
**Step 6:** Ensure that Page Size is set to Letter.
**Step 7:** Change Orientation to Landscape.
**Step 8:** Under Columns, increase Number to 3.
**Step 9:** Under Margins, decrease all margins to 0.25 in.
**Step 10:** Leave all other settings the same and press OK. InDesign will return you to the Document Presets dialogue box.
**Step 11:** In the Document Presets dialogue box, click OK.

How your dialogue box should look with changes made
Printing Your Brochure

Saving Your Brochure as a PDF

**Step 1:** Open your brochure in Adobe InDesign CS6.

**Step 2:** Ensure that your brochure is complete and contains no mistakes or typos.

**Step 3:** Go to File -> Adobe PDF Presets -> High Quality Print. A dialogue box will appear.

**Step 4:** Locate a folder or location to save your document.

**Step 5:** Click save. The Export Adobe PDF dialogue box will appear.

**Step 6:** In General, uncheck Optimize for Fast Web View.

**Step 7:** In Compression, change all instances of “Bicubic Downsampling to” to “Do Not Downsample.”

**Step 8:** Click Export.
How to Create and Use Document Templates in Adobe InDesign CS6

Printing Your Brochure from Adobe Acrobat X Pro

**Step 1:** Open the PDF you just created in Adobe Acrobat X Pro.
**Step 2:** Go to File --> Print. The Print dialogue box will appear.
**Step 3:** Under Printer, select whichever printer you want to print from.
**Step 4:** Ensure that Pages to Print is set to All.
**Step 5:** Ensure that Page Sizing & Handling is set to Size.
**Step 6:** Check Print on Both Sides of Paper.
**Step 7:** Select Flip on Short Edge.
**Step 8:** Change Orientation to Landscape
**Step 9:** Click Print

![How your Print dialogue box should look with changes made](image-url)
Flyer

A flyer is a leaflet that provides information on a product, service, or event. They are generally used for mass marketing or communication. Flyers are both usually eye-catching and informative. Flyers are generally distributed by hand or bulletin board.

Flyers can either be single-sided or double-sided. The following instructions are for creating a double-sided flyer. The flyer template will be two letter size pages. The first page of a flyer usually contains eye-catching graphics and slogans while the second page contains the main content. Flyers are printed double-sided so that the first page is the face of the printed page and the second page is the back of printed page.

Examples of Flyers
Creating a Flyer Template

**Step 1:** Open Adobe InDesign CS6.
**Step 2:** Go To File -> Document Presets -> and click Define. The Document Presets dialogue box will appear.
**Step 3:** Click New.
**Step 4:** Under Document Preset, change “Document Preset 1” to “Flyer.”
**Step 5:** Change Number of Pages to 2.
**Step 6:** Ensure that Page Size is set to Letter.
**Step 7:** Ensure that Orientation is set to Portrait.
**Step 8:** Under Margins, change all margins to 0.5 in.
**Step 9:** Leave all other settings the same and press OK. InDesign will return you to the Document Presets dialogue box.
**Step 10:** In the Document Presets dialogue box, click OK.

How your dialogue box should look with changes made
Printing Your Flyer

Saving Your Flyer as a PDF

**Step 1:** Open your flyer in Adobe InDesign CS6.
**Step 2:** Ensure that your flyer is complete and contains no mistakes or typos.
**Step 3:** Go to File –> Adobe PDF Presets –> High Quality Print. A dialogue box will appear.
**Step 4:** Locate a folder or location to save your document.
**Step 5:** Click save. The Export Adobe PDF dialogue box will appear.
**Step 6:** In General, uncheck Optimize for Fast Web View.
**Step 7:** In Compression, change all instances of “Bicubic Downsampling to” to “Do Not Downsample.”
**Step 8:** Click Export.
Printing Your Flyer from Adobe Acrobat X Pro

Step 1: Open the PDF you just created in Adobe Acrobat X Pro.
Step 2: Go to File –> Print. The Print dialogue box will appear.
Step 3: Under Printer, select whichever printer you want to print from.
Step 4: Ensure that Pages to Print is set to All.
Step 5: Ensure that Page Sizing & Handling is set to Size.
Step 6: Check Print on Both Sides of Paper.
Step 7: Select Flip on Long Edge.
Step 8: Change Orientation to Portrait.
Step 9: Click Print.

How your dialogue box should look with changes made:
Poster

A poster is a document that provides information on an event or group. Usually they advertise set events and include a time, date, and place along with a brief description of the event. The most recognizable type of poster is a movie poster. Posters are meant to be both eye-catching and informative. Posters are displayed on vertical surfaces such as walls.

Posters are one-sided. Posters are generally large. The following instructions are for creating a 12 in by 18 in poster.

Examples of Posters
Creating a Poster Template

Step 1: Open Adobe InDesign CS6.
Step 3: Click New.
Step 4: Under Document Preset, change “Document Preset 1” to “Poster.”
Step 5: Under Page Size, increase Width to 12 in and Height to 18 in.
Step 6: Ensure that Orientation is set to Portrait.
Step 7: Under Margins, decrease all margins to 0 in.
Step 8: Leave all other settings the same and press OK. InDesign will return you to the Document Presets dialogue box.
Step 9: In the Document Presets dialogue box, click OK.

How your dialogue box should look with changes made
Printing Your Poster

Saving Your Poster as a PDF

**Step 1:** Open your poster in Adobe InDesign CS6.
**Step 2:** Ensure that your poster is complete and contains no mistakes or typos.
**Step 3:** Go to File -> Adobe PDF Presets -> High Quality Print. A dialogue box will appear.
**Step 4:** Locate a folder or location to save your document.
**Step 5:** Click save. The Export Adobe PDF dialogue box will appear.
**Step 6:** In General, uncheck Optimize for Fast Web View.
**Step 7:** In Compression, change all instances of “Bicubic Downsampling to” to “Do Not Downsample.”
**Step 8:** Click Export.

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*Optimize for Fast Web View in General*

- Pages
- Spreads

*Options*

- Embed Page Thumbnails
- View PDF after Exporting
- Optimize for Fast Web View
- Create Acrobat Layers

*Create Tagged PDF*

Export Layers: Visible & Printable Layers

*Do Not Downsample in Compression*

- Color Images
  - Compression: Automatic (JPEG)
  - Image Quality: Maximum
  - For images above: 450 pixels per inch
  - Tile Size: 128
  - Do Not Downsample

- Grayscale Images
  - Compression: Automatic (JPEG)
  - Image Quality: Maximum
  - For images above: 450 pixels per inch
  - Tile Size: 128
  - Do Not Downsample

- Monochrome Images
  - Compression: CCITT Group 4
  - For images above: 1800 pixels per inch
Printing Your Poster from Adobe Acrobat X Pro

*Step 1:* Open the PDF you just created in Adobe Acrobat X Pro.
*Step 2:* Go to File -> Print. The Print dialogue box will appear.
*Step 3:* Under Printer, select whichever printer you want to print from.
*Step 4:* Ensure that Page Sizing & Handling is set to Size.
*Step 5:* Change Orientation to Portrait.
*Step 6:* Click Page Setup in the bottom lefthand corner. The Page Setup dialogue box will appear.
*Step 7:* Under Paper, change Size to 12x18.
*Step 8:* Click OK. The Page Setup dialogue box will close.
*Step 9:* Click Print.
Booklet

Booklets are small, informative documents that have multiple pages. Booklets are a lot like books and manuals but they are smaller and generally less formal. They often provide information on events and organizations but are able to go more in-depth because of their length.

Booklets are created by printing two pages onto a single sheet of paper. Booklets are printed so that they only need to be folded in half and stapled or stitched to be completed. The following instructions are for creating a booklet using standard letter paper.

Examples of Booklets
Creating a Booklet Template

*Step 1:* Open Adobe InDesign CS6.
*Step 3:* Click New.
*Step 4:* Under Document Preset, change “Document Preset 1” to “Booklet.”
*Step 5:* Change Number of Pages to 4.
*Step 7:* Ensure that Orientation is set to Landscape.
*Step 8:* Under Margins, change all margins to 0.25 in.
*Step 9:* Leave all other settings the same and press OK. InDesign will return you to the Document Presets dialogue box.
*Step 10:* In the Document Presets dialogue box, click OK.

How your dialogue box should look with changes made
Printing Your Booklet

Saving Your Booklet as a PDF

**Step 1:** Open your Booklet in Adobe InDesign CS6.
**Step 2:** Ensure that your booklet is complete and contains no mistakes or typos.
**Step 3:** Go to File –> Adobe PDF Presets –> High Quality Print. A dialogue box will appear.
**Step 4:** Locate a folder or location to save your document.
**Step 5:** Click save. The Export Adobe PDF dialogue box will appear.
**Step 6:** In General, uncheck Optimize for Fast Web View.
**Step 7:** In Compression, change all instances of “Bicubic Downsampling to” to “Do Not Downsample.”
**Step 8:** Click Export.

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Optimize for Fast Web View in General

**Options**
- Embed Page Thumbnails
- View PDF after Exporting
- Optimize for Fast Web View
- Create Acrobat Layers
- Create Tagged PDF

Export Layers: Visible & Printable Layers

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Do Not Downsample in Compression

**Color Images**
- Do Not Downsample

**Grayscale Images**
- Do Not Downsample

**Monochrome Images**
- Do Not Downsample

Compression: CCITT Group 4
Printing Your Booklet from Adobe Acrobat X Pro

**Step 1:** Open the PDF you just created in Adobe Acrobat X Pro.

**Step 2:** Go to File –> Print. The Print dialogue box will appear.

**Step 3:** Under Printer, select whichever printer you want to print from.

**Step 4:** Ensure that Pages to Print is set to All.

**Step 5:** Under Page Sizing & Handling, select Booklet.

**Step 6:** Ensure that Booklet Subset is set to Both Sides.

**Step 7:** Ensure that Binding is set to Left.

**Step 8:** Ensure that Orientation is set to Portrait.

**Step 9:** Click Print.
Creating a New Document Using Your Templates

*Step 1:* Open Adobe InDesign CS6.
*Step 2:* On the splash screen, select Document.
*Step 3:* Under Document Preset, select either Brochure, Flyer, Poster, or Booklet.
*Step 4:* Click OK. InDesign will open your template.

This is the splash screen.

Choose a document preset.
Conclusion

Templates are a fantastic tool for technical communicators. An organization may use templates to ensure consistency between documents. An individual technical communicator such as you may use templates to ensure that the same result is achieved each time.

With a basic understanding of the creation of templates you can now create templates for yourself that match your own unique needs.

Additional Resources

If you ever encountered any difficulty while working on your document, the following websites are a great resource. Coworkers and classmates are an exceptionally good resource as well. They are most likely to have encountered the same difficulties that you have.

http://helpx.adobe.com/indesign.html
http://tv.adobe.com/product/indesign/
www.lynda.com/InDesign
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P

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Poster  9
Poster Template  10