

# Editorial & Layout Design - Workbook

This workbook turns the Editorial & Layout Design course into a real, finished multi-page layout - a short magazine feature or report section built on a proper grid. Each section pairs with a course module and mixes guided exercises, fill-in worksheets, and checklists so you end up with an actual print-ready document with master pages, a style sheet, and a folded flat-plan - not just notes. Work through it with InDesign or Affinity Publisher open, a real text file to place, and a few images on hand. The value is in the document you build and the grid, styles, and specs you write down so it reads as one coherent publication.

## The Editorial Foundation: Documents and Grids

Set the page geometry and build the grid system every page in the document will live inside.

### Worksheet: Document Setup Spec

Define the physical canvas for your project before drawing anything. Pick a real publication type (a 8-page magazine feature, a report section, or a short booklet) and let it drive these choices. Confirm the trim and binding with a printer if you can.

Publication type and approximate page count

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Trim size (e.g. A4 210x297 / Letter 8.5x11 / 6x9 in)

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Facing pages enabled? (Y/N)

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Margins - top / bottom / inside / outside (note inside and bottom larger)

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Bleed on outer edges (e.g. 3 mm)

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Safety margin / live area to hold from trim (e.g. 3-5 mm)

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### Exercise: Build the Column and Baseline Grid

Decide your body leading first (for example 9/12 or 10/13), then set the baseline grid increment equal to it with a start position at the top margin. Set up your column count and gutter on the master page. Apply Align to Baseline Grid to a sample body paragraph and confirm lines lock to the grid across two columns.

- What body size and leading did you choose, and what is your baseline grid increment set to?
  - How many columns and what gutter width (e.g. 4-5 mm), and why does that suit your publication type?
  - With two columns of placed text, do the lines align line-for-line across the gutter when Align to Baseline Grid is on?
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## Exercise: Measure Your Line Length

Place a few paragraphs of real body text in one column at your chosen size and measure the characters per line. Aim for roughly 45-75 characters (about 66 ideal). Adjust the column width, type size, or column count until the measure lands in range, then re-check the leading still reads comfortably.

- How many characters per line does your current column produce?

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- What did you change (column width / type size / column count) to bring it into the 45-75 range?

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- At a longer measure, did you need to add leading to keep lines comfortable to track?

## Checklist: Foundation Setup Checklist

- Document created with Facing Pages and correct trim size
- Four margins set independently (inside and bottom more generous)
- Bleed of the required amount added on all outer edges
- Body leading chosen and baseline grid increment set to match it
- Column count and gutter defined on the master page
- Body sample aligns to the baseline grid across columns

## Master Pages and the Self-Building Document

Make the document build itself with master pages, automatic folios, running heads, and threaded text.

### Exercise: Set Up Your Master Pages

On the A-Master spread, place the column grid, margins, a running-head frame, and page-number markers on both the left and right pages. Duplicate it to make an opener master with no running head and a larger top margin for titles. Apply the masters to your document pages, then edit a master and confirm the change ripples to every page using it.

- Which masters did you build (e.g. A-Text, B-Opener, C-Full Image) and what differs between them?

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- Did inserting the Current Page Number marker show the master letter on the master and the real number on each page?

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- When you edited the A-Master, did every page based on it update automatically?

### Exercise: Place and Thread a Story

Use Place to import a real text file (a .docx or .txt of at least a few pages). Hold the autoflow modifier and click in the first column to flow the whole story through linked frames, adding pages as needed. Turn on Show Text Threads to see the links, and watch the out ports for any red overset plus signs.

- Did the story flow through linked frames automatically, adding pages, rather than as pasted islands?

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- Are there any red overset (plus sign) indicators, and where does the text need to flow onward?

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- After editing a sentence early in the story, did everything downstream reflow correctly on its own?

## Worksheet: Folio and Running-Head Plan

Plan the repeating page furniture before refining content. Follow recto/verso conventions and keep everything inside the safety margin.

Folio position (outside edge / centered foot) and style (font, size, color)

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Recto = odd numbers, verso = even numbers confirmed

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Running head content - left page (publication/chapter) vs right page (section/article)

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Front matter numbering (unnumbered / lowercase roman) and where arabic page 1 starts

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Drop folios on openers and full-bleed pages? (Y/N)

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Folio and running head kept inside the safety margin? (Y/N)

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### Checklist: Self-Building Document Checklist

- Column grid and margins placed on the master, not on individual pages
- Running-head frame and page-number markers on both left and right master pages
- Current Page Number marker used - no hand-typed folios anywhere
- Separate opener master applied to section/feature first pages
- Long copy placed via Place and threaded (autoflowed), not pasted
- Show Text Threads confirms a continuous, ordered flow with no stranded frames

## Typography and Hierarchy for Reading

Set readable body text, build a clear hierarchy, and lock every level into a reusable style sheet.

### Worksheet: Body Text Specification

Lock the three readability variables for your body text and the typefaces behind your system. Print a full page and read it at arm's length to judge real comfort, not screen size.

Text typeface (with true italic + bold), e.g. Garamond / Minion / Sabon

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Display typeface for headlines

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Body size (e.g. 9-11 pt magazine, 10-12 pt book)

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Leading (about 120-145 percent of size, e.g. 10/13)

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Measure - target 45-75 characters per line (note actual count)

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Alignment (justified with hyphenation / left-aligned ragged) and paragraph separation (1 em indent OR space-after, not both)

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### Exercise: Build the Hierarchy and Squint-Test It

Design each editorial text level with deliberate contrast: headline, deck/standfirst, subhead, body, pull quote, caption, byline/kicker. Use a modular scale (multiply sizes by about 1.25 or 1.5 per step). Then squint at a spread until detail blurs and check the reading order still reads as shapes.

- What size and weight is each level, and do the jumps between them feel like a deliberate scale rather than half-steps?
  - Squinting, does exactly one element clearly win as the entry point on the spread?
  - Are subheads unmistakably headings (by size, weight, and space) and captions unmistakably separate from body?
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## Exercise: Create and Cascade the Style Sheet

Format one perfect sample paragraph for each level, then create a named paragraph style from each. Set Based On so supporting styles inherit from a parent Body style, and set Next Style so Headline flows to Deck flows to Body as you type. Add character styles for inline emphasis (bold lead-in, drop cap). Then change the base font and confirm the whole document updates.

- List the paragraph styles you created - is every text level covered (body, headline, deck, subhead, caption, pull quote, folio)?

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- Did Based On and Next Style relationships make the hierarchy cascade and flow as you typed?

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- When you changed the parent Body style's size or font, did the entire document restyle consistently?

## Checklist: Typography and Styles Checklist

Body size, leading, and measure tuned and read-tested on paper

One text family + one display family, each with true italic and bold

Curly quotes, en/em dashes, and ligatures on; no straight quotes

Every text level has a named paragraph style - no local-only formatting

Styles use Based On and Next Style for cascading, automatic flow

Character styles used for inline emphasis instead of redefining paragraphs

## Visual Flow, Imagery, and Print-Ready Handoff

Compose spreads, pace the feature, preflight the file, and export a print-ready, correctly imposed PDF.

### Exercise: Flat-Plan and Pace the Feature

Before refining any single spread, sketch a thumbnail flat-plan of every spread in your feature. Plan a dramatic opener, then alternate denser text spreads with airier image-led ones, building to a close. Mark where the hero images land, where white space breathes, and where a pull quote adds a beat.

- Where does your opener create drama, and where does the feature breathe versus run dense?

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- Does the pacing alternate busy and calm spreads, or do several heavy spreads stack together?

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- Is the reader always led from a clear entry point on each spread toward the next?

### Exercise: Compose a Spread on the Grid

Working in spread view, balance the left and right pages as one picture. Snap image edges to the column and baseline grid, use one dominant hero image plus smaller supporting ones, and keep faces and critical detail out of the gutter. Decide where to go full-bleed (into the 3 mm bleed) versus gridded. Check effective image resolution after scaling.

- Does the composition balance across the full spread, or does one page feel lopsided?

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- Is anything important lost in the gutter/spine, and do full-bleed images extend into the bleed?

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- After scaling, is every placed image about 300 ppi effective resolution at its placed size?

### Worksheet: Preflight and Handoff Log

Record the technical checks and what you delivered so the handoff is reproducible. Confirm PDF settings and binding with your printer.

Document and images in CMYK (no stray RGB)? (Y/N)

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All images about 300 ppi effective at placed size; lowest effective ppi found

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Links panel: all links present, none missing/modified? (Y/N)

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Fonts active and packaged/outlined for handoff? (Y/N)

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Bleed (3 mm) present on edge content; no overset (red plus) anywhere? (Y/N)

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Deliverable: packaged native folder + PDF/X (X-1a or X-4), single pages in order, page count valid for binding (multiple of 4 for saddle stitch)

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### Checklist: Print-Ready Export Checklist

- Final preflight run with a print profile; every error resolved
- Package run - document, all links, and fonts collected into one folder
- Exported PDF/X (X-1a or X-4) with bleed and any marks the printer specified
- Exported as single pages in order (not reader's spreads) for imposition
- Page count works for the binding method (multiple of 4 for saddle stitch)
- Spec note sent: trim, bleed, page count, binding, CMYK, paper stock

### Your Action Plan

1. Choose a real publication type and set up the document with trim, facing pages, margins, and 3 mm bleed.
2. Decide body leading, then build the column grid and a matching baseline grid on the master page.
3. Build A-Text and B-Opener master pages with running heads and automatic page-number markers.
4. Place your story with Place and autoflow it through threaded frames across the document.
5. Tune body size, leading, and measure (45-75 characters) and read-test a printed page.
6. Design the hierarchy - headline, deck, subhead, body, pull quote, caption - on a modular scale.
7. Capture every level as a paragraph style with Based On and Next Style relationships, and apply styles to all text.
8. Flat-plan the feature for pacing, then compose each spread balanced across the gutter on the grid.
9. Run preflight: CMYK, 300 ppi links, active fonts, bleed, and no overset - resolve every flag.
10. Package the document and export a PDF/X with bleed as single pages, then deliver with a short spec note.









