# Correct Styling in Indesign for Successful EPUB and XML Conversion

These guidelines are intended to provide best-practice techniques that can be used when styling InDesign documents in order to ensure that content can be converted to EPUB and XML in an efficient and productive manner.

### Pros for using Styles in InDesign

* By using the Paragraph, Character, Table and Cell Styles elements contained within InDesign, any content that is assigned a style can then be converted into a tag for XML. The use of styles in InDesign is on a level par with the creation of tags within an XML document. Correct use of styles means that any title can be easily converted into EPUB, XML, HTML etc. Creating and applying styles in InDesign is identical to tagging the document.
* If a document is styled correctly in InDesign, alterations can be made globally rather than having to apply direct formatting. For example, if it is necessary to alter the size of a heading this can be made quickly by altering the style rather than having to search through the whole document and manually altering one by one.
* Using Tables and Cell Styles when formatting tables/cells not only makes the application of a design onto a table/cell quicker and more efficient but the attributes applied will also be carried through in the tagging when the document is converted to XML or EPUB. Use of Table/Cell styles also aids in consistency when formatting tables throughout a document.
* By using a styled Word document to flow into InDesign, styles will already have been created and will automatically be recreated in InDesign. Alterations to the look of the styles (i.e. font, size) etc can be made, making the overall production and layout of a book a much faster and efficient process. Similarly, if a styled InDesign template exists for a series of books, when importing a styled Word file, the book will automatically take on the correct styling/design meaning that only widows, orphans and page breaks are left for the designer/typesetter to set.
* By ensuring style names are kept consistent throughout it would be possible in the future to be able to consider combining content from several books without encountering any major problems. For example, taking recipes from various author’s cookbooks to combine into a ‘Best of’ compendium or combining two dictionaries into one. Comprehensive styling should exist following the Style Guide.

### Styles explained:

*Paragraph Styles*: control how the text should generally look. For example the first full out paragraph on a page, main text indented paragraphs, headings, displayed text etc.

*Character Styles*: applied directly to text but do not control the general format of the page. To be used to retain use of italic, bold, superscript, small caps etc.

*Table Styles*: control the general format of how a table should look. Along with the size, space before and after the table, header and footer lines can be created for tables that flow over multiple pages.

*Cell Styles*: control the look of individual cells in a table. For example, you would use a Cell style if you wanted to create a single cell (or row of cells) within a table that has a background tint

### Naming of Styles

It is extremely important that the use of styles and the naming of styles within InDesign is kept consistent. As in styling in Word, the consistency must be in the style name rather than the formatting that they represent. Style names should be kept consistent so that they can be applied across a full range of titles – from a children’s book to a recipe book, or, a bilingual phrasebook to a work of fiction.

### Creation of a Style Guide

It is highly recommended that a *Style Guide* is created that must be adhered to at all times to keep the naming and application of styles consistent. The styles in this guide can be added to when new styles need to be created and then applied on future titles. The creation of a Style Guide will ensure that all titles are styled in the same manner. Therefore, when converted to XML, every title will have the same tagging system. This guide should be strictly controlled as any changes will follow onto the processes required to convert to XML.

A basic Style Guide should include some of the following:

|  |  |
| --- | --- |
| *Paragraph Styles* | *Character Styles* |
| BT – book title | I – italic |
| AUT – author | B – bold |
| CN – chapter number | BI – bold-italic |
| CT – chapter title | SC – small caps |
| FO – full out or first line | AC – all caps |
| TXT – main indented text | SUP – superscript |
| DIS – displayed text | SUB – subscript |
| AHEAD – a heading | REF – reference |
| BHEAD – b heading | ISBN – isbn |
| CHEAD – c heading | SP – special character |

**Paragraph Styles *versus* Character Styles *versus* Direct Formatting**

In our opinion, both Paragraph and Character styles are equally important. Paragraph Styles are inherently important in the overall look of the page, but Character Styles hold equal importance in the retention of bold, italic etc throughout a document, thus for successful conversion to XML should always be tagged throughout. The amount of Character Styles contained within a document will be related to the subject matter of the book. For example, a dictionary or phrasebook will require the use of many more Character Styles than a trade fiction book that may only contain small use of bold or italic. Character styles can be very easily applied through a simple search and replace function in InDesign.

Direct formatting should now be seen as the ENEMY. Any matter that has direct formatting applied to it will not be styled correctly and therefore in the XML conversion will not be tagged correctly meaning that important text may go missing in any conversion process.

Paragraph *versus* Character *versus* direct formatting – Paragraph and Character win!

**Object Styling leads to a more productive workflow**

The use of Object Styles within InDesign will not inherently affect any conversion to XML but will make the layout and setting of a title a faster and more efficient process. By applying an Object Style to an object that needs to be continually inserted into a document – the insertion of this object becomes a slick process. Not all titles will require any Object Styles, in fact most basic Trade Fiction will not require any at all.

An object can be anything from a tinted circle, a two-columned text box etc that needs to be inserted into a document. Object Styles can be created for both graphics and text frames. For example, a recipe book – the design might require the list of ingredients isnin a double column but the method in a single column. By creating an Object Style for a double-columned text box the process can be automated from changing from double-columned text to single by the click of a short-cut key linked to the Object Style. No more laborious navigating various menus to alter the look of the text box – it can all be set in the Object Style – extremely time-saving.

Equally as important and time-saving as Object Styles are *Object Libraries*. Object Libraries in InDesign help organize the graphics, text and pages that are most often used. Rather than navigating around the computer system to continually find graphics or text that to insert into the document, they can added them to an Object Library and simply dragged and dropped them onto the page as needed. Again the use of Object Styles or Object Libraries will not affect any conversion to XML but will enhance the overall ease of the production workflow in the setting of titles.

**Images and the conversion to XML – how should they be tagged?**

It is necessary to ensure that any images are embedded and up-to-date in the InDesign file. This can be checked through the Links palette. Images can either be placed in the document or anchored in with the text so that if the text reflows the image moves with it. If all images are up-to-date and embedded they will automatically be tagged in the conversion to XML. By exporting the document as an IDML file, all content will be tagged for the correct conversion to XML.

**Styling for XML – a conclusion**

* Any book is suitable for conversion to EPUB, XML, HTML etc as long as it has been styled correctly.
* InDesign Styles = tags in XML.
* The creation and management of a *Style Guide* will enhance the productivity of any conversion to XML.
* Consistency in styling and naming is key.
* *Paragraph*, *Character*, *Table* and *Cell* Styles must be used throughout in the setting of any title.
* Direct formatting can be seen as the ENEMY in any XML conversion process.
* *Object Styles* and *Object Libraries* enhance the efficiency of the production process.