

This document contains general InDesign formatting rules for common and complicated formatting situations across all documents.

## **File Naming Conventions**

We follow strict file naming conventions in order to keep track of what document we are working on, which edition it is part of, and who is working on the document. These naming conventions also tell our transformation script how to process our InDesign files when transforming them into TEI-XML. Please review the METS File Naming Conventions and the METS File Naming Dictionary before creating any files.

## **General Formatting Rules**

Our online formatting is being controlled by a CSS, which means that all formatting commands / guidelines will be universal across editions. This means that all editions must be formatted identically, with no exceptions to formatting guidelines, as we will be unable to replicate these exceptions online. Formatting is assigned via Paragraph and Character Styles in InDesign. These Styles determine the appearance of the edition within a print volume and online; in order to sustain consistency between print and online, you should not add formatting outside of these Styles (ex: italics, extra spacing between paragraphs) to print editions, as it is not possible to replicate that formatting online.

There is no semantic tagging for the apparatus (Front Matter, Introduction, Notes, Glossary, Bibliography, Indices, Appendices) of a volume, only for the text. You must use styles that apply formatting in the apparatus but will not use any tags that apply semantic meaning outside of this formatting. In Facing Page, only semantically tag the original language, not the modern English translation.

By the time the edition is formatted in InDesign, it has gone through a series of reads and corrections in a Word Doc, so the formatting there should more or less conform to our Style Guidelines. There may be some slight deviations with spacing and alignment, but most formatting, such as italics, will be corrected in the Word Doc. While formatting, you should replicate the format of the source text, unless it clearly violates one of our Style Guidelines. In these instances, default to the standards outlined in the InDesign instructions and bring any questions to the Managing Editor.

Always begin formatting with the first document in a Book (Front Matter: Dedications, Acknowledgements, and Abbreviations List), and then work through the Book in document order. This will prevent undue formatting and pagination issues. Follow the Table of Contents provided by the edition editor.

## Common Rules

Whenever you work in InDesign make sure you have the hidden characters and the override highlighting turned on. This will identify any formatting errors, including ones that are invisible, like overrides between Paragraph Styles. These types of overrides will affect spacing in the print edition and will cause errors in the export, so make sure to remove ALL of them.

For the following hidden characters, delete them and replace them with a typical space (punctus) or eliminate them entirely if an extra space isn't needed.

Hidden characters indicating spaces: colon

Greater Doxology, tradition  
century pope Telesphorus, c  
e Vulgate (Myers, *Hymn*  
nea,” p. 267). The hymn v

Hidden characters indicating spaces: caret

43 » Fitzjames, *Sermo die lune in ebdomada Pasche.* 11  
used between 1491–1499. (McKerrow, *Printers' c*  
46 » Dickens, *English Reformation*, p. 28. #  
47 » Marshall, *Heretics and Believers*, pp. 90–91,

Fun new hidden character: a tiny dash in the middle of words

syth·we·must·departe·h  
secretly·tyl·that·Parys·  
hymself.”·Thenne·they·

Also sometimes there are just extra tabs within texts that are hard to spot in Word:

for all were heede no thee, th  
dolorous moder stode, yf happ  
no» helpe of her for she was fay

Use the embedded formatting in Paragraph and Character Styles – unless specifically outlined in the formatting instructions, you should never alter the formatting of these Styles. Common errors include:

- Adding additional paragraph ends (i.e. hard returns) between paragraphs in order to create larger white space between paragraphs
- Adding tabs to the beginning of a Body First P. Style

If you find yourself adding formatting, review the InDesign Styles to ensure that you’re using the correct one. In the example above, Body First does not have an indent, whereas Body does; so if your paragraph requires an indent of the first line, make sure you use Body. If there are no options that will correct this formatting, note the location and describe the formatting that needs to be added and post a query in the InDesign thread on Slack. Make sure to tag the managing editor – we may have to make a new ID style to accommodate.

**Tagging Character Styles on multiple lines:** This can introduce errors when we convert our InDesign files into TEI. If you select multiple lines at once and apply a Character Style to all of them, you will most likely catch extra text or hidden characters that are supposed to be tagged differently. For example, in verse, glosses will often interrupt the tag.

kalens        *first day*  
Of Marche

For styles like Latin or French, do tag on both lines, as you want to style the entire foreign language phrase, but only select the text / phrase on each line that needs to be tagged Latin or French. For Person Name, Place, or Date, try to tag the most meaningful piece of information – in the above example, you would tag “Marche” but not “kalens.”

**Caesura:** If there are caesuras in the verse, they need to be tagged for export purposes. There should be 6 spaces to each caesura. Highlight the 6 spaces and tag with **Character Style** “Caesura.”

And he that haveth this rym iwryten, . . . beo hwat he beo,  
 God, in thisse lyve . . . hyne lete wel in heo,  
 And alle his iveren, . . . bothe yonge and olde,  
 God, heom lete heore ordre . . . trewliche her holde,  
 That hi mote togadere . . . cume to heveriche blysse,  
 Hwanne hi schullen to party . . . ut of lyve thisse.  
 (lines 697-702)<sup>124</sup>

There should be exactly 6 spaces. Tag the 6 spaces as C. Style "caesura."

**Ellipses:** There is no Character Style for ellipses; this is purely formatting. For all ellipses in the edition, including for catchphrases, only use 3 periods and place one space between each period and on either side of the quoted text.

- Ex.: We've had one, yes, but what about second breakfast . . . elevenses, luncheon, afternoon tea

Ellipses in catchphrases are 3 periods with a space between each period.

bardy his command center.<sup>¶</sup>

19 » *Constansious*. Constantius VI (771–c. 805), a Byzai  
 110–24 » *the holy croun . . . Withouten ani lesing*. The list of re  
 Charlemagne is most impressive. It includes the Cru  
 of St. Simon (on whom, see the note to line 111–b)

**Em-dash:** There should be a space before an em-dash and after an em-dash to offset it from the surrounding words. Use shortcut alt+shift+- to insert an em-dash

- Ex.: Nonsense – it's ridiculous!

Use em-dashes with a space on either side of the dash to separate clauses in text. The dash in the block quote is an em-dash. The dash in the paragraph is not.

[What, therefore, is my plan? To do that which our ancestors did in the war with the Cimbri and Teutones, one that is utterly unequal to this war: men who locked themselves away in their towns and compelled by a similar want of resources nourished themselves with the bodies of those who seemed, because of their age, useless towards the war effort — nor did they hand themselves over to the enemy.]<sup>¶</sup>

Caesar's prefatory remarks emphasize the "singular and nefarious cruelty" (*propter eius singularem et nefariam crudelitatem*, 7.77.2) of the speech – it is in fact the entire reason Caesar records it (all the more notable because it is one of the rare speeches in direct discourse in all of Caesar's extant writings). For Caesar's immediate purpose, this allows him to continue his characterization of the Gauls as "barbarians" and

**En-dash:** Use an en-dash between ranges of numbers. Use shortcut alt+- to insert an en-dash

FN 5: en-dash

FN 6: not an en-dash

5 » *The Gallic War* 7.77.13–14, trans. Edwards<sup>#</sup>

6 » On Caesar and barbarians, see Mannetter, "Narratology in Caesar," pp. 1-54; Barlow, "Noble Gauls"; Johnston, "Nostri and 'The Other(s)'; and Schadee, "Caesar the Ethnographer."<sup>¶</sup>

**Forced Line Breaks:** These are used in verse at the end of lines that are grouped within the same stanza. The keyboard shortcut is shift+enter.

**Fractions:** These are rare but can occur in manuscript descriptions. For these, it is important to have the highlight override turned on. For "typical" fractions (ex: ½, ⅓, ¾, etc.) InDesign will

format these automatically as fractions. For unusual fractions (ex:  $\frac{5}{8}$ ) InDesign will not format these, and they will either look weird or be overridden. For these unusual fractions, you will have to highlight the entire thing and select the “Fraction” Character Style. For “typical” fractions, **do not** tag them with a Character Style.

**Indentations:** Verse and Drama texts may contain different indentation at the beginning of lines. In this instance, you should best try to replicate the indentations in the original Word Document. We have up to 8 indentation depths and these are set in the tab settings of Line Group Paragraph Styles.

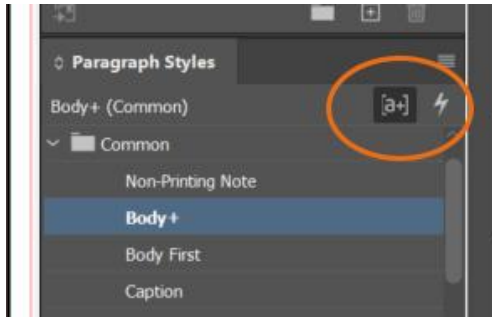
Every verse text should have at least 1 indentation at the start of each line, which offsets the line from the left margin and the line number. Use additional tabs for each new level of indentation. Be sure to be consistent and make sure you are applying the same level of indentation to lines that the editor has indented.

**Drama Speech Lines:** In drama, lines are occasionally broken between speakers. When this occurs, try to indent so that the new line of speech is indented roughly in line with the end of the previous line of speech. This will indicate to readers that these lines are continuous.

**Nested Tagging:** InDesign can only nest one Character Style inside one Paragraph Style, so you cannot nest two Character Styles or two Paragraph Styles. Sometimes this will be an issue in regard to semantic tagging. When this occurs, make note of where in the text it occurs in an oXygen Interventions spreadsheet, following our best practices. Since the tagging will occur in oXygen, page numbers are not a useful reference, nor are line numbers in prose. You should include a phrase that you can ctrl+F, and be specific about the tag and the exact words that should be tagged. In verse, you may also include a line number.

**Overrides:** There are overrides in your text when there is a + sign next to a Paragraph Style name or when the text in your document is highlighted turquoise, when the “highlight override” is turned on. Styles are overridden when text holds formatting from imported documents rather than the formatting embedded in our Paragraph Styles. This can be a useful tool while you’re formatting a text, but it needs to be resolved so that all of our published texts are consistent.

**Highlight Override:** This is the button that is in the Paragraph Style menu and should be turned on anytime you are working in an InDesign Document. Refer to image below.



**Clearing Overrides:** Use the clear override button or alt-click on the Paragraph Style+ in order to remove all overrides in a given Paragraph Style. Refer to image below.

Note the turquoise highlighting and the + at the end of the P. Style-- that means the style is overridden. Clear the override by alt+click on the P. Style or by clicking the clear button (circled right).

**Person Name:** used to tag all proper noun names for people or people-like beings. Certain names may not be capitalized, depending on the editor's preference, so you need to read carefully in order to determine whether or not to apply the Character Style. Keep the Style Reference open as you apply tags in order to ensure that you are properly tagging people.

**Place:** used to tag all named places, real or imaginary. Certain places may not be capitalized, depending on the editor's preference, so you need to read carefully in order to determine whether or not to apply the Character Style. Keep the Style Reference open as you apply tags in order to ensure that you are properly tagging places.

## Using Ctrl+F to tag repeated names or places – don’t!

Although InDesign does have the ability to tag multiple names at once, don’t. You really need to work your way through the text, line by line, in order to ensure that you’re capturing all Middle English variations of names and that you are not erroneously tagging names or places.

## Common font styles to look for in each section of text

Semantic tagging in texts – such as “gloss,” or a language tag, which apply italics – supersedes the use of these tags. Use the following font styles when you need to apply specific formatting to a word or phrase but there’s no semantic component to the tag or for most formatting in the apparatus. Replicate the formatting present in the text, using the follow tags:

**Bold**

**Bold Italic**

**Bold Small Caps**

**Italic**

**Italic Strikethrough**

**Small Caps**

**Underline**

## Instructions for List Bullet / hierarchies

When creating a bulleted list in InDesign – which often occurs when listing MS variants in introductions – make sure that you use the List Bullet Paragraph Style. If you need an additional level within the list, you would use List Bullet 2 for the second level.

As you are formatting, make sure that you clear any paragraph overrides between Paragraph Styles as well as the paragraphs themselves. These types of overrides interfere with the code and also alter the spacing of the print edition.

**Drama: Line Numbers and Speaker overlaps:** occasionally line numbers will appear on the same line as a speaker. In this instance, you will use the next line for the line number so that the speaker remains in the left column.

- Ex: Instead of 105 **Abraham** use **Abraham**

106

**Drama: Foliation and Speaker overlaps:** Occasionally folio numbers will appear on the same line as a speaker. In this instance, you will place the folio number directly above the speaker’s name on an unnumbered line. Foliation should also be placed above Stage Directions, but they can coincide on the same line with a Scene Location. Print Only Exceptions: stanzas that are preserved as a unit with speaker changes. In Print, we keep the Foliation with the Glosses. In

Export, we will insert the Foliation on a blank unnumbered line. In Print, Foliation should NOT receive a paragraph break - for spacing, make sure a forced line break is applied. In Export, re-insert the paragraph break.

Ex: fol. 105r	[ <i>Rome</i> ]
<b>Abraham</b>	Hello

**Scene Location:** receives the Paragraph Style Scene Location. There should be one tab inserted before any text so the scene location in question is in line with the rest of the text.

**Stage Direction:** applied to stage directions, frequently in Latin, within a drama text. Applies italics. Flush with left margin. For any associated glosses, add a footnote and tag as Footnote Gloss, as in Prose. Semantic Tags will apply.

## Standard Formatting for Glossaries

All glossary entries are single-spaced, with no spaces between entries and double-spacing after the headword.

- The headword should be bold [use Character Style “Bold”]
- the definition should be italic [use Character Style “Italic”]
- any punctuation and word forms should be roman [no Character Style applied]

## Standard Formatting for Proper Noun Indexes

All index entries are single-spaced, with no spaces between entries.

- The index entry in the original language should be bold [use Character Style “Bold”]
- Translated forms of the entry should be bold italic [use Character Style “Bold Italic”]
- The textual references (which could be article, line, or paragraph numbers) should be roman [no Character Style applied]

## Standard Formatting for First Line Indexes

Italicize titles, incipits, Latin. Everything else in roman.

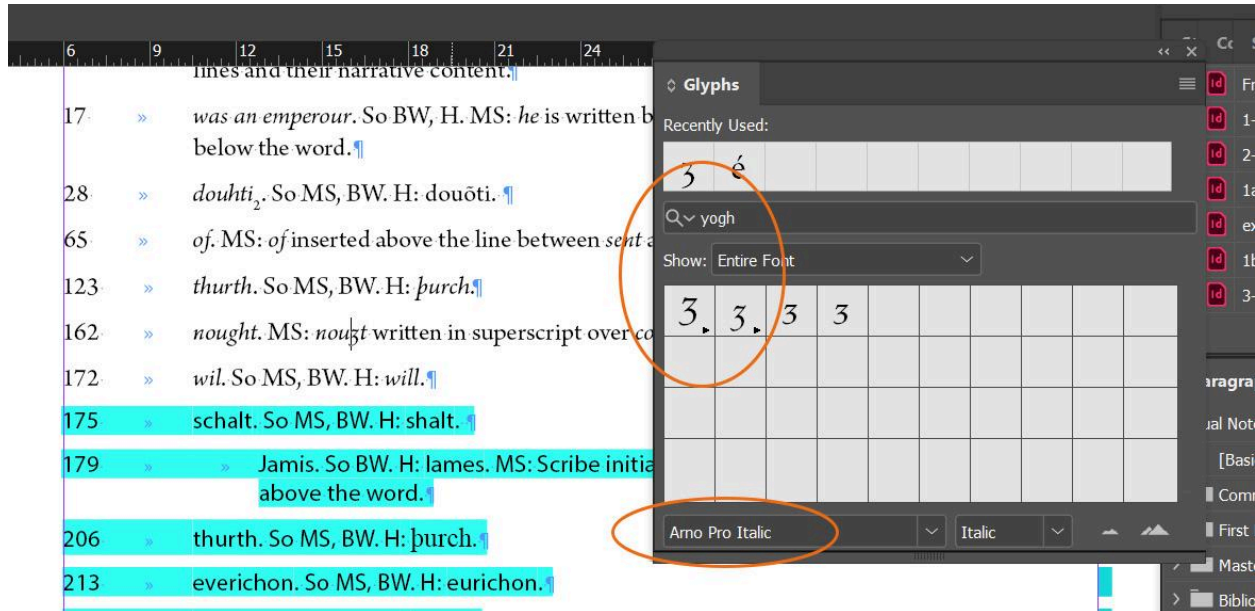
## Middle English Characters

For Middle English characters like yogh, thorn, and edth, you will likely need to insert these into the text.

Click into the text where you need to insert the character.



- ❖ In the upper menu, select Type→ Glyphs.
- ❖ The Glyphs pop-up menu will appear. Select the font “Arno Pro” in the bottom dropdown menu
- ❖ Type the name of the Glyph (ex: yogh) into the search bar.
- ❖ Choose the correct Glyph--either uppercase or lowercase, not small caps--and double-click on it.
- ❖ This will insert it into the text.



### Wynn Character Style:

- ❖ Use Cambria italic font
- ❖ Tag the wynn with the Character Style “Wynn.”

### Diacritic Character Style:

- ❖ Use when you find a special character that is not Middle-English specific and is not part of the Arno Pro font family; typically macrons, etc.

### Completing a Text Frame

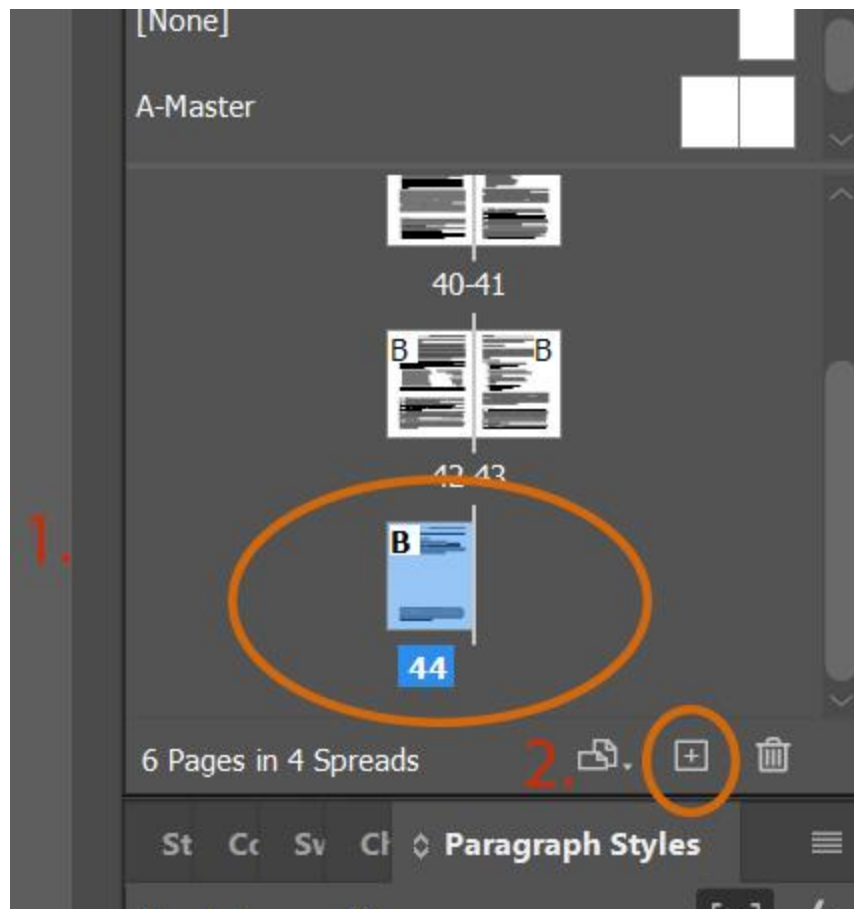
In Design marks the end of a text by a #. After you format any individual text frame, you should make sure that this # appears directly after the final punctuation or letter in the frame.

670	»	Have me excusid; my name is John Lidgate.↵	
	»	Of her tunge I have no suffisaunce	» <i>their language; fluency</i>
	»	Her corious metris in Englisshe to translate.	» <i>Their unfamiliar meters</i>
	»	<i>Here endith the Daunce of Deeth.#</i>	

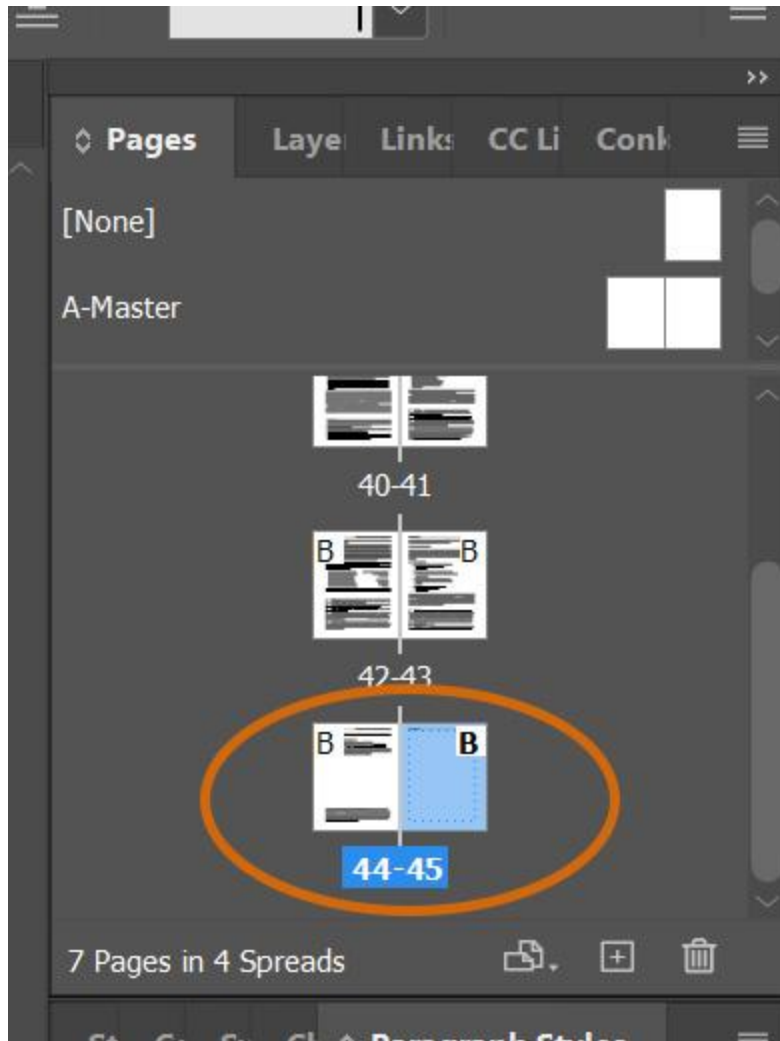
## Document Pagination

Pagination should be more or less set before you move onto a new document in a Book. This is especially important for Prose, but changing pagination can be problematic in all InDesign documents.

- ❖ Scroll through and make sure no extra blank pages have been added throughout your document. Also check for extra pages at the end of the document. Delete as needed.
- ❖ If your text ends on a verso page, congratulations! You don't have to do anything.
- ❖ If your text ends on a recto page, you need to add a blank page to the end of your document.
- ❖ In the Pages menu, double-click on the final page of your text. You'll know it is selected when it turns blue.
- ❖ Select the plus sign at the bottom of the menu.
- ❖ \*\* The exception to this is if your next document is a Facing Page text. For that, the first page actually needs to be a verso page, so if your text ends on a recto page, you're fine. If it ends on a verso page, you will need to add an extra page.



- ❖ This should add a page. Make sure that page has the Body Parent Page applied to it



- ❖ If, for some reason, at the end of your document there are multiple blank pages, you can double-click into the extra page and select the trashcan at the bottom of the Pages menu to delete it.