Read the *entire* instructions before you try to follow them. Knowing where you are going will help.

How to Make a New Document in InDesign / Add it to your Book

All InDesign documents are created using the same initial steps:
- ❖ In the InDesign launch screen, select New→ Document. OR, if you are already in an InDesign document, select File→ New → Document.
- ❖ This will open a new window where you can set options for the layout. Select **METS book**, which contains the proper layout for all of our documents. Then click **Create**.
- ❖ When the document opens, File → Save As. Check that you are saving into your editor's folder. Name the document, following the naming conventions outlined in the Formatting Reference.
- ❖ Add this document to the editor's book, see instructions below.

Adding new documents to a **Book**:
- ❖ Double-click the file name of the **Book**. This will launch InDesign.
- ❖ Look for a small, dark gray square that should appear in the middle of the screen. The editor's name will appear at the top of the square; this is the editor's **Book**.
- ❖ There is a taskbar at the bottom of the **Book**; click the + sign. This will open a standard file folder.
- ❖ Select the editor's folder → the name of the document you want to add
- ❖ This will add the document to the book.

Sync the document with the Book:
- ❖ In the small, gray book menu, make sure the sync symbol is next to the **Front Matter Template**
- ❖ Click on the hamburger menu (the three vertical lines) in the upper right corner and select Synchronize Options → check the box marked **Parent Pages** (all other boxes should already be checked) → **Synchronize**.
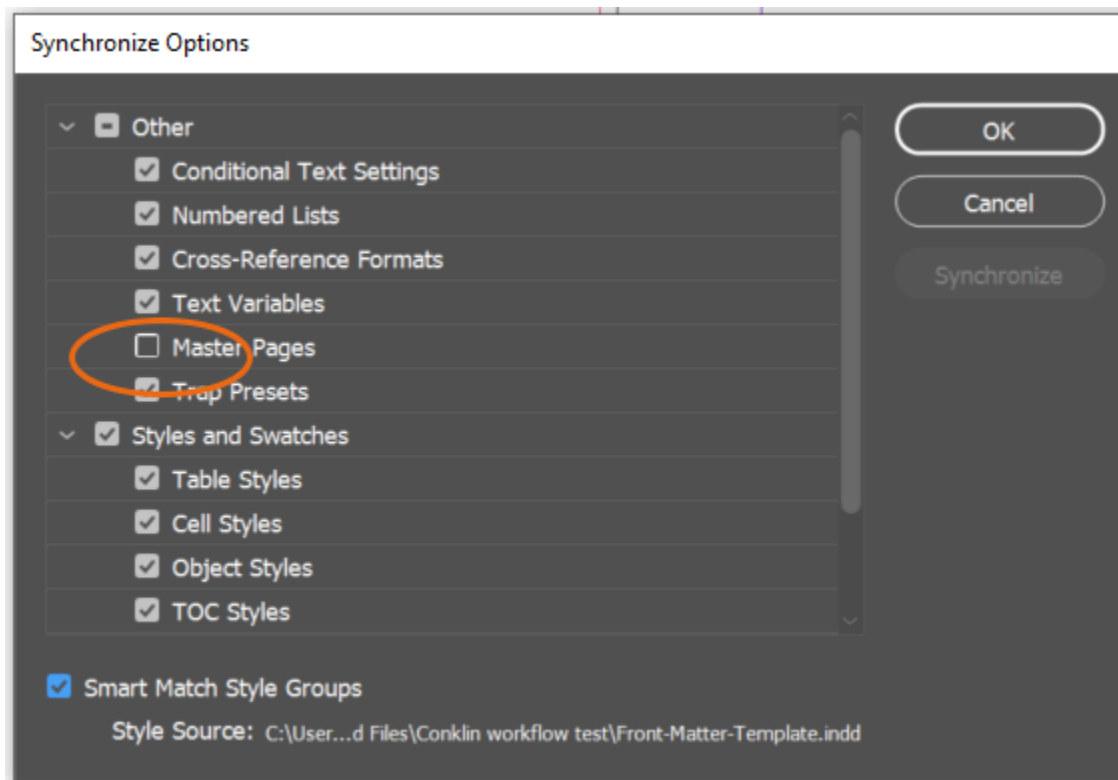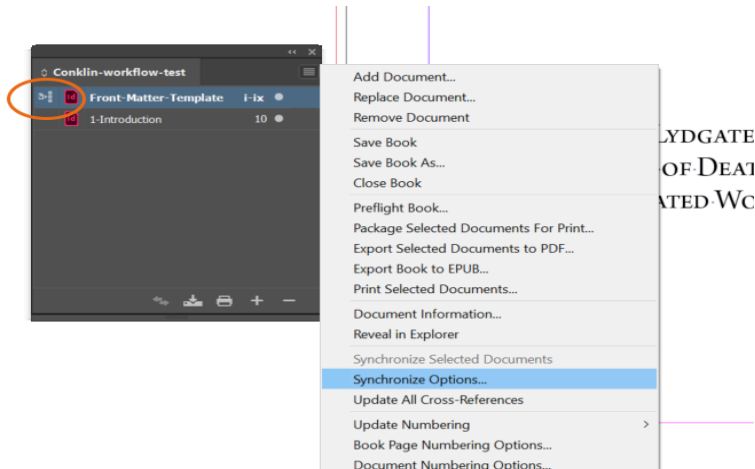
❖ It looks like nothing happens, but the **Parent Pages** (formerly called Master Pages) and **Paragraph** and **Character Styles** will be added to your new document.

Note: If you rename, move, or delete items that are in the **Book**, you will have to remove them from the **Book** (- symbol in the book menu) and then re-add them with the new name in order for InDesign to find and update this file and to sync the entire **Book**.

Adjusting Initial Pagination

Facing Page is unique in that the first page of the document should begin on a verso page. InDesign will start documents on either a verso or recto page based on the final page of the document in the book before your current document. So if the previous document ends on a recto page, the next document will begin on a verso page, which is correct for Facing Page. If your text actually begins on a recto page, you must go back to your previous document and follow the Pagination instructions.

Making Pages and Importing Text

When you make a new InDesign doc for Facing Page, chances are that your first page will appear on the right side of the spread. You will need to make sure that you start applying Parent pages and importing text onto a complete spread of pages.

- ❖ In the **Pages** menu on the right, there are a series of icons at the very bottom of the menu. Click on the one that says **Create New Page** when you hover over it. It looks like a page with a plus sign (+) inside. You want to have two pages next to each other in a spread.
- ❖ Set the **Parent Page** for both pages as **F-First** by dragging the words down onto the page. If you are working on prose, choose the **PF-Prose First Parent Page**.
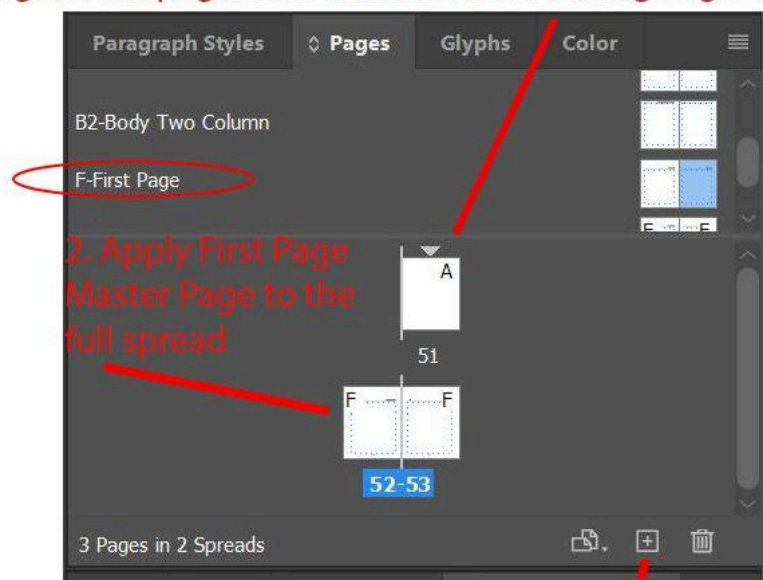
❖ Go to Edit → Preferences → Type → Uncheck Smart Text Reflow. This will keep the document from autofilling pages with the Middle English or the translation when you import the two documents.
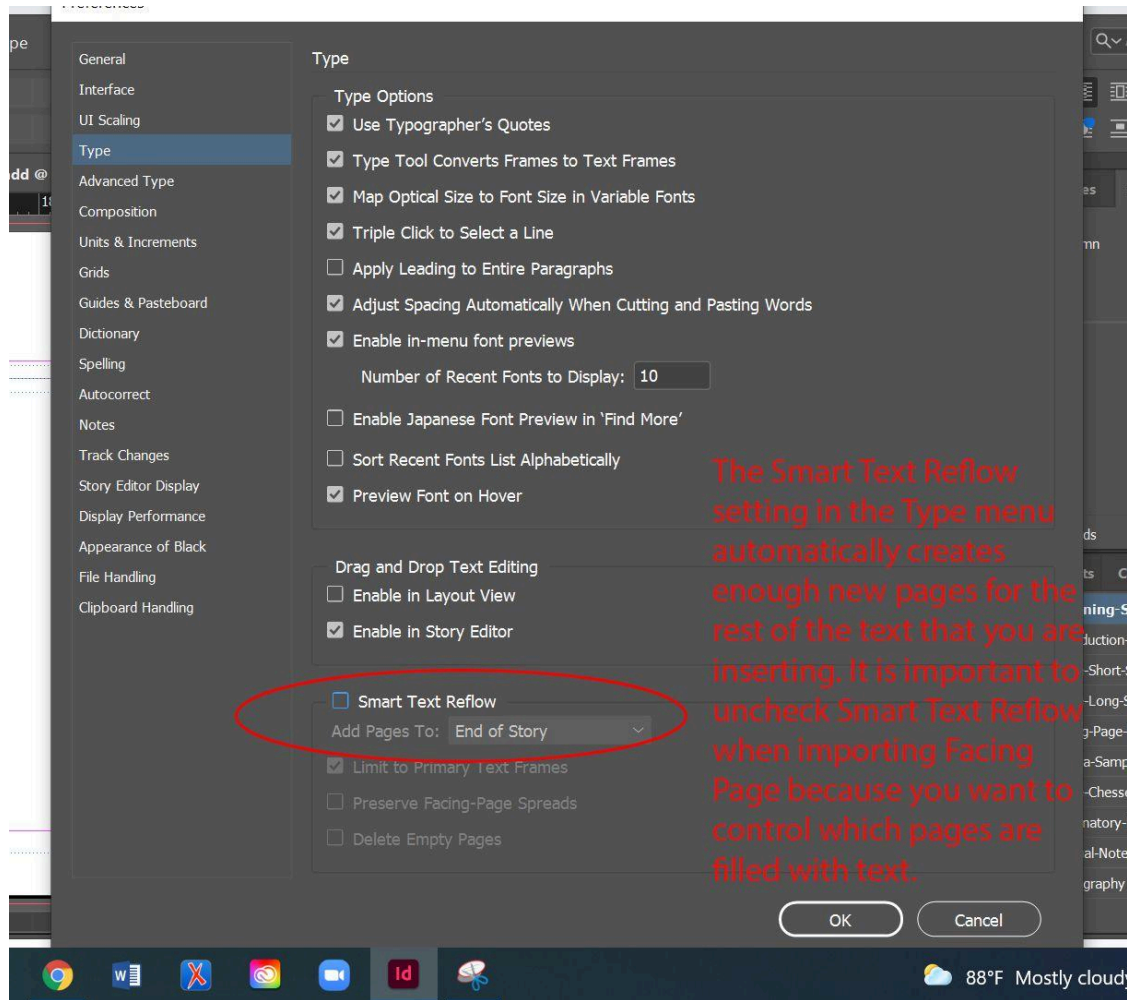
Inserting Middle English/Foreign Language Text: First Page

❖ **In the left page**, **Ctrl+shift+click** inside the text box on the page. This will make a new text box appear. You can tell because little squares appear in the lines at the edge of the text box.
❖ **Ctrl+D**. A file menu will pop up with options for placing the text. Select the relevant Word Document and check the box that is marked **Show Import Options** (it is above the File Name box). Click **ok**.

❖ The **Microsoft Word Import Options** box will pop up. About ⅔ down the box, look for **Manual Page Breaks** and make sure that **No Breaks** is selected in the dropdown menu next to it.
❖ At the bottom of the box, click **Customize Style Import** and then click the round button that appears next to it called **Style Mapping**.
❖ The **Style Mapping** box will pop up with a list of styles that will import from the Word Document. Re-map the drop-down menu to conform to our styles:
   ➢ If a Verse or Drama text:
      ■ Normal → Line Group (Verse and Drama Template)
   ➢ If a Prose text:
      ■ Normal → Prose Paragraph (Prose Template)
❖ If you encounter paragraph or character styles that are connected to revision – such as balloon text/balloon text char, revision, various annotations, or comments, make sure to map these on to [No Paragraph Style] or [None] in order to prevent strange formatting. See screenshot below.

Style Mapping

Microsoft Word Style	InDesign Style
¶ Normal	¶ Body (Common)
¶ Footnote text	¶ Footnote (Common)
¶ Balloon Text	¶ [No Paragraph Style]
¶ Header	¶ [No Paragraph Style]
¶ Footer	¶ [No Paragraph Style]
¶ Revision	¶ [No Paragraph Style]
¶ Annotation text	¶ [No Paragraph Style]
¶ Annotation subject	¶ [No Paragraph Style]
A Footnote Text Char	A [None]
A Footnote reference	A Footnote Number (Common)
A Balloon Text Char	A [None]
A Header Char	A [None]
A Footer Char	A [None]
A Annotation reference	A [None]
A Comment Text Char	A [None]
A Comment Subject Char	A [None]

OK

Cancel

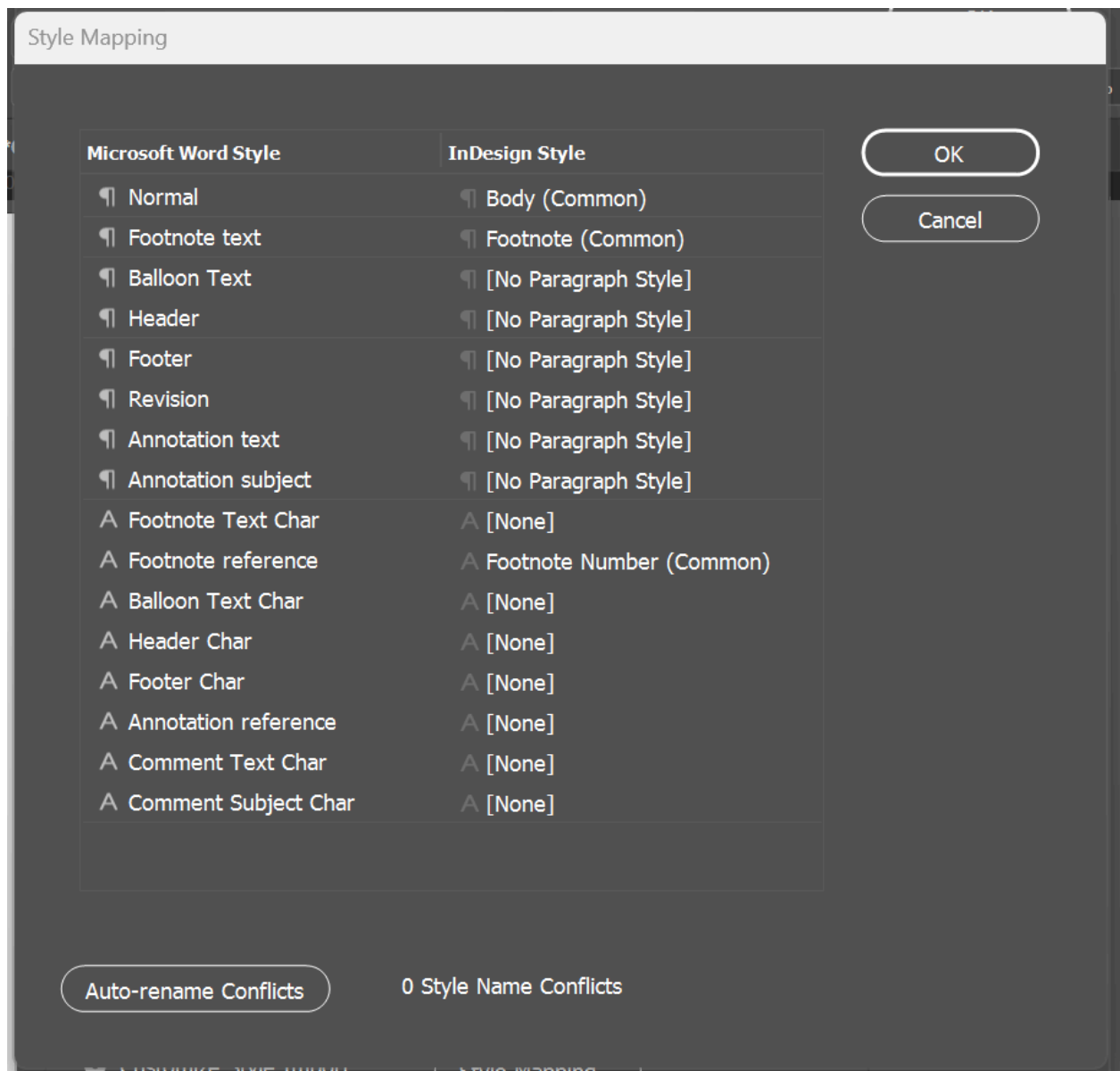Auto-rename Conflicts   0 Style Name Conflicts

- ❖ There may be other choices, and you can use your best guess about how to remap these, but most of this will be fixed in your initial format anyway.
- ❖ Click **OK**.
- ❖ This brings you back to the **Microsoft Word Import Options** box. Click **OK**.

This will leave you with the text imported, but **only appearing on the left side of the page spread**.

Click on the selection tool option for your cursor on the left toolbar (the black arrow), then click off the left text box to deselect it. Then move on to insert the translation.

Inserting the Translation: First Page

- ❖ **In the right hand page**, **Ctrl+shift+click** inside the text box on the page. This will make a new text box appear. You can tell because little squares appear in the lines at the edge of the text box.
- ❖ **Ctrl+D**. A file menu will pop up with options for placing the text. Select the relevant Word Document and check the box that is marked **Show Import Options** (it is above the File Name box). Click **ok**.
- ❖ The **Microsoft Word Import Options** box will pop up. About ⅔ down the box, look for **Manual Page Breaks** and make sure that **No Breaks** is selected in the dropdown menu next to it.
- ❖ At the bottom of the box, click **Customize Style Import** and then click the round button that appears next to it called **Style Mapping**.
- ❖ The **Style Mapping** box will pop up with a list of styles that will import from the Word Document. Re-map the drop-down menu to conform to our styles:
  - ➢ If a Verse or Drama text:
    - ■ Normal → Line Group (Verse and Drama Template)
  - ➢ If a Prose text:
    - ■ Normal → Prose Paragraph (Prose Template)
- ❖ If you encounter paragraph or character styles that are connected to revision – such as balloon text/balloon text char, revision, various annotations, or comments, make sure to map these on to [No Paragraph Style] or [None] in order to prevent strange formatting. See screenshot below.

Style Mapping

Microsoft Word Style	InDesign Style
¶ Normal	¶ Body (Common)
¶ Footnote text	¶ Footnote (Common)
¶ Balloon Text	¶ [No Paragraph Style]
¶ Header	¶ [No Paragraph Style]
¶ Footer	¶ [No Paragraph Style]
¶ Revision	¶ [No Paragraph Style]
¶ Annotation text	¶ [No Paragraph Style]
¶ Annotation subject	¶ [No Paragraph Style]
A Footnote Text Char	A [None]
A Footnote reference	A Footnote Number (Common)
A Balloon Text Char	A [None]
A Header Char	A [None]
A Footer Char	A [None]
A Annotation reference	A [None]
A Comment Text Char	A [None]
A Comment Subject Char	A [None]

OK

Cancel

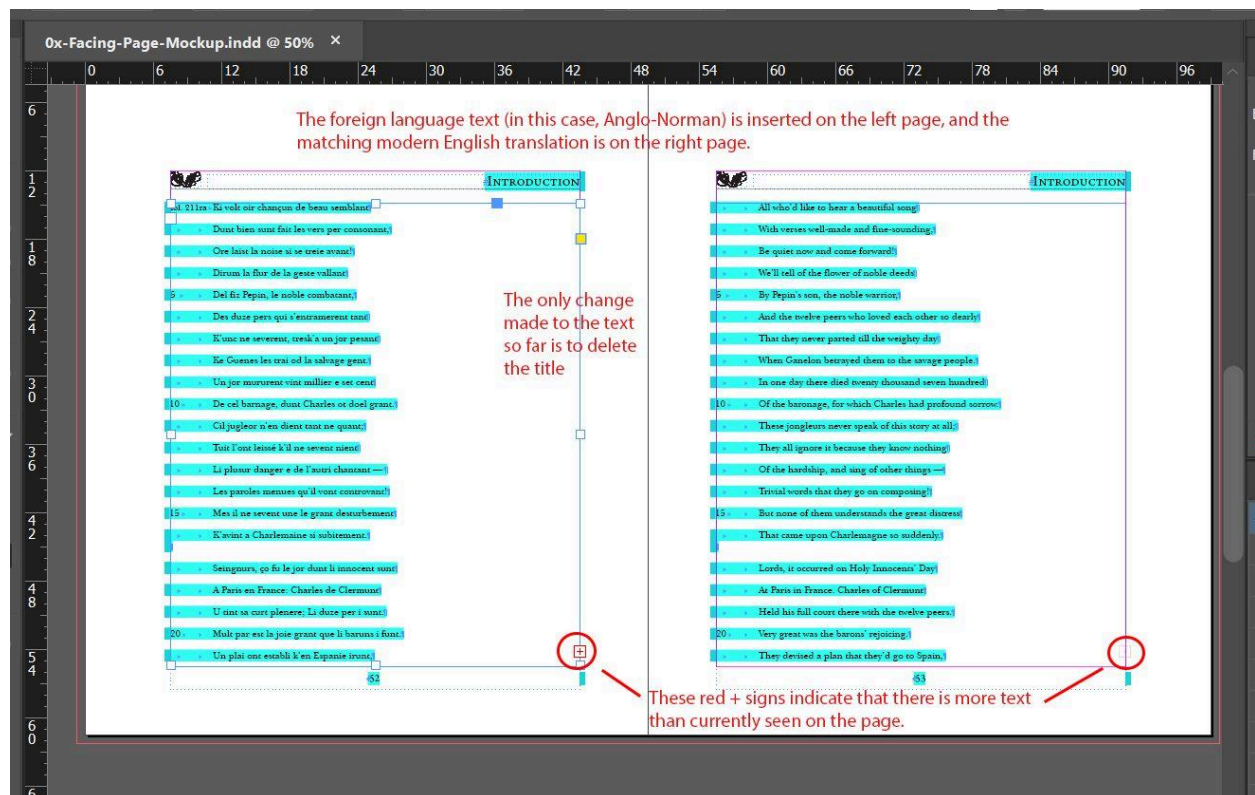Auto-rename Conflicts   0 Style Name Conflicts

- ❖ There may be other choices, and you can use your best guess about how to remap these, but most of this will be fixed in your initial format anyway.
- ❖ Click **OK**.
- ❖ This brings you back to the **Microsoft Word Import Options** box. Click **OK**.

At this point, there will be two pages with text on them, but no more. At the bottom right-hand side of each text box, you will see a small red box with a + sign in the middle of it. This means that there is more text than that particular text box can display at one time. Because you have unchecked the smart text reflow option, importing a document will import all the text from the document, but it will not automatically generate and fill following pages for the rest of the text in

InDesign. This lets us control which pages are linked together, but means that we have to create pages and fill them ourselves.

Sample Facing Page after importing text and translation:

The foreign language text (in this case, Anglo-Norman) is inserted on the left page, and the matching modern English translation is on the right page.

The only change made to the text so far is to delete the title

These red + signs indicate that there is more text than currently seen on the page.

Inserting Additional Pages

- ❖ You need to manually insert the rest of the pages of your document. Make sure you have the **Selection Tool** selected (the black arrow) and click into the textbox on your InDesign document; it doesn't matter where.
- ❖ In the **Pages** menu on the right, there are a series of icons at the very bottom of the menu. Click on the one that says **Create New Page** when you hover over it. It looks like a page with a plus sign (+) inside.
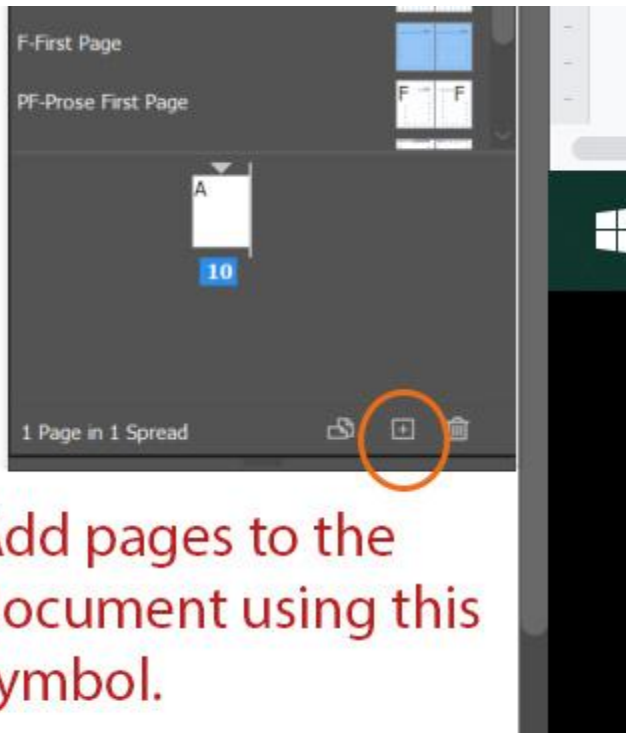
- ❖ This should insert a new page after your first one. This is a little finicky. If it doesn't work, do ctrl+z to undo and try it again.
- ❖ For the new pages, set the **Parent Page** as **B-Body**.

You will also need to thread the text manually.

Adding additional pages:
- ❖ Click on the **Pages** menu, then add two pages using the **B-Parent pages** formatting.
- ❖ Click on the text box on the first left page, then click on the red + box. Your cursor will be replaced by a floating mini-text. Scroll to the next left page and click on the top left corner right at the dotted line. This will create a text box for only this page filling in the next 30 or so lines of the text. This action links these two text boxes together, so if you have to insert a hard return into the first page, the text will carry over onto the next left page, keeping all the original language on the same side of the book. Keep adding more **B-Parent pages** and clicking the red + box until you have the entire text displayed.
  - ➢ If you are formatting a long work in parallel verse, you can add multiple pages at once. Right click in the box where you get small previews of the pages, then click **Insert Pages**. There, you can determine how many pages you insert, where you want them to insert (i.e., after page 11), and what **Parent Page** you want them set as (typically **B-Body**).
- ❖ Repeat step 6 on the right page for the translation.

Some notes before moving on – once the initial pages are set and after referring to Initial Steps all Documents, you will refer to the instructions relevant to your text type (i.e. long stanza, short stanza, or prose).

When tagging, we do not semantically tag the Modern English side. If there are any styles that need to be replicated (See Style Reference for full list), use the appropriate character style. The only exception is for if text has been italicized because a foreign language tag has been applied. The translation on the recto side of the page spread will not need to be italicized to match.

Go to Initial Steps all Documents