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; this usually includes a number that indicates the order of the text and the title of the document. Use dashes instead of spaces in file names.
  - ➢ If the prose text does not have books:
    - ■ Make one InDesign document with the title of the text as its name.
      - ● Ex. 02-Blanchardyn-and-Eglantine
  - ➢ If the prose text does have books:
    - ■ Make a separate InDesign document for each book, with the title indicating the text and book number
    - ■ Ex. 03-Shewings-Book-One
- ❖ 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**.
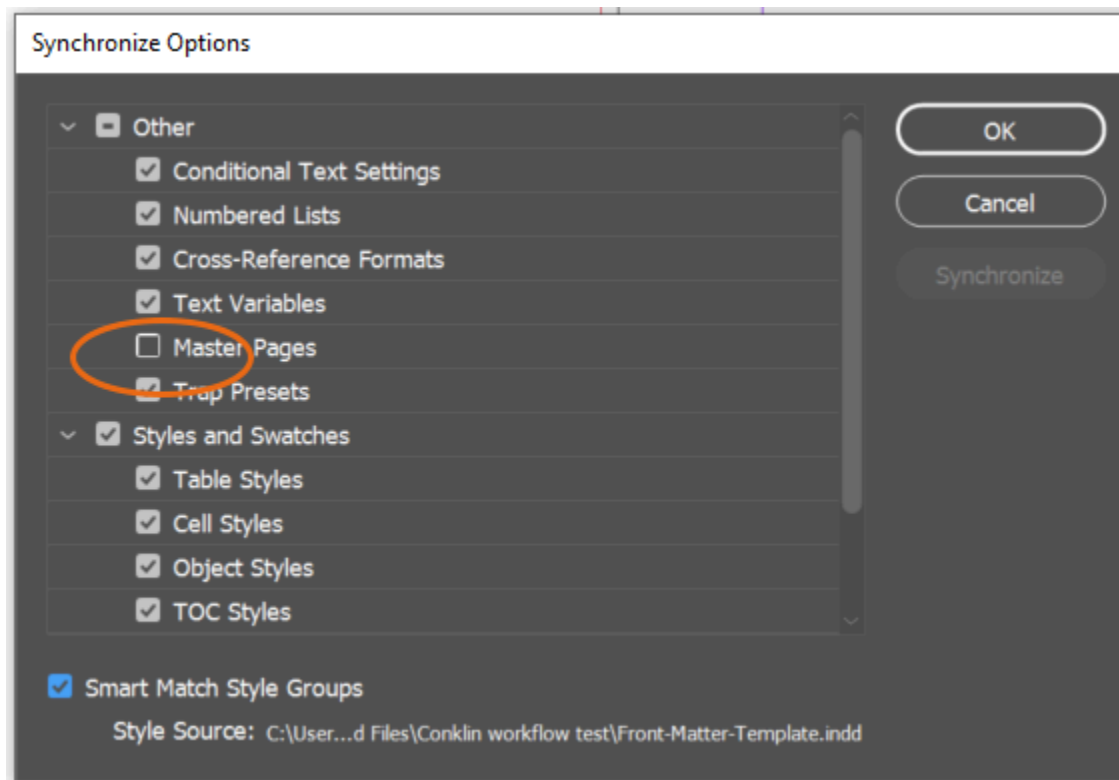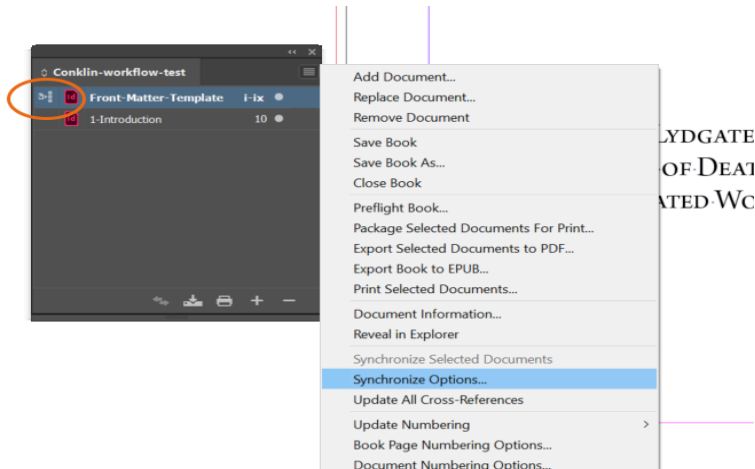
✦ It looks like nothing happens, but the **Parent Pages** (formerly called **Master Pages**) and **Paragraph** and **Character Styles** will be added to your new document.

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

All of our texts (except for **Facing Page**) begin on a recto page, but 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 verso page, the next document will begin on a recto page, which is correct. However, if the previous document ends on a recto page, your new document will begin on a verso page, which is incorrect. To correct this, you must go back to your previous document and follow the Pagination instructions.

How to Insert Text from Word into InDesign

Now that the Word Document has been formatted, return to the InDesign document. In your new InDesign document, set the **Parent Page**.
- ❖ Open the **Pages** tab in the vertical menu on the right side of your screen.
- ❖ You will see a list of **Parent Pages** next to icons that look like the pages of a book. Beneath the list you will see a separate section with one white page. This is your document. The **Parent Page** is probably set to the default, which is **A**.
- ❖ Click on **PF- Prose First Page** (the actual words, not the image), and drag it down to the page icon. **PF** will appear in the upper left corner.
- ❖ Set any following pages to **PB - Prose Body**
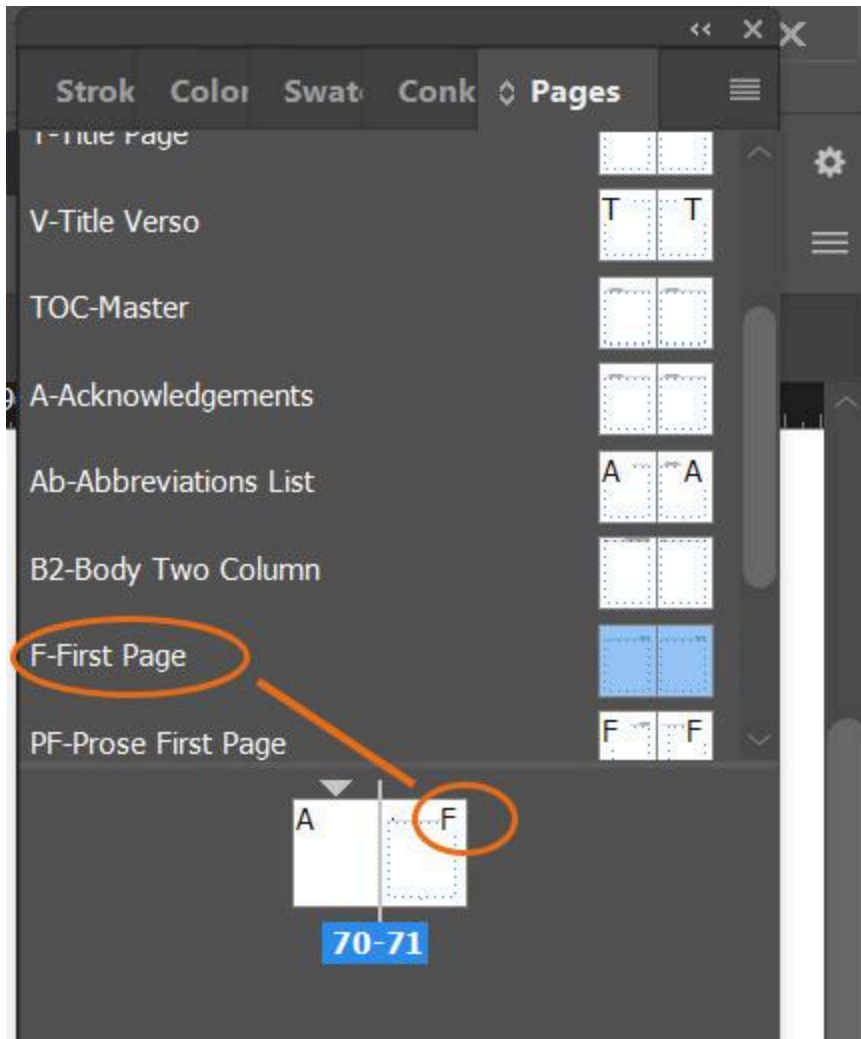
➢ The image is for a verse **First Page**, but the process is the same — just make sure to select **PF-Prose First Page**.

Inserting Text

❖ In the InDesign Document, ctrl-shift-click inside the text box on the recto 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.
❖ In InDesign, ctrl+D [place]. A file menu will pop up. Select the relevant Word Document and check the box that is marked **Show Import Options** (it is above the File Name box). Click **ok**.
  ➢ If the prose text in question has chapters within it, you will need to select the Word Document for the first chapter here.

❖ 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**.
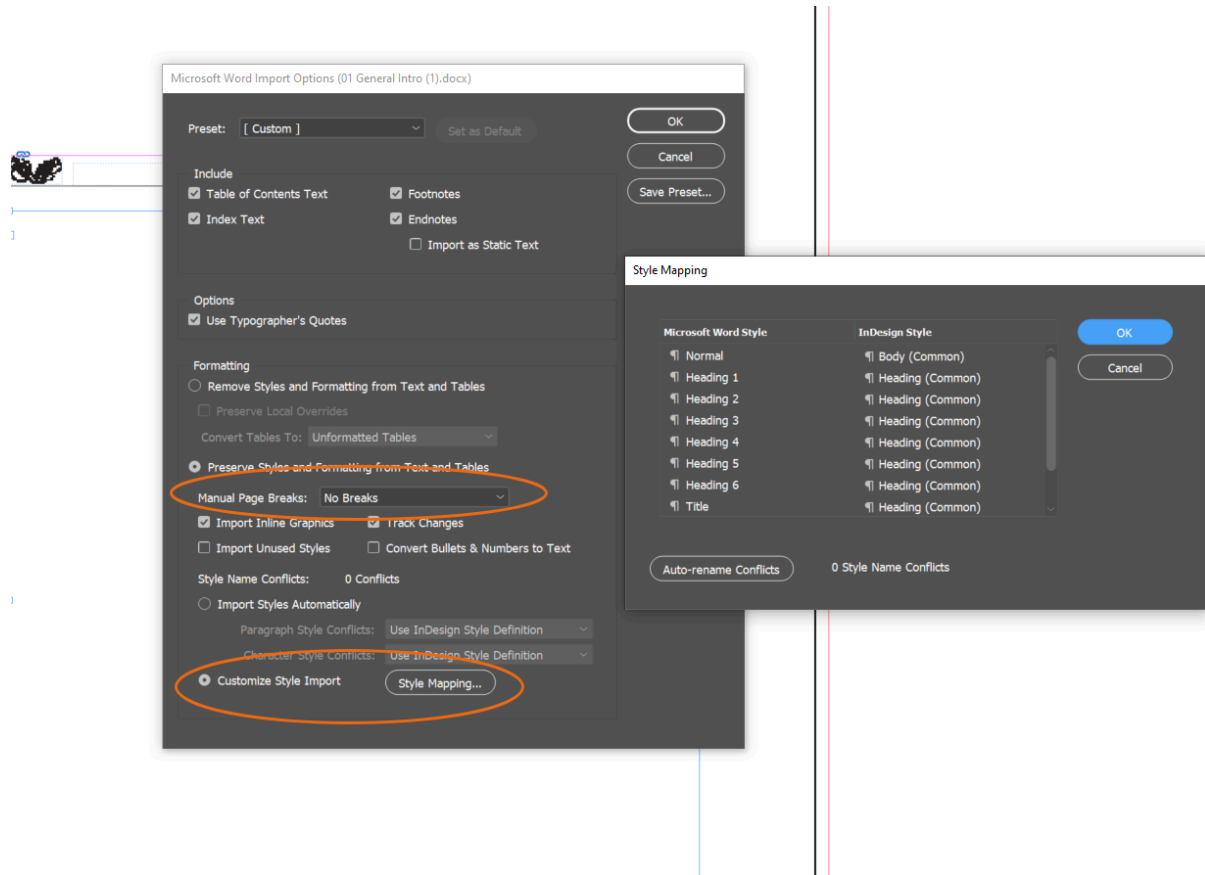
❖ The **Style Mapping** box will pop up with a list of styles that will import from the Word Document. Re-map the drop-down menu to conform to our styles:
  ➢ Heading → Prose Rubric (Prose Template)
  ➢ Normal → Prose Paragraph (Prose Template)
  ➢ Footnote → Footnote (Common)

❖ 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**.

Enable **Show Hidden Characters** (ctrl+alt+i) and the **Highlight Override** feature ([a] at the top of the Paragraph Style menu). Don't do anything before turning these on.

NB: If the prose text has chapters, you will want to format and tag a chapter completely before inserting the next chapter. Since InDesign gets touchy the more you edit text frames, especially with prose, it's best to have everything finished before inserting the next chapter.

Continue on to Initial Steps all Documents