

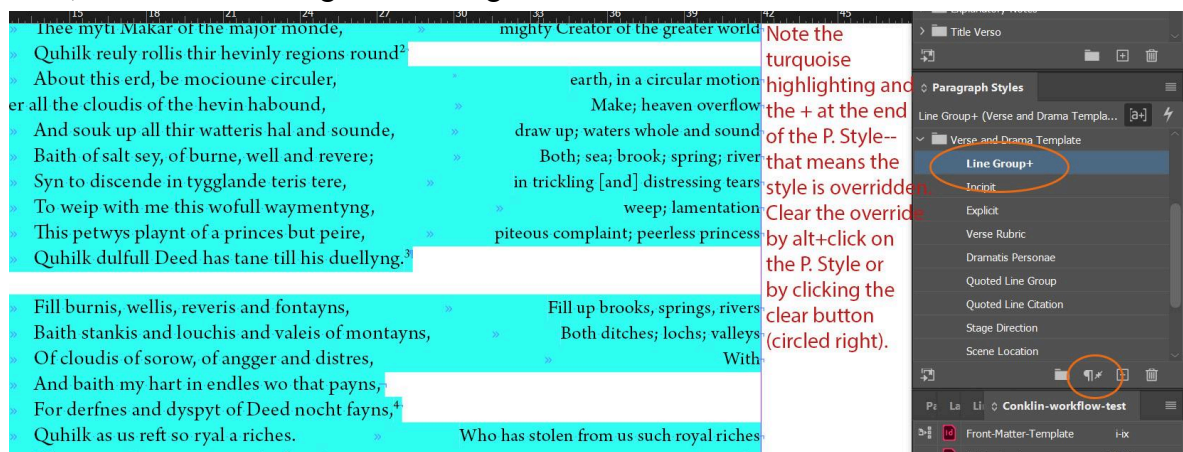
For each section, read the *entire* instructions before you try to follow them. Knowing where you are going will help.

Once we've built the XML InDesign book, we need to go document by document and make any necessary changes for Export. There are three major steps:

- ❖ Delete certain print-specific formatting details.
- ❖ Add in Indicators for Explanatory Notes, Textual Notes, and Glosses according to our Best Practices.
- ❖ Apply the Internal Link character style where necessary: for New Editions and for Backlog Editions.

Make sure the **Highlight Override** feature in the Paragraph Styles menu is turned on. Check and clear any remaining overrides that exist in the text.

- ❖ If there is an override on purpose, make a note of it in the oXygen Interventions worksheet so we can check on it later in the process.
- ❖ Reminder: overrides are the blue highlighting that indicate a style may not be correctly rendered. In the Paragraph Style menu, click the paraph marker at the bottom right. For more, refer to the InDesign Formatting Reference document.



Delete Print-Specific Formatting

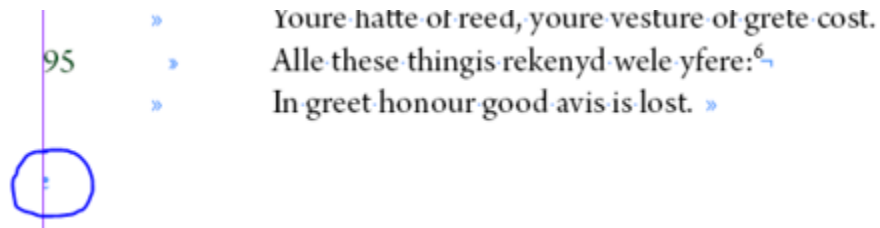
When formatting for Print Production, we make some decisions in InDesign to prioritize the look of the print book. However, we need to undo some of this work in order to prep the files for digital edition.

In Introduction or Headnote files:

- ❖ If the paragraph style Annotated Bibliography Paragraph has been used, replace it with List No Bullet Level 2.

In any Text files:

- ❖ Delete any (see note) or (see t-note) phrases
 - These are typically found in marginal glosses or in footnote glosses
 - If you delete these phrases, make sure to also delete any tabs that were before them. We want the forced line break to hug the end of the last word on the line, not any extra blank space.
- ❖ Delete any added page breaks that were inserted to prevent orphans/widows.
 - Ex:



In any Verse or Drama texts that have speaker names:

- ❖ Check for any long speaker names that have had more than one tab added between the name and the line of text to make the print more legible.
 - If these occur, then delete the extra tabs so there's only one tab between the name and the line of text.
- ❖ Double check that the oXygen interventions spreadsheet includes any Speaker Names that will also need Person Name or Latin.

In Drama texts with Cast Lists:

- ❖ Make sure that any Cast Lists are in their own InDesign document separate from the text
- ❖ The naming convention of this document should end with -DramatisPersonae-Drama

In any Index file:

- ❖ Remove any ornamental divisions between entries. We won't need these online.
- ❖ Be aware that the backlog indices can be complicated; make sure to check through the document you are formatting as you go.

In Index of First Lines files:

- ❖ Delete any styling that prioritizes print reading and information
 - Delete the Heading 3 paragraph styled "Page" at the top of the document
 - Delete any page numbers and tabs so that the end of paragraph is flush with the end of the entry

Insert Indicators

We need to add indicators for Explanatory Notes, Textual Notes, and Glosses so our users can access any additional explanations while reading through the text in our digital editions.

Best Practices for Inserting Indicators:

- ❖ This process is extremely detail-oriented. **Take your time when doing this work.** We want it done as correctly as possible the first time around.
- ❖ Indicators should always be listed in the text in the following order:
 - Any punctuation associated with the last word of the catchphrase, if present
 - Footnotes
 - Explanatory Notes Indicators
 - Textual Notes Indicators
 - Gloss Indicators
- ❖ Typically, it is best to work through inserting indicators in rounds. Start with Explanatory Notes, then move on to Textual Notes, then end with Glosses.
- ❖ Sometimes adding Indicators will make the text overset the text frame, especially in Prose. This will hide some of the text from view. You can tell this happens if, at the very end of your text frame, there is a little red box with a + mark in the bottom right corner. If this is happening, you will need to make the text frame larger in order to see all the text.

Inserting Explanatory Note Indicators

- ❖ Make sure you have both the Text file and the Explanatory Note file open for this process. You'll want to compare between the two documents.
- ❖ You will be inserting an Explanatory Note Indicator (a superscript N) in the text for every single Explanatory Note.
 - Look at the first Explanatory Note. Typically Explanatory Notes will include a line number that is followed by a catchword or phrase in italics.

Job. Protagonist of the Book of Job in the Old Testament, Job is a paradigmatic figure of human suffering and perseverance. To disprove Satan, who maintains that humans only love God when in good fortune and prosperity, God chooses a wealthy and happy man, Job, and tests his faith by sending him a series of cataclysmic misfortunes. Job loses his livelihood, his family, is afflicted with disease, but, though embittered, ultimately maintains his faith and gains insight into the mysterious and, from the human perspective, arbitrary workings of the divine.

And seide his lyfnas bote a breth. Compare Job 7:7: “Remember that my life is but wind, and my eyes shall not return to see good things.”

- Go back to the text. You will insert an indicator after the last word of the catchword/catchphrase.
 - Type an N after the final word.
 - Style the N with the Character Style Explanatory Note Indicator, found in the XML Export Folder in the Character Style menu. This will turn it into a superscript.
 - Optional: you can add colors to indicators to make them more visually distinct. To do this, right click the character style and select a color.
 - Going forward, you can copy and paste this wherever you need a new Explanatory Note Indicator.
 - If you do copy and paste, make sure you are not adding additional spaces along with the indicator. This can sometimes happen.
- ❖ As you go through the Explanatory Notes document, you will want to make sure that the order of the explanatory notes matches the order of the indicators you are inserting into the text.
 - For print production, we order explanatory notes in numerical order according to the first number in the line range associated with the notes.
 - 19
 - 24
 - 35-70
 - 42
 - But, since we are inserting indicators at the end of the last word of a catchphrase, we need to order these notes in numerical order according to the last number in the line range associated with the notes. That way, they match up appropriately with the order of indicators
 - 19
 - 24

- 42
- 35-70
- To reorder notes, you will want to copy the entire note and paste it in its new location. Make sure you delete the old instance of the note.
- ❖ If there are multiple notes within a line range, make sure that the notes are in the same order that their indicators appear in the text.

Inserting Textual Note Indicators

The process for inserting Textual Note Indicators is the same as inserting Explanatory Note Indicators.

- ❖ Make sure you have both the text file and the Textual Note file open at the same time. You'll want to compare between the two documents.
- ❖ In the text, locate the end of the catchphrase for a note and add an indicator.
 - Type a T after the final word of the catchphrase.
 - Style the T with the Character Style Textual Note Indicator, found in the XML Export Folder in the Character Style menu. This will turn it into a superscript.
 - Optional: you can add colors to indicators to make them more visually distinct. To do this, right click the character style and select a color.
 - Going forward, you can copy and paste this wherever you need a new Textual Note Indicator.
 - If you do copy and paste, make sure you are not adding additional spaces along with the indicator. This can sometimes happen.
- ❖ As you go through the Textual Notes document, you will want to make sure that the order of the textual notes matches the order of the indicators you are inserting into the text.
 - For print production, we order textual notes in numerical order according to the first number in the line range associated with the notes.
 - 19
 - 24
 - 35-70
 - 42
 - But, since we are inserting indicators at the end of the last word of a catchphrase, we need to order these notes in numerical order according to the last number in the line range associated with the notes. That way, they match up appropriately with the order of indicators
 - 19
 - 24
 - 42

■ 35-70

- To reorder notes, you will want to copy the entire note and paste it in its new location. Make sure you delete the old instance of the note.
- ❖ If there are multiple notes within a line range, make sure that the notes are in the same order that their indicators appear in the text.

Things to look out for:

- ❖ Extra spaces when inserting indicators
 - Sometimes, if you insert indicators using the copy-and-paste method, extra spaces are added in between the word and the indicator. We always want the indicator to be right next to the word it is linked to, and right next to any other indicators that are present on the same word. Finally, make sure there is no space after the indicator if it is at the very end of a line or paragraph.
- ❖ Notes with line numbers but no catchphrase
 - Some notes do not have catchphrases, which happens occasionally (and with more frequency in our backlog). For these instances, we default to putting the indicator at the end of the text of the line.
 - Note: This means after the final word of Middle English on that line, and not after any glosses that may be on the same line.
- ❖ Notes that refer to multiple lines will require multiple indicators (and multiple notes)
 - Ex: 373, 377 *catchphrase*.
 - For these, you will need to insert an indicator in the relevant place for both line 373 and line 377.
 - Since there are now two indicators, we need two notes to match up with them. Copy and paste the note into an appropriate place in the Explanatory/Textual Notes document.
- ❖ Interrupting previous character styles
 - If the indicator comes in the middle of a phrase with a preexisting tag/character style, pause. Depending on the circumstance, the indicators may or may not need to break up the TEI.
 - We don't want to interrupt phrases that are already tagged with "Person Name," "Place," "Date," or "Title" because we want to keep that phrase together in the TEI data. If possible, move the indicator to the end of the tagged phrase. The catchphrase in the notes document should remain the same.
 - Ex. "Jesus Christ" would be marked with the Person Name style. If there was a note catchphrase of "Jesus":

◆ Correct: Jesus Christ^N

◆ Not Correct: Jesus^N Christ

- We can interrupt phrases that are already tagged with a language or a style akin to “Italic”, “Bold”, etc. It’s less important to keep together specific phrases with these styles applied.
- ❖ Notes for titles
 - If a note is attached to a title that is in the Parent Page, put the indicator at the end of the first folio number so that the title note is the first note encountered.
 - If there is no beginning folio number, then place the indicator at the end of the first word.
- ❖ Make sure the hashtag hidden character at the end of the document is flush with the last word/punctuation on the page.

Inserting Gloss Indicators

We add indicators for the glosses found in-line along the right margin of a text.

- ❖ Only Verse and Drama texts will need these indicators since they are the only text types that have marginal glosses.
 - We do not add indicators for any footnote glosses. These remain footnotes.
- ❖ As you go through this process, look for any instances of (see note) or (see t-note) phrases. These phrases should have been deleted in the first step of this process, but check for any overlooked instances.

The process of inserting gloss indicators is quite similar to explanatory and textual note indicators. The main difference is that you will need to manually match the gloss with the word that it refers to.

- ❖ Going through the text line by line, locate the Middle English word or phrase that matches up with the gloss that appears in the right margin. For help, use the Middle English Dictionary (for more, see below).
- ❖ Add an indicator.
 - Type a **G** after the final word of the catchphrase.
 - Style the G with the Character Style Gloss Indicator, found in the XML Export Folder in the Character Style menu. This will turn the letter into a superscript.
- ❖ As a reminder: glosses are separated by semicolons **only**. Make sure that you identify each gloss listed in the margin.
 - If there are multiple glosses included in the right margin, there should be an equal number of Gloss Indicators in the line of text
 - Beware! Commas often appear within glosses. Commas do not indicate separate glosses; only semicolons do.

Using the Middle English Dictionary

The Middle English Dictionary ([MED](#)) will become your new best friend as you work through adding gloss indicators. However, the MED is not always the most intuitive search engine. Begin by searching with the “Headword (with alternate spellings)” option since spelling is so variable in Middle English.

- ❖ Use typical boolean style searching methods: quotation marks around an exact phrase, etc. Helpful general intro [here](#).
- ❖ Make note of some specific Middle English grammatical conventions
 - Verbs: infinitives. Many ME infinitives end in -en, but you will typically encounter a conjugated form in the text. Try looking up an infinitive form of the verb by adding -en to the stem. This might get you closer to finding your query.
 - Common spelling shifts. METS best practices ask editors to standardize many common manuscript spelling conventions, such as the/thee, of/off, and u/v. However, other variations to look out for include:
 - Letters used interchangeably:
 - i / y / e
 - y / g / gh
 - Final endings:
 - n / nn / ne
- ❖ If you are truly stumped, use the “Modern English word equivalent” search option. This option can help, but it usually only shows the Middle English option that is closest to Modern English.

Things to look out for:

- ❖ If the gloss indicator comes in the middle of a phrase with a pre-existing character style applied, pause. We don’t want the indicators to break up the tag in the TEI. So, if possible, move the indicator to the end of the tagged phrase. The catchphrase should remain the same.
 - This is most important for the tags Person Name, Place, and Date. It helps to see where these Character Styles have already been applied, so we recommend turning them a new color.
 - Find the Character Style in the list > right click > click Edit “Style Name”
 - Select the Character Color option in the left menu box
 - Choose a color!
 - N.B. Please don’t choose yellow. It makes the text really hard to read.

- Click OK.
- ❖ Due to the nature of Middle English, glosses are not always straightforward. If you have questions about which word in the line matches up with the modern English gloss, put it in a queries list. We will send this list back to the editors to clarify.
 - Make the queries list a new Word document, saved in the XML folder, using our File Naming Conventions.
 - Be specific in recording your queries: make sure to include not only the mystery gloss in question, but also the text and line number where that gloss occurs.
- ❖ Times to query the Managing Editor:
 - Grammar with Middle English is weird and can make placing Gloss Indicators difficult. If the phrase is not straightforward, or references convoluted grammar, make a note in your queries list. With new editions going forward, we will ask editors to make it a footnote and not a gloss.

Applying the Internal Link Character Style

Finding Internal Links and applying the appropriate character style can be complicated, depending on whether you are working on a new edition or on a backlog edition.

If you are working on a new edition, use this workflow.

If you are working on a backlog edition, use this workflow.