

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

All InDesign documents are created using the same initial steps:

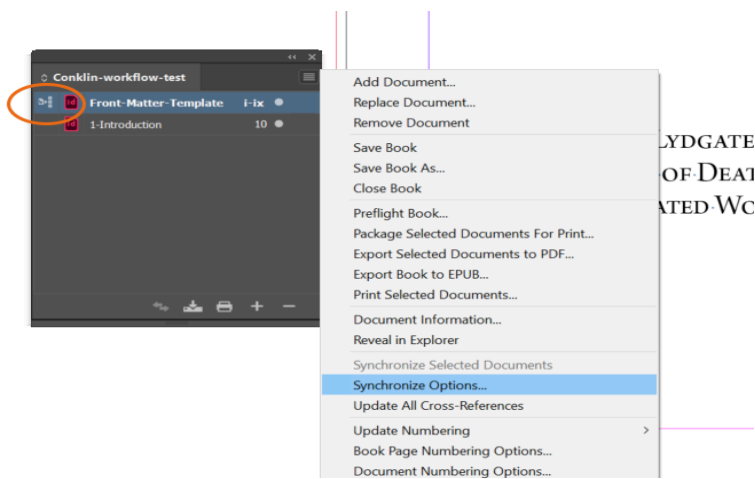
- ❖ In the InDesign launch screen, select New→ Document. OR, if you are already in an InDesign document, select File→ New → Document.
- ❖ This will open a new window where you can set options for the layout. Select **METS book**, which contains the proper layout for all of our documents. Then click **Create**.
- ❖ 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.

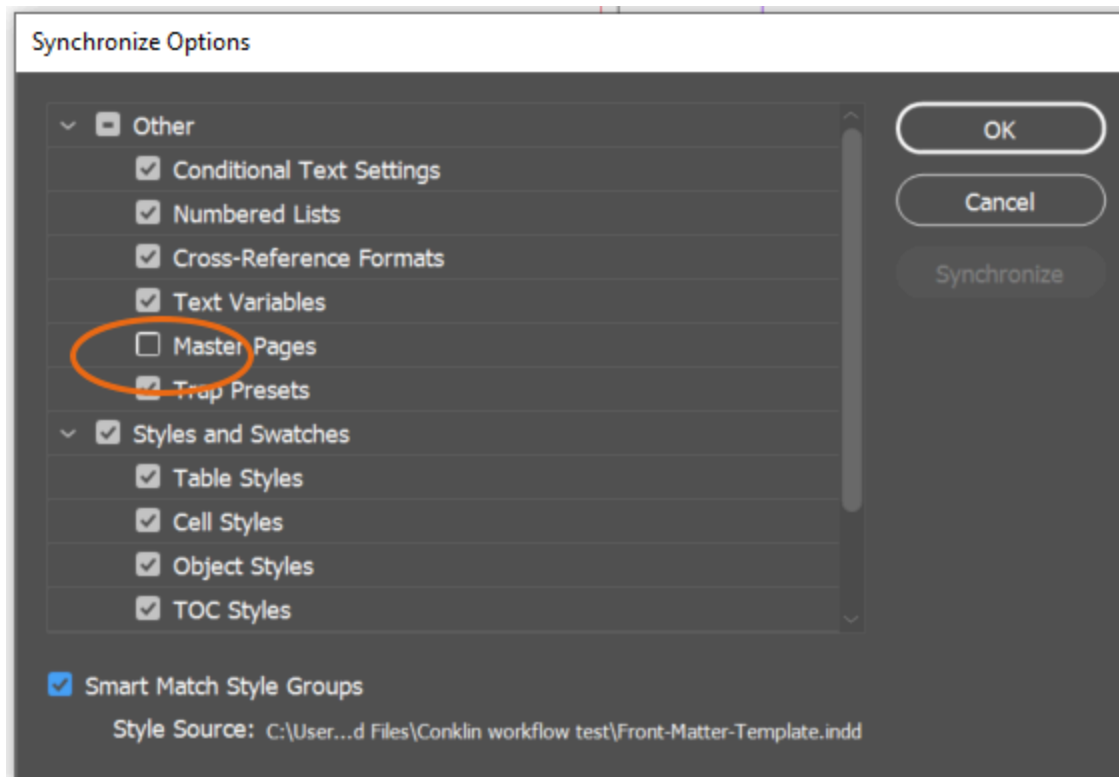
Adding new documents to a **Book**:

- ❖ 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

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.

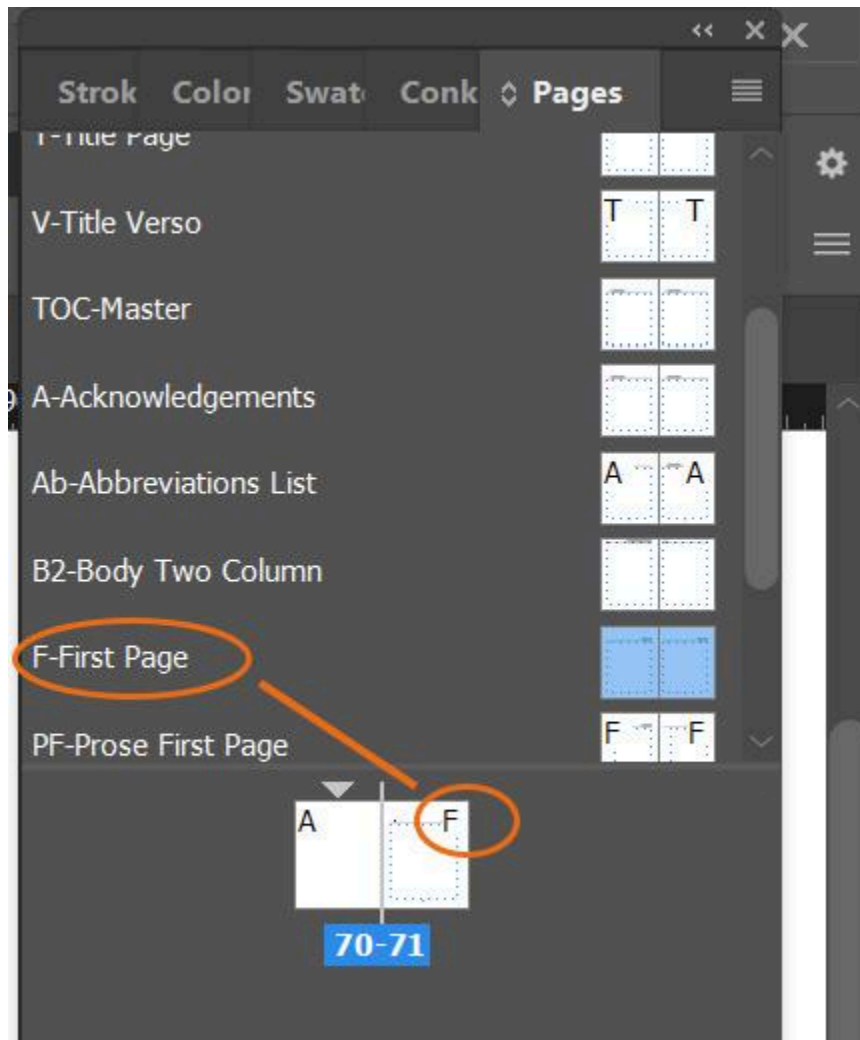
How to Insert Text from Word into InDesign

These steps are the same for most documents. **For Prose, Glossary, or Facing Page, skip to those workflows.**

First, if the editor's original text is a Word Perfect file, save it as a Word Document (the most updated version). Make a new folder in the editor's file on the network drive to hold the Word Documents.

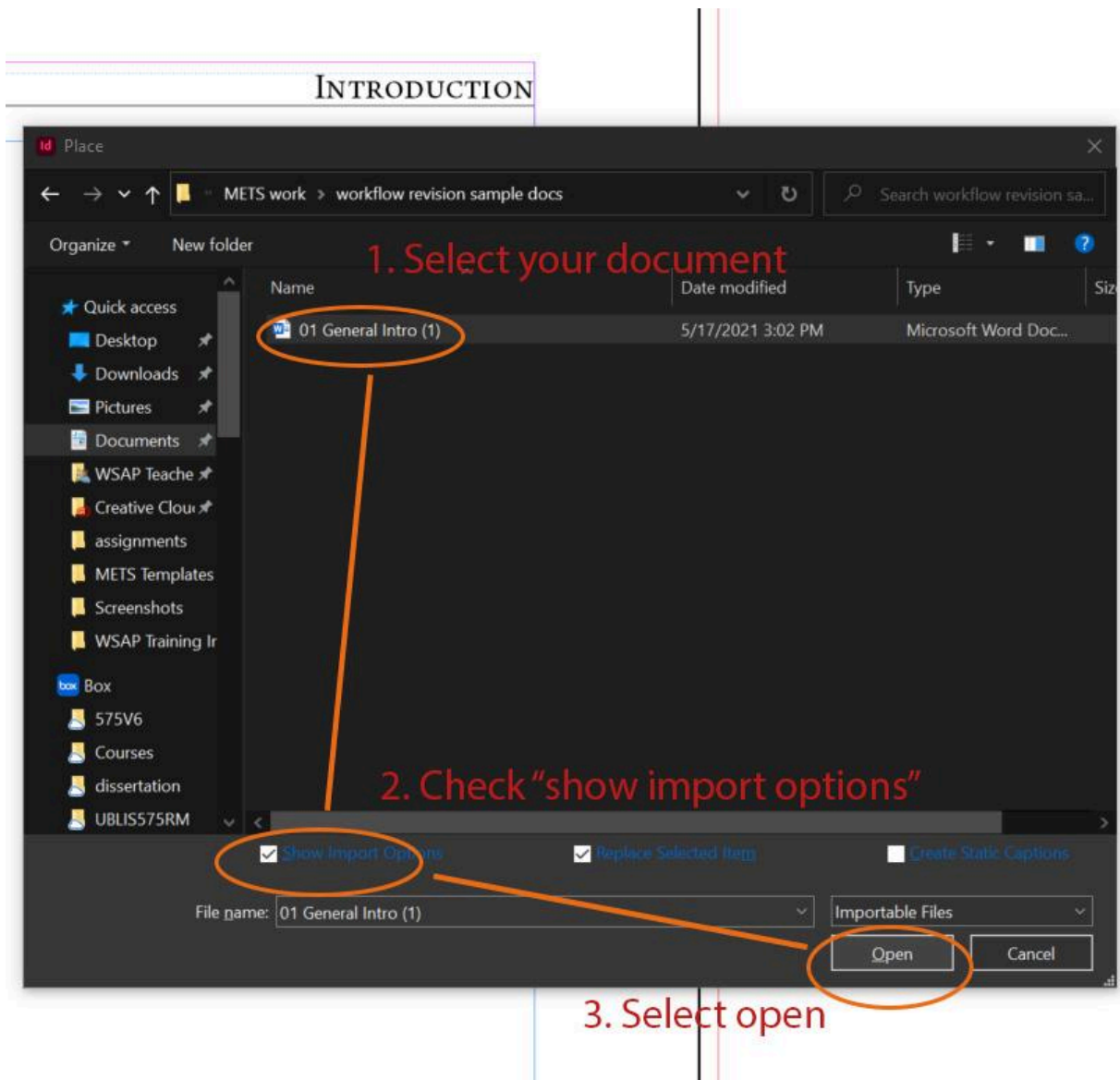
Then, in your new InDesign Document, set the **Parent Page**.

- ❖ 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 two white pages. This is your document. The **Parent Pages** are probably set to the default, which is A.
- ❖ You only need to fix the recto page, as this is the first page of your text. The verso page will remain blank.
- ❖ Click on **F-First Page** (the actual words, not the image), and drag it down to the recto page icon. **F** will appear in the upper left corner. If you're working on **Facing Page Verse**, skip to that section.



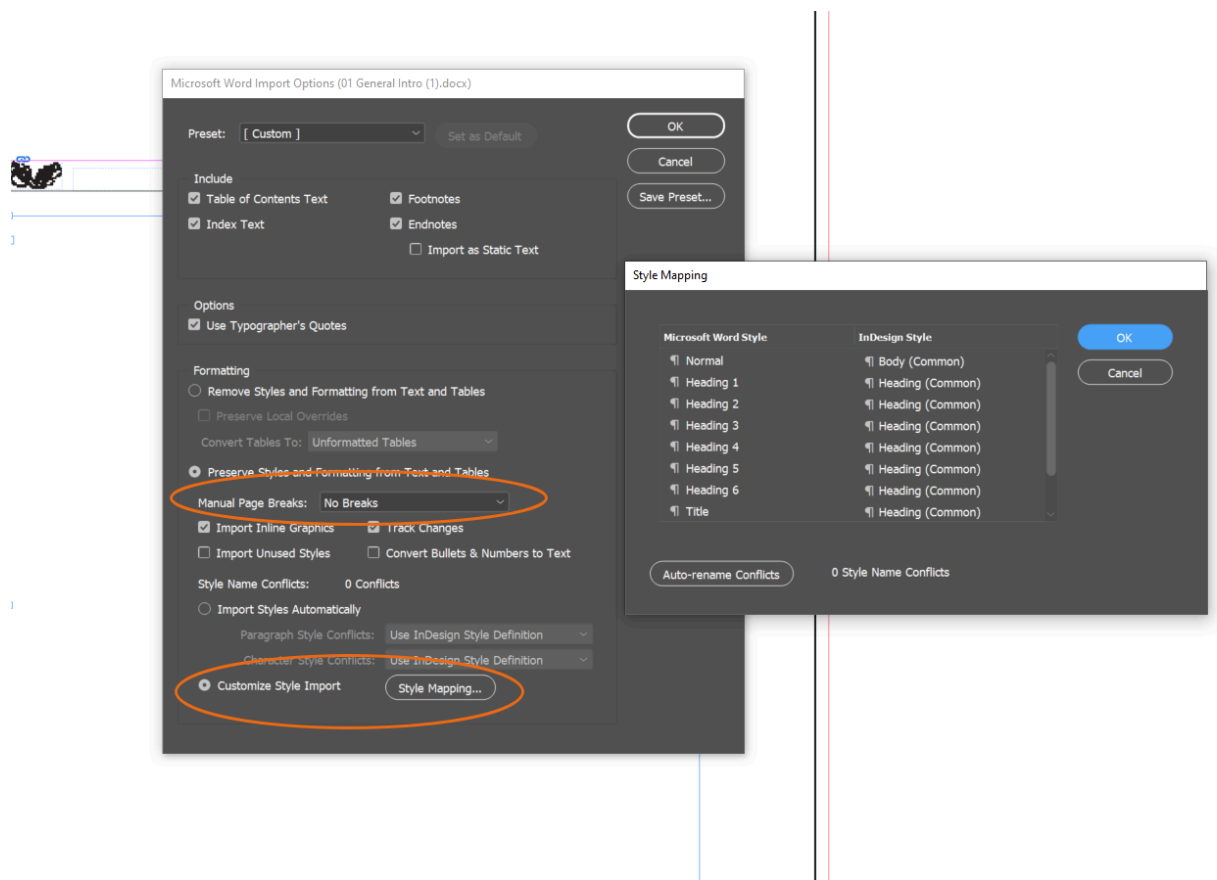
Actually inserting text:

- ❖ In the InDesign Document, ctrl-shift-click inside the text box on the page. This will make a new text box appear. You can tell because little blue squares appear in the blue 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 **open**.

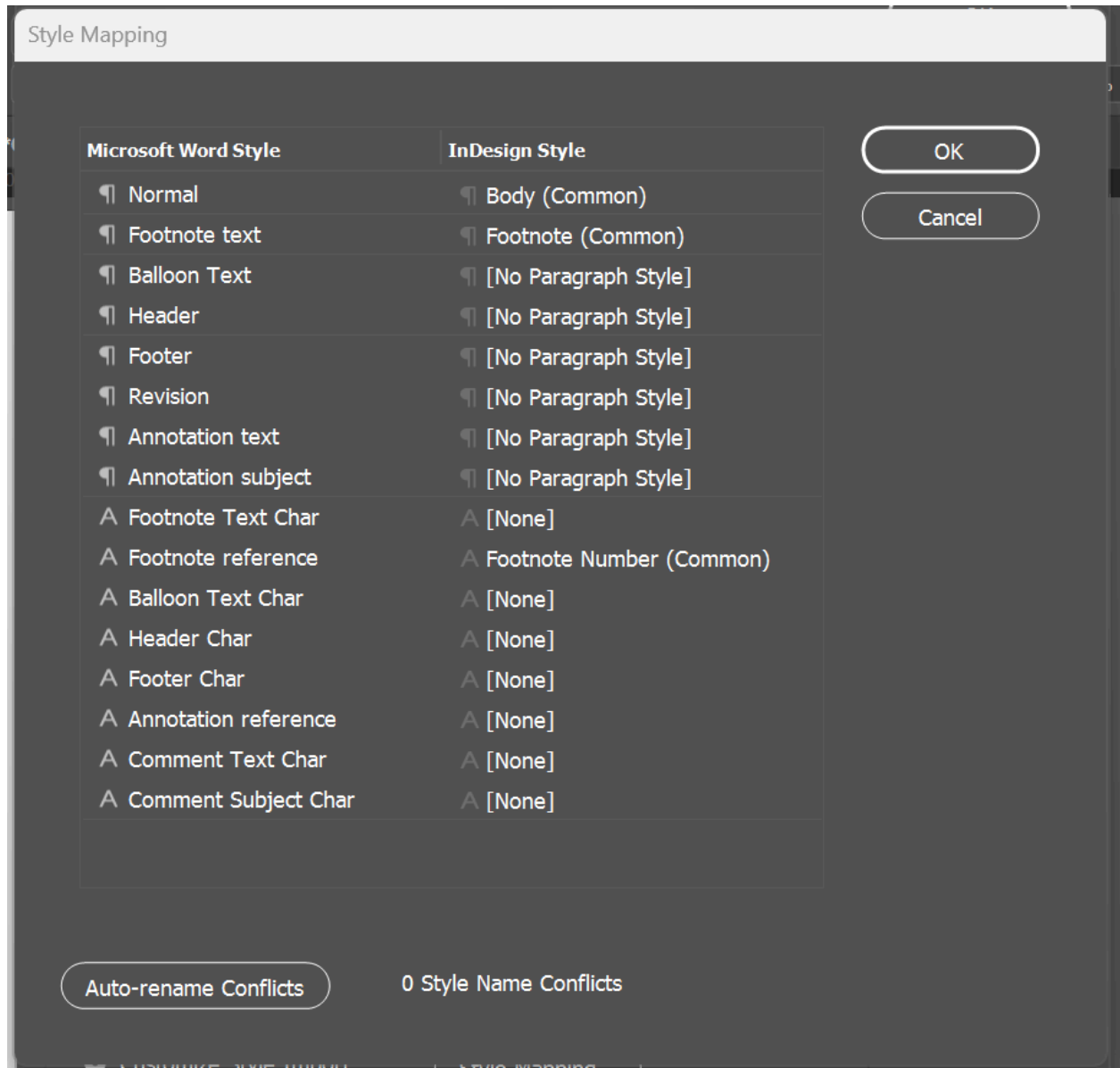


- ❖ The **Microsoft Word Import Options** box will pop up. About $\frac{2}{3}$ down the box, look for **Manual Page Breaks** and make sure that **No Breaks** is selected in the dropdown menu next to it.

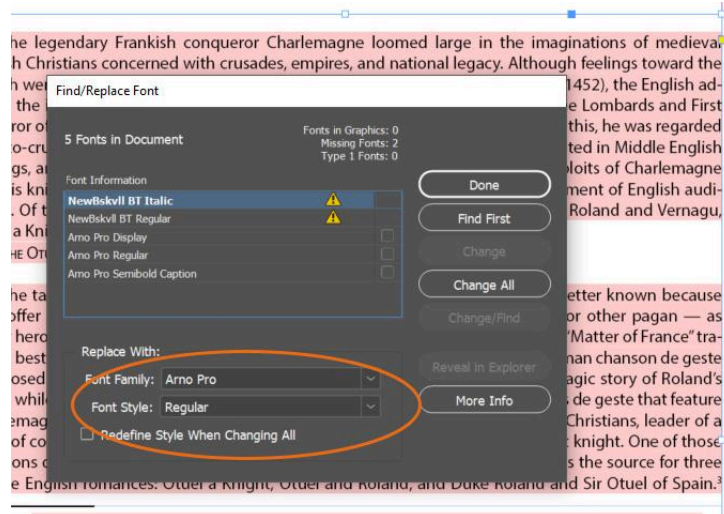
- ❖ At the bottom of the box, click **Customize Style Import** and then click the round button that appears next to it called **Style Mapping**.



- ❖ 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:
 - Normal → Line Group (Verse and Drama Template)
 - Footnote Text → Footnote (Common)
 - Poem Title → Heading (Common; this really only matters if there are headings within the poem, as you will delete the poem title)
 - Footnote Reference → Footnote Number (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.

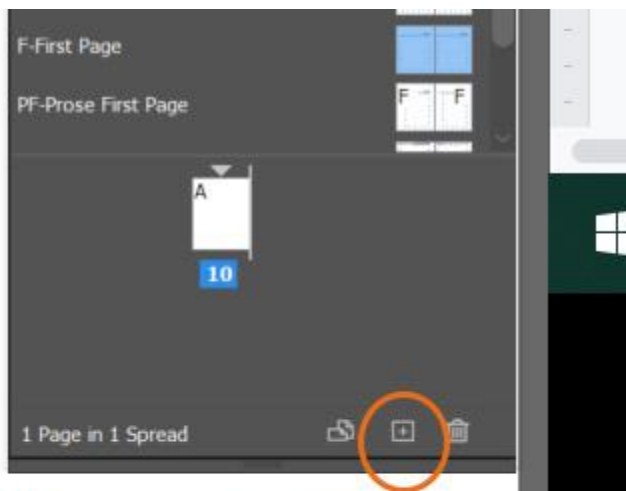


- ❖ There may be other choices, and you can use your best guess about how to remap these, but most of this will be fixed in your initial format anyway.
- ❖ Click **OK**.
- ❖ This brings you back to the **Microsoft Word Import Options** box. Click **OK**.
- ❖ This should make the text appear in the textbox on your InDesign document. It will also look horrible. Don't panic.
- ❖ You may get a message saying that there are missing fonts in the document because InDesign doesn't have New Baskerville. In the font options, choose to replace these fonts with Arno Pro. There will still be a mix of fonts but this should change some of them.



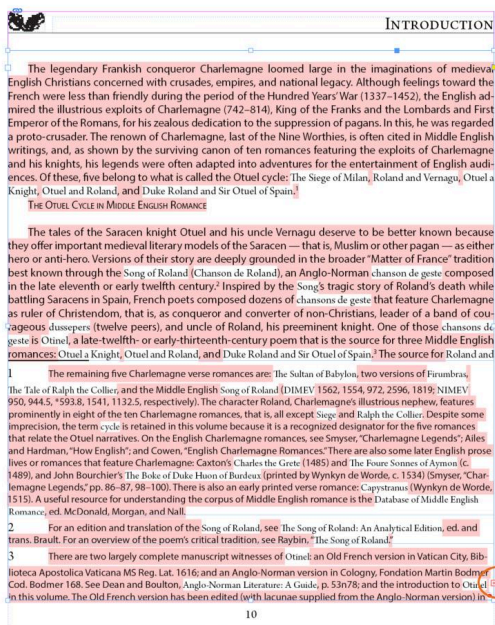
Whatever fonts show up in the list, replace with the Arno Pro font family. Our Styles always apply Arno Pro, so if you miss this step, it isn't critical.

- ❖ You need to manually insert the next page (only one). Make sure you have the Selection Tool selected (the black arrow) and click into the textbox on your InDesign document.
- ❖ 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.



Add pages to the document using this symbol.

- ❖ 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 page, set the **Parent Page** as **B-Body**.
- ❖ Make sure you are using the selection tool (black arrow on left toolbar). Pick up the overset text by clicking on the red (+) on the bottom right of the first page. Hover your mouse over the new page. Notice that it seems to be holding the faint outline of text on it. Click into the box. This will insert the rest of the text into the new page and will cause the text to roll onto as many pages as your text requires.



2. Click into this box when you've picked up your text

1. Click the (+) to pick up text