Digital Pre-Production with InDesign

A book that has been typeset in InDesign can be prepared for digital production right in InDesign. The advantage of doing digital pre-production in InDesign is that the InDesign publication itself becomes the archival form of the product, with all outputs being produced from it. It will work even for the project that has to be split up into multiple publications and combined using an InDesign book (.indb) file, such as can be done with large reference works like study Bibles. Rather than having to maintain two different and separate versions of the product, the content and production team can maintain just one, archival version, the InDesign publication, from which all outputs are created. When there are corrections, they can be made in one place, the InDesign publication, and all outputs can be updated from there. This reduces both headaches and errors and stress from the publishing process—all of which are important for the busy production team.

This chapter covers most of the techniques you need to prepare InDesign publications files for digital production. It doesn’t cover the digital production process itself—that is covered later in the chapter entitled “Ebook Production.”

## Bookmarks: Document Structure and Sequence

Every digital publication has a digital table of contents, which is separate from and not necessarily the same as the table of contents that is shown in the interior: It might either be more comprehensive or more abbreviated, for example.

It turns out that InDesign’s bookmarks functionality provides precisely what we need in order to build the digital TOC for all digital book formats. Notably:

The bookmarks can be nested, providing a multi-level digital table of contents for complex books.

* InDesign’s interactive PDF export uses the bookmarks as the digital TOC for the PDF (it “does the right thing”).
* The bookmarks can be used to build the “spine” and TOC in an EPUB production workflow.

So the process of building the digital TOC (and spine, for EPUB production) can be as simple as creating the needing bookmarks in InDesign. Then these will be picked up during the production process.

Creating the bookmarks themselves is a simple process:

Open the Bookmarks palette.

Place the cursor where you want a bookmark link to target (the location to which the bookmark will take you). If there is a heading that should be the text of the bookmark, select that heading.

In the Bookmarks palette, select “New Bookmark” (or use the keyboard shortcut that is probably listed there). It will add a new bookmark with the name of the selected heading, or with the name that you type.

You can also edit the text of the created bookmark by selecting and then clicking on the name of the bookmark (click twice slowly).

You can drag and drop the bookmarks to reorganize them. If you drop a bookmark (or group of bookmarks) onto another one, it will nest that bookmark inside the one it was dropped on.

That’s it. Just do that for every heading in the interior that you want to appear in the digital TOC. Easy! But very repetitive. Just the kind of thing that a script would be good for.

## Conditions: Print-Specific And Digital-Specific Content

In most books, some of the text is print-specific, while some other is digital-specific. InDesign’s conditional text functionality provides a very good way to have both kinds of text in the product. All you need to do is set up a condition named for each different kind of text, and apply that condition where it is used. Here is how to set up a basic set of conditions:

Open the “Conditional Text” palette (in the Window menu under “Type and Text”). (Everything in InDesign starts with opening a palette, it seems.)

Select “New Condition”. Name: “Print”. Indicator Color: pick one that you will consistently use in all your products for the “Print” condition.

Rinse and repeat for “Digital” and any others that you might want.

That will give us enough to go on.

The important thing, now, is to know what kinds of things to apply Print and Digital conditions to. Here are some things that we usually do:

On the Copyright page, we usually apply the Print condition to the print lines (those that say, e.g., “Printed in Italy” and those that have the numbers indicating which printing it is).

We also usually include on the Copyright page a “build line” with the Digital condition, which says “Build date: <Timestamp>”, where timestamp is the output date of the file (use the menus: Type > Text Variables > Insert Variable > Output Date).[[1]](#endnote-1) The build line does for digital products what the print lines do for print products: They indicate to customers when the file that they have was created. This can be very useful for fielding customer service calls.

* We usually apply the Print condition to all the text on the Title Page and link an image of the title page in its place (see below, “Images and Frames: Including Additional Content”).
* In the interior of the produce, there might be cross-references/links to other sections, such as, “see Title of Section, page NNN.” We will usually put a print condition on the page number portion of this and any punctuation that goes with it (such as the comma). We’ll also make sure that the Title of Section is a cross-reference or at least a hyperlink to the given section so that it is clickable in digital products.

There may be other places you’ll want to use Print and Digital conditional text in your products, but those are some of the most common.

Then, when creating print output, make sure that the non-print conditions are not visible by unselecting the “eye” icon in the Conditional Text palette. (We will discuss digital outputs at a later point.)

## Images and Frames: Including Additional Content

Many, if not most, books are more than just formatted text—they also include images, text boxes, and other kinds of content that are alongside the main text. At the very least, a novel will have a title page, and for digital products this title page is probably best represented as an image. It might also have a map of the fictional world, and there might be one or more cross-promotional pages at the back. All of these are best handled as images.

There are, by my count, four kinds of images and frames that need to be included in a digital product. All three of these image types can be included in the InDesign text so that they are also included in the digital output. The three types of images are:

Inline images that are anchored in the interior text

Images that are alongside the interior text

Content frames that are alongside the the main text

Textual elements that should be converted to images for digital publication

I will address each of these kinds of “extra content” in order.[[2]](#endnote-2)

### Inline images that are anchored in the interior text

Some of the images in a book are already anchored into the main interior text. For example, a figure might be included inline immediately following the paragraph that introduces it and immediately before the paragraph that explains it. Mathematical equations, chemical diagrams, and excerpts of music are examples. Or the text might contain small images within a paragraph.

In any event, if an image is anchored in the main interior text, you shouldn’t need to do anything further in order to prepare it for digital production: InDesign’s output will already include everything that should be needed for the digital production process.

That was easy. The others require a little more attention.

### Images that are alongside the interior text

Other images in a book are not in the main flow of text. If they are anchored in the text, then you’re done, as above. If they’re not anchored in the text, there is one more thing to do: Create an InDesign Note that adds an image tag into the main text.[[3]](#endnote-3)

Why an InDesign Note? Because that is really the only good place that InDesign gives us to create additional “tags” within a text in order to accommodate the specific needs of digital publishing.

The Note will contain the information needed to include the image in (non-PDF) digital outputs, without impinging at all on the layout of the print product. Here’s what you do:

Place the cursor in the text at the location where you want the image to appear in digital outputs.

Open the Notes palette (Window > Editorial > Notes) and select “New Note”.

Type the following into the note you just created:  
 <img src="relative/path/to/image.pdf"/>   
The source (src) of the image (img) is the file located at relative/path/to/image.pdf. For example, if you are keeping your images in a “Links” subfolder next to the InDesign document, and the image filename is “SmileyFace.pdf”, then the source will be "Links/SmileyFace.pdf".

Notes create a little red hourglass shape in the text when InDesign is in “Normal” Screen Mode. They have zero width, and they have no effect at all on the flow of text (unless, perhaps, they are inserted in the middle of a word, which is not really a good idea anyway).

The image Note will be exported along with the content and can be used by a digital publishing workflow to include the image at that point in the flow of the text.

### Content frames that are alongside the the main text

Sometimes there are content frames that occur alongside the main text in print, but need to be included in the main text in digital products. For example, a table might be set so that it as at the top of a page, in its own text frame with the main text flowing around it. Or a callout might be set in its own text frame between two columns in print, but needs to be inline in the ebook. In such cases, we need to do two things: First, we need tag the content in the text frame to identify it. Second, we need to indicate where to include the content in the main text. For both of these purposes we will use InDesign Notes (for the same reason we mentioned above under “Images that are alongside the interior text”: It’s the best way InDesign gives us to provide these hints to the digital production process). Here are the steps:

Place the cursor in the text frame that is outside the main flow of text, at the beginning of the content. Open the Notes palette, create a New Note, and type the following into the Note:  
 <pub:section-start id="a-unique-id-for-the-section"/>  
The unique section id should be something that you can guarantee will be unique in the entire product, it should start with a letter, and only use letters, numbers, hyphens, underscores, and periods. I recommend using something related to the content of the section: For example, if the section is Table 3.5, a good section id would be "Table.3.5".

Place the cursor in the main text at the location where the text frame should be included in digital products. Create a New Note, and type the following into the Note:   
 <pub:include id="the-same-id-that-you-created-for-the-section"/>  
For example, if the <pub:section-start/> tag was given the id "Table.3.5", then so should the <pub:include/> tag.[[4]](#endnote-4)

Having tags both in the main text and in the frame alongside it makes the connection that is needed to include the frame content in the digital product.

Doing this is only needed if the sidebar content should be included into the main text at a non-heading break. If, on the other hand, the sidebar content has a heading and is included in the digital TOC bookmarks, none of this is needed: It will be included as indicated by the position of its bookmark.

### Textual elements that should be converted to images for digital publication

The last scenario that we need to address is textual content that should be converted to images for inclusion in the digital product. In general, this is true for any combination of text and images in InDesign, and for textual elements that cannot reliably be represented as given in ebooks. A couple of common types come to mind:

Chapter numbers and dingbat characters that are set in a special font, the appearance of which is important to the “identity” of the product.

* Artwork that combines text and images on the InDesign page (rather than, say, via placing a PDF). The most common example of this is the title page.
* Foreign language text that digital platforms won’t reliably support.
* Complex tables that cannot be reflowed as lists and won’t display well as tables.

For all such situations, the solution is the same:

Create an image file representing the visual content and store it in a subfolder that is next to the InDesign publication (usually “Links” or “Images”). The best way to create an image file is to create a print PDF of the interior, extract the page that contains the visual content, and crop the PDF page to the bounding box of the visual content. Save this PDF as the image file.

Insert an <img/> tag Note that references the image file.

Put a “Print” condition on any text in the content that should not be displayed in the digital product but would be displayed without the Print condition (see above, “Conditions: Print-Specific And Digital-Specific Content”).

## Conclusion

Using the techniques outlined in this chapter, most books that have been typeset in InDesign can be prepared in this way in somewhere between an hour and a day, depending on the complexity of the book and the skill of the specialist. Long and complex projects, of course, can take much longer.

1. ## [Digital Pre-Production with InDesign](#_top)

   I suggest redefining this variable’s format (Type > Text Variables > Define > Output Date > Edit > Date Format) so that it includes both the date and the time of the output, such as: MMMM d, yyyy h:mm a z [↑](#endnote-ref-1)
2. It is also possible to deal with video and audio by similar methods to images. {TODO} [↑](#endnote-ref-2)
3. Making use of this Note requires an export process that recognizes it. {TODO} [↑](#endnote-ref-3)
4. You might wonder why we have included the pub: prefix in the <pub:include/> and <pub:section-start/> tags. The reason is that, while the <img/> tag is defined in HTML and is the default, the other tags are not in HTML but in the Publishing XML namespace, represented by “pub:”. See <http://publishingxml.org> for more information. [↑](#endnote-ref-4)