Typesetting with InDesign

## Styles, Not Overrides

It is probably stating the obvious to say that typesetting should use paragraph and character styles to format books. After all, everyone uses styles, right? Well, yes, except for when they don’t. The reality is that there are many situations in which what InDesign calls “overrides”—or, local formatting—is tempting. It’s so easy just to apply some adjustments to the formatting and be done with it.

## Dynamic Endnotes

InDesign has no built-in support for endnotes. This can be explained in various ways, beginning with its roots in magazine publishing, where endnotes don’t really appear. But that explanation wears thin now that InDesign is 17 years old—almost an adult!—and has become the primary page layout system for the entire publishing industry. But, still, no endnotes. So another explanation is needed. Such as complexity? That seems hard to believe, since Microsoft Word and every other word processor has supported endnotes for 30 years. But, no endnotes. So we’re left with laziness, incompetence, tone-deafness to the needs of book publishers (who strongly favor endnotes over footnotes), and/or uncaring.

Be that as it may, we need to support endnotes in our books. It turns out that there is a relatively easy way to do it, even with InDesign’s built-in Word import.

Procedure for Creating Dynamic Endnotes in InDesign from a Placed Word Document

1. Place the Word document, making sure that the “Include: Endnotes” option is checked and that all styles and formatting are preserved. This will result in the endnotes being placed at the end of the story for this document, with the endnotes styled with the “Endnote text” paragraph style, and the endnote reference numbers in the text being styled with the “Endnote reference” character style.
2. Delete the endnote reference numbers from the beginnings of the endnote paragraphs, and the double-spaces from between the endnote paragraphs.
3. Open the “Style Options” for the “Endnote text” paragraph style, go to “Bullets and Numbering.” List Type: Numbered. Format: choose the kind of numbering you want: Arabic, Roman, etc. Number: match what you want—probably ^#^t. Character Style: Endnote reference. Mode: Continue from Previous. Now all of your endnotes will be auto-numbered.

If you have several chapters of Endnotes, all numbered from 1 within each chapter, you will need to add a new style: “Endnote First”. Set all of the numbering options as above, but for the “Mode:” choose “Start At” with 1. Then apply this style to the first endnote in every chapter.

1. Search through the document for all endnote references. In the search dialog, the search text should be blank, while for the “Find Format” you should choose the character style “Endnote reference.” With each endnote reference selected, open the cross-references palette and select “Insert Cross-Reference”. Link to: Paragraph. Destination: Endnote text, and select the endnote that is your destination. Cross-Reference Format: Paragraph Number

When you have gone through this process, all of the endnotes will be automatically numbered both in the text and in the back matter. If the author or editor later adds a note, all the numbers will reflow without great pain. Also, if you create an interactive digital PDF, the endnote references in the body will become links to the endnotes (unfortunately, the reverse is not true). And in the ebook export process that we have developed, these links are bidirectional.

It’s not a perfect process—certainly not as easy as creating the endnotes in Word in the first place—but it gets the job done.[[1]](#endnote-1)

## Automated Tables of Contents with Bi-Directional Linking

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   At some point I should and probably will create a script to do all of this work automatically, so that after placing a Word document users can run the script and have nicely automated endnotes. Or, you could write such a script and contribute it to the bookgenesis project at <http://bookgenesis.org>. [↑](#endnote-ref-1)