



Notes for Preparing InDesign Files

1. Use a recent file from the relevant series as a template.
2. If necessary, install the fonts you'll need. You can download them from Adobe or find them in a previous package folder for another book.
3. Save the file with a new name (usually "[Book Name] interior").
4. Place the manuscript file. When you open the place dialog box, click the "view import options" box. In the Import Options dialog box (this assumes you are using Microsoft Word as the file source), do the following:
 - a. Select the checkboxes for Table of Contents Text, Index Text, Footnotes, Endnotes, and Typographers Quotes.
 - b. Choose the Preserve Styles and Formatting from Text and Tables option.
 - c. Choose the Customize Style Import option.
 - d. Map the incoming styles to the styles in the template file.
5. Place the document using autoflow. This requires you to hold down the shift key as you place the text. This creates enough new pages to handle all of the text.
6. Take care of the front matter. This will require you to do the following:
 - a. Insert the title and authors or editors.
 - b. Check for any updates to the series editors and associate editors.
 - c. Add to the "Other books in the series" section.
 - d. Update the copyright info on the publication page.
 - e. Add the ISBNs and DOI to the publication page.
 - f. Check the copyeditor.
 - g. Add info about cover art, if used.
 - h. Double check the series editors and associate editors.
 - i. Check the press info, adding or removing schools from the UPC consortium as appropriate.
 - j. Add the land acknowledgment link to the bottom of the page. The typical text is "**Land Acknowledgment.** The Colorado State University Land Acknowledgment can be found at <https://landacknowledgment.colostate.edu>."
7. Begin working through the document.
 - a. Use the find and replace tool to address any stray formatting that Word brought in. Use the Control-F command to open the Find and Replace dialog box. Set the scope of the replace operation to the Document. Use the styles and formatting options to specify the changes you want to make.
 - b. Do not, under any circumstance, replace a space and paragraph break. This will cause the styles to ripple down (from one paragraph to the next) and can end up creating all sorts of extra work for you.
8. Work through the document, placing figures and ensuring that the headings are properly formatted. Pay attention to the following issues in particular:
 - a. Check for any problems with reference lists and paragraph text.

- Check reference lists to ensure that URLs don't break at http:// (insert a soft return before them instead – shift/return)
 - Search, in APA reference lists, for improper use of colons (i.e., search for (1): with a filter for Reference List style).
- b. Check bulleted lists and numbered lists. Use the Context menu or Type menu to ensure that numbered lists restart at 1 as appropriate.
 - c. Check line spacing and indents. Use overrides for local problems. Redefine the styles if necessary.
9. Be sure that References come before Appendices.
 10. Ensure that all footnote reference numbers are formatted properly. Do not setup sections at this time, since the page layout will change after the first proofs.
 11. Ensure that all parts and chapters begin on an odd-numbered page (the right side of a spread). Use the menu command Type > Insert Break Character > Odd Page Break to set this up so that it works even if the pagination changes.
 12. Set up the PDF and ePub export options. Go to the Paragraph Styles box, click on the quick arrow (on the right side of the dialogue box), and choose Edit All Export Tags.
 - a. In the ePub and HTML section, select the split document option for chapter titles, section titles, and any front matter styles (e.g., Front Matter: Front Matter Header, Front Matter: Series Title, Front Matter: Dedication) you want to use.
 - b. Assign headings to various styles, such as Book Title (h1), Section Title (h2), Chapter Title (h2 or h3, depending on whether there are sections). Set headings for headings A, B, C, and D. Set front matter headings at the h2 level.
 - c. Assign HTML5 tags to the following styles. You can do this by highlighting “automatic” and typing in the tag.
 - Figure: figure
 - Figure Caption: figcaption
 - Block Quotation Styles (all of them): blockquote
 - Section Break: hr
 - Emphasis: em
 - Citation: cite
 - Strong: strong
 13. Set up the style settings in the same way the same for the PDF section. You will not be able, however, to carry out step C above.
 14. Generate a PDF file and send off the first page proofs. Use the email template to provide instructions to the authors/editors. Be sure to copy the series editors.

Preparing the Second Proof

1. When you receive the corrections, work through them.
2. Work from the beginning of the book to the end, setting pages up properly so that the facing pages align.
3. Add Alt tags to all images in the book.
4. Review the structure of the book (in Paragraph Styles and then in the options menu in the upper right of that flyout). Set any changes for the PDF and ePub/HTML sections. If the book does not have

sections, you'll want to make sure that the chapter titles are at an H2 level. Check the ePub document for any style mappings that might be needed.

5. Edit the parent pages that are used to show the headings and page numbers in the book. These are built into the template. Here's what they do:
 - a. Master Blank: no page numbers and no headers. Used for blank pages before chapters and parts.
 - b. Master – Page Numbers Bottom: shows page numbers, but does not show a header. Used for the first page of a chapter or for a Part page.
 - c. Master – Page Numbers Bottom & DOI: This is used for edited collections. You'll need to update the hyperlink in the DOI. The default is the DOI plus 02.01 (showing part 2 and the first chapter). This will be updated for each chapter. Use Ctrl – Shift – Click to make it editable. Update the chapter number (or other part, following the DOI scheme). Update the link.
 - d. 1 – Chapter Name: there are lots of these. Open them, edit the author names and the brief title. Be sure to paste text using the Ctrl – Alt commands, which apply the text without formatting.
6. Assign Master Pages to the various sections/parts/chapters of the book. To apply the Master Pages, right click on them and choose the “apply to pages” option, or drop them on a page icon in the Pages flyout.
7. Ensure that page numbering is working as it should. Roman numerals are used for front matter. Arabic numerals begin with the introduction, foreword, first part, or first chapter.
8. Ensure that the facing pages are even at the bottom of the page. The “keep options” generally work against having a single line of text in a paragraph showing at the top or bottom of a page. You can override this, but it's usually best to find a way to shorten another paragraph by a line. You can do this through the Tracking Control in the bar at the top of the InDesign window. Consider both decreasing and increasing tracking, but generally try not to go above 20 or below -20. It's fine to have the lines on a page be one or even two shorter than the maximum number of lines possible, but generally you can find a way to make things fit.
9. Convert URLs automatically; then check for and create URLs beginning with https://; then check for and create URLs beginning with http://. For some reason, InDesign doesn't find them. Go figure.
10. If appropriate, generate the index.
11. Generate your TOC, assigning the styles in the template as appropriate.
12. Add structure to the document, using the PDF settings. Book titles are h1, sections are h2, chapters are h3, headings A, B, and C are h4, h5, and h6. Series title is h2. Contents, if it's a separate style, is h2.

Creating a Cover

1. Create the cover. Choose the image from the set that we've downloaded for the series. For example, the Perspectives on Writing images come from <http://www.sxc.hu/photo> and are saved in the Cover Images folder in the Perspectives on Writing folder. Create the cover (600 dpi images, CMYK Tiff). Set up the colors needed for the back cover and fonts. Then add the other images, such as the WAC Clearinghouse and UPC logos, as appropriate. You can change the colors in Illustrator.
2. Export the cover files as Cover-Front.pdf and Cover-Back.pdf. Insert these into the full book when you create the PDF. Use the Cover-Front.pdf as the first page in ePubs.

Quality Checks

- Check title and author name(s) (cover/jacket, title, half-title, copyright pages)
- Updated series information
- Copyright holder, CIP data
- DOI placement on copyright page (below ISBNs)
- Search text for misplaced straight quotes (~" , ~' in GREP)
- GREP search for [br]ack(et)ed bad breaks: `[\\(?!\\)(\\w+)[\\)?\\]](\\w+)`
- Review for unstyled character/paragraph styles
- Page numbers: position, size, spacing
- Page numbers TOC / List of Illustrations, Maps, Tables
- Running heads: position, size, spacing
- Confirm DOIs: UPC/USUP prefix, forward slash, ebook ISBN, chapter number
- Check for special spacing/capitalization/indentation on initial paragraphs on display pages
- Check for special characters
- Image quality
- Color images = CMYK, duotones = EPS format
- Spellcheck cover/jacket
- Check jacket for series logo
- Index included
- Credit for cover art on copyright page
- Credit for author photo
- Match list of contributors/back cover to TOC authors
- Check website footer with final page count, figures, bibliographies, indices
- Baselines even on facing pages
- Check every page for anything funny-looking