

Contents

Introduction	2
How Indesign organises your work	3
Creating documents and books	4
Adding content to documents	6
Applying styles to documents and books	9
Adding images	11
Publishing your ePub	12
What next?	14
Conclusion	15
References & Resources	16

Introduction

InDesign is a fantastically powerful tool for generating and organising publishing output that is completely wasted on ePUB development. This is because the essential premise of an eBook is that the layout is fluid and controlled by the user and the device, not the publisher.

Having said that, InDesign has its benefits, particularly when dealing with extensively text documents, ie the more traditional book or longer format document. This article covers some of the basic skills uncovered when toying with this powerful application. It is by no means an Indesign user guide, but enough to get you publishing.

Which version?

This document, and my InDesign efforts, have centred on CS5. ePUB support has been available since CS3 but most reviews state it only got serious from CS4.

Since this article is only about the basics of InDesign it should be applicable to both CS4 and CS5.

How Indesign organises your work

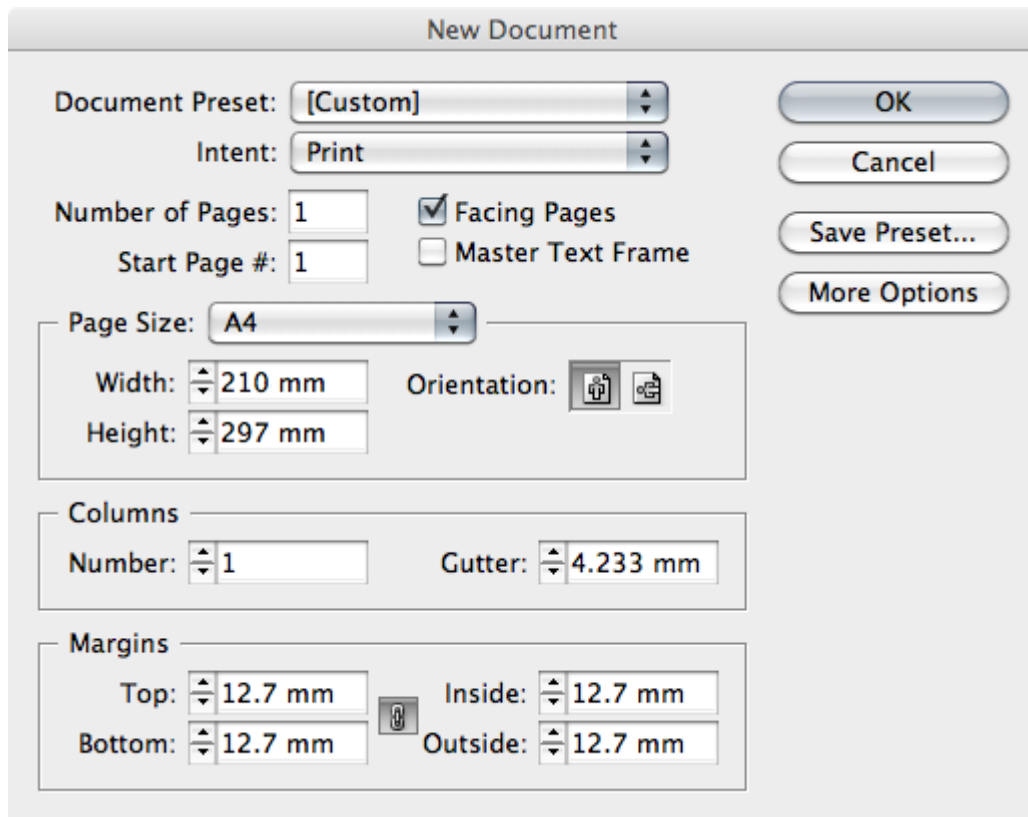
The basic building block in Indesign is a document. Each time you create one you specify the page layout, then add your content (and extra pages as needed). You can then publish in all formats, including ePUB.

Optionally you can collect documents into a single book. In each book you specify the order that documents present in, and choose which document contains the “master” styles to be enforced across all the other documents. Indesign takes care of applying those styles, making sure page numbers run across all documents, etc.

For ePUBs you can publish from inDesign at the document or book level. So there’s no real reason to go the book route (what do you care about running page numbers?). The only real benefit is if you publish a book as an ePUB you get a table of contents that matches the document set it contains. Plus, if your content is long, it does give you more manageable chunks to work with.

Creating documents and books

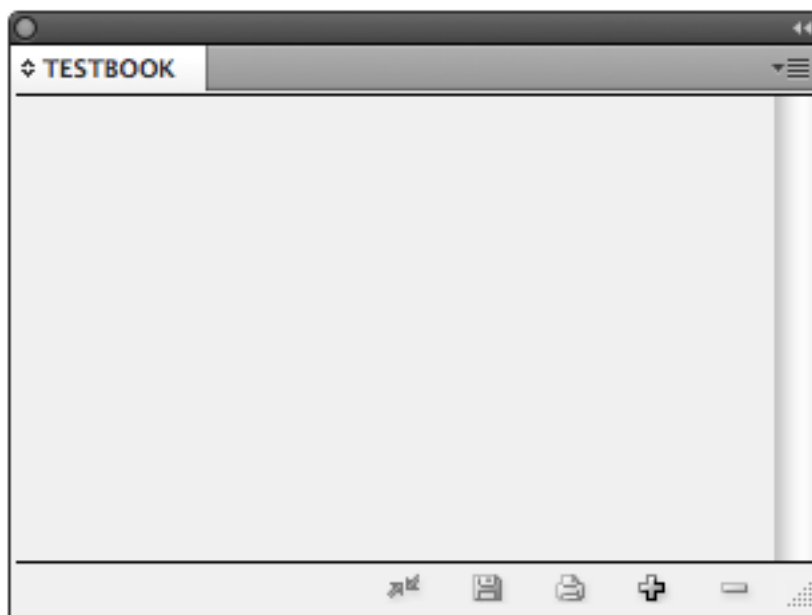
To create a document, simply select File > New > Document. You'll then get a dialog that has little bearing on any aspect of ePUB development:



As a result I recommend you ignore most if it. Pick an A4 or A5 page layout for print so you just get some room to work without too many page breaks.

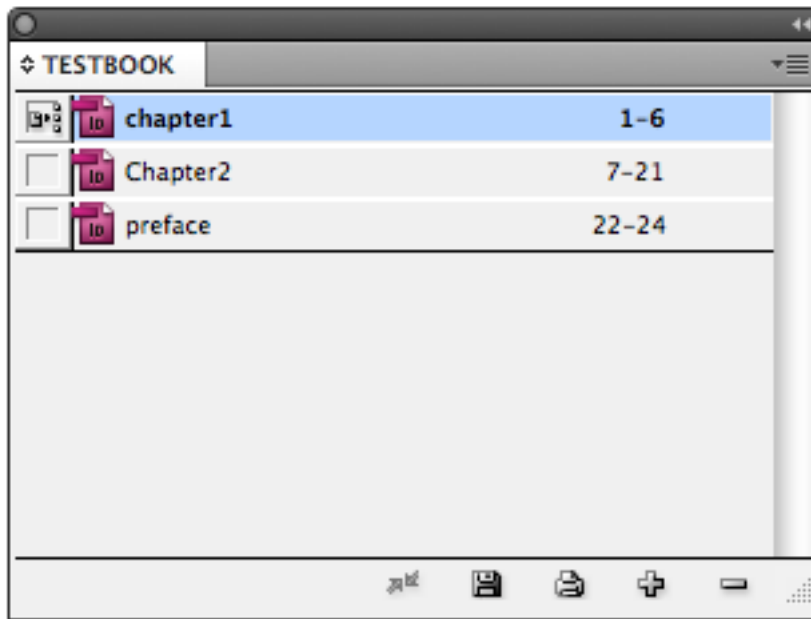
To create a book, select File > New > Book. And then choose where to save it.

Once saved, what you've got is an empty book.



To populate your book you then add your documents. In the book panel, click the plus (+) button. Then select the document(s) you want to include in your book. Once selected they'll

be listed in the order added; you can drag and drop to set the required order.



The book panel will list all the documents in your book, and will automatically calculate the page numbers across all the content. It also shows (by small icon on LHS) which document is picked as the master for your styles: more on that later.

Adding content to documents

Indesign gives you an extensive toolbar to add and manipulate content. However if working mainly with text we only need a few. And the real technique (and power of Indesign) is being able to add multiple pages of content in one go.

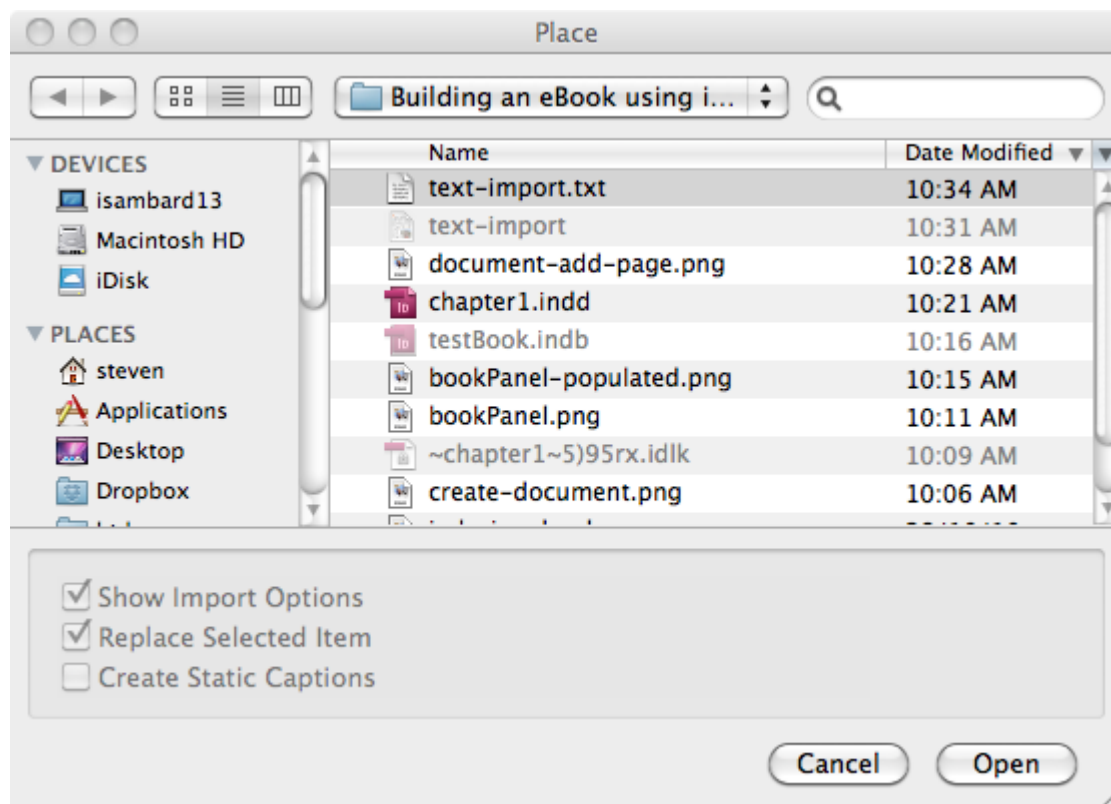
Now there is probably a better way to do this, but this worked for me.

(1) Save your required content into a text file. It's easy to export most documents into text.

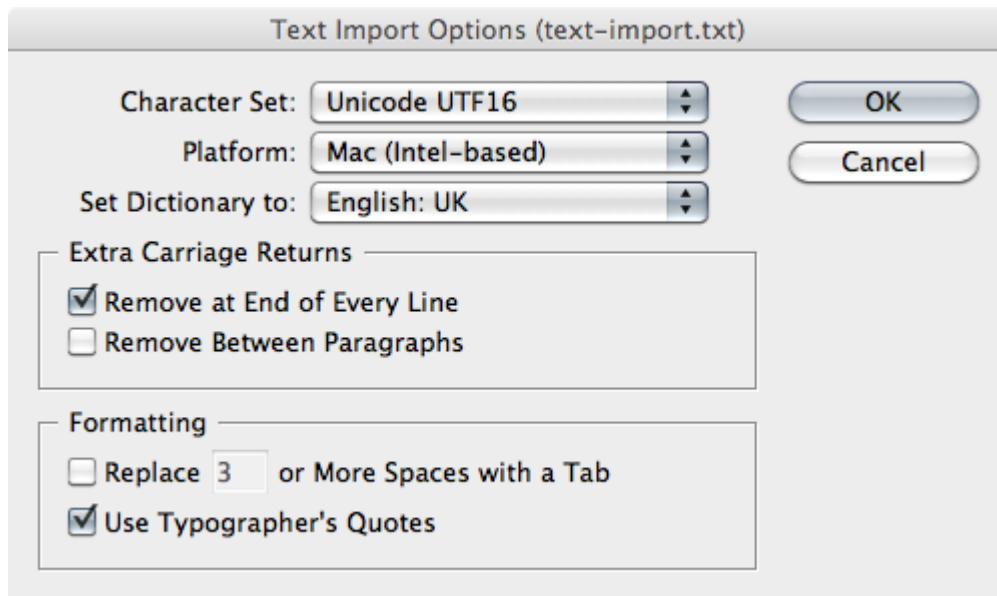
(2) Open the document that the content is to be included in.

(3) Select File > Place

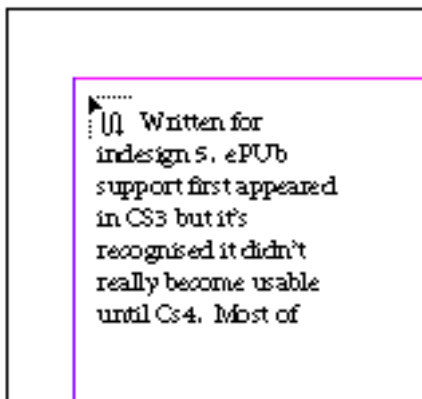
(4) In the dialog that appears, select your file, but make sure you have selected the Show Import Options checkbox.



(5) In the Import options checkbox, make sure you pick options for extra carriage returns that match the format of your text import. By default I'd always choose to remove returns at end of every line. Also check the encoding matches the original.



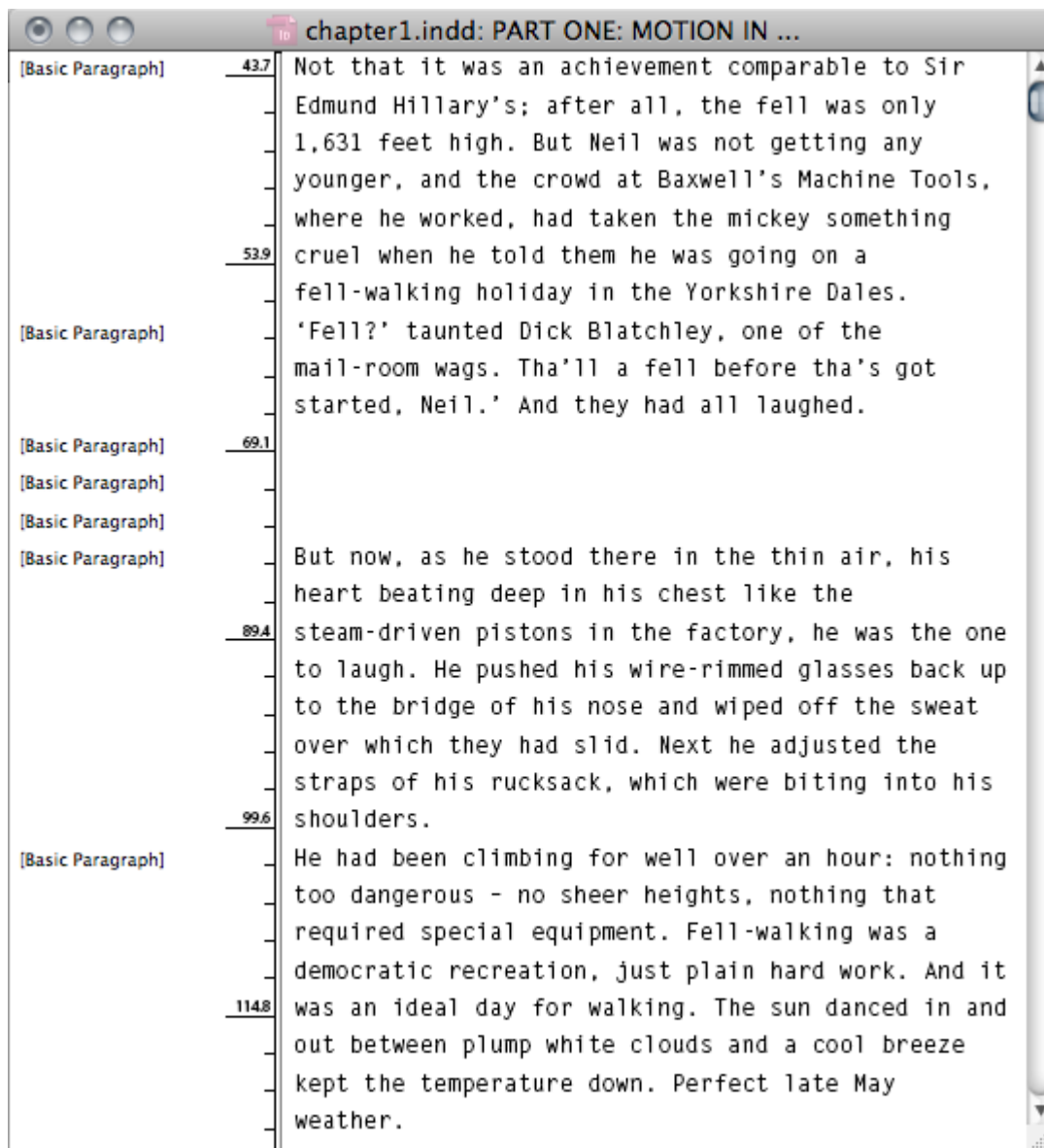
(6) Click OK to import your content. You'll get a floating cursor thingie you can use to drop your content into your document. Now here's the clever part: press and hold Shift and then click in the top left corner of your page.



Clicking normally creates a text frame on the current page and puts your content into it. But if you press Shift first the icon turns to that snake thing above, and then InDesign will not only create the current page, but will create as many pages are needed to present all your content.

Story Editor

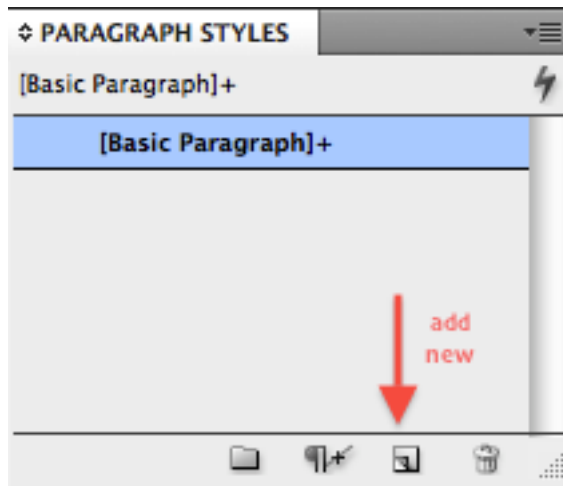
If you need to quickly review your content then use the Story Editor (Edit > Edit in Story Editor). This gives a plain text view of all your content, allowing you to quickly scroll and edit without being distracted by styles and page breaks.



This is an excellent tool for fixing up unwanted paragraph breaks, repeated footer text included in the body, etc. You can also use it as a quick way to run through content and apply styles - which we'll describe next.

Applying styles to documents and books

By default all your content will come in as “Basic Paragraph” style. You can view the available styles in the Paragraph Styles pane (if not visible choose Window > Styles > Paragraph Styles).

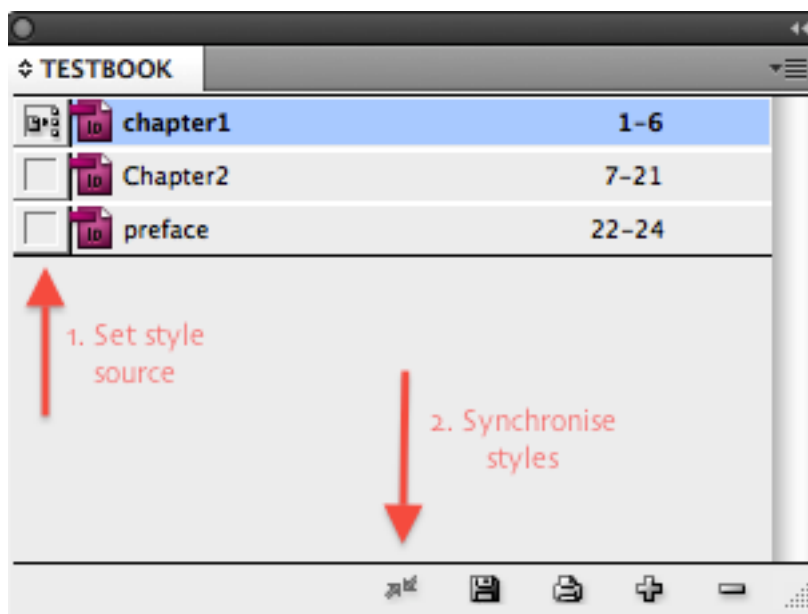


To add a style click the small add icon at the bottom of the pane. You'll then get an extensive dialog to tweak to your heart's content. InDesign does a decent job of converting your request to CSS when exporting the ePUB; just avoid settings around pagination (eg “start on next odd page”) as these are meaningless in electronic land.

To apply a defined style to content simply click your cursor in the paragraph and then select the required style from the list. You can do this in both the document window and the story editor window.

If using a book, setup all your required styles in one document. And then use the book features to apply those same styles across all documents in the book.

1. In the book panel ensure the document with the required/master styles is selected as the style source. It should have the boxy icon appearing in the left column in the book pane.
2. Click the synchronise button (looks like two arrows attacking each other) at the bottom of the book pane.



Once synchronised, all the styles in your master document will now be updated in the current document. You can then apply them to your content. If already applied and you've made changes to the style, those changes will be automatically applied.

What about character styles?

This topic has spoken mainly of paragraph styles as that is what your ePUB will predominantly consist of. Although even saying that I've yet to push much beyond half a dozen different styles.

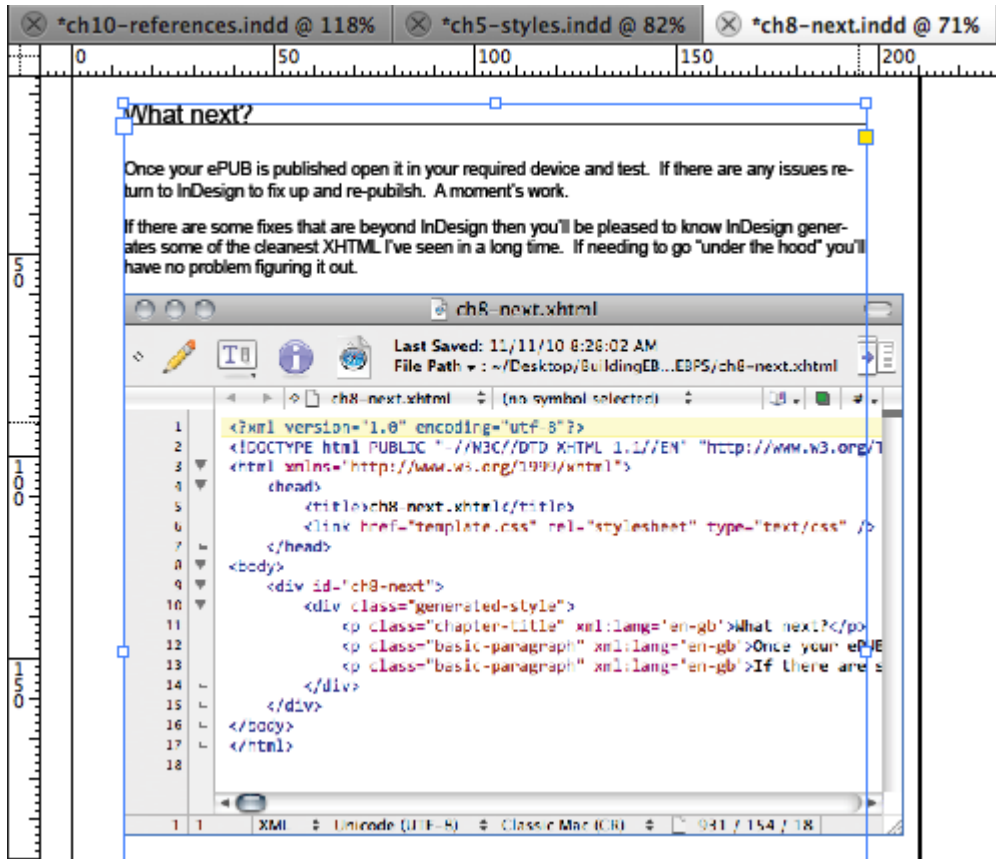
Character styles work in exactly the same manner as paragraph styles, just with a few different configuration options. With characters the default style is "None". Add/update additional styles beyond that within the character styles pane (Window > Styles > Character Styles).

Adding images

To add an image to a document you use the same Place menu option as for adding text. The important point, however is to add the image within your text, not in a floating frame.

To add an image inline simply place your cursor where you want the image to appear (be thinking location in text - after this paragraph - not location on page).

Then choose File > Place and locate your image:



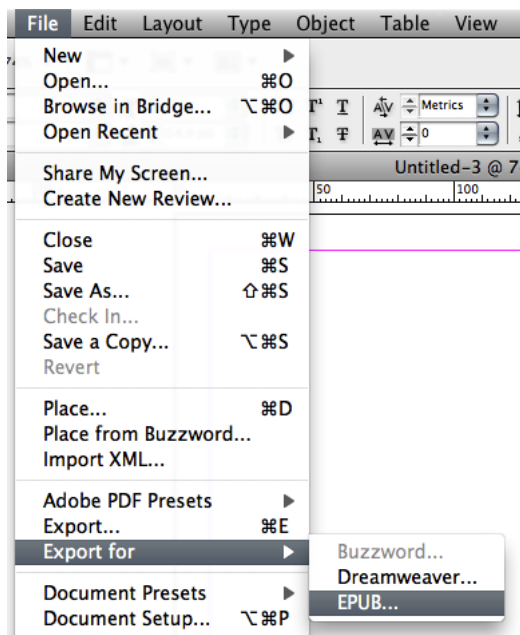
Once placed you may have to resize to make it fit: Choose Object > Transform > Scale from the menu.

Image formats

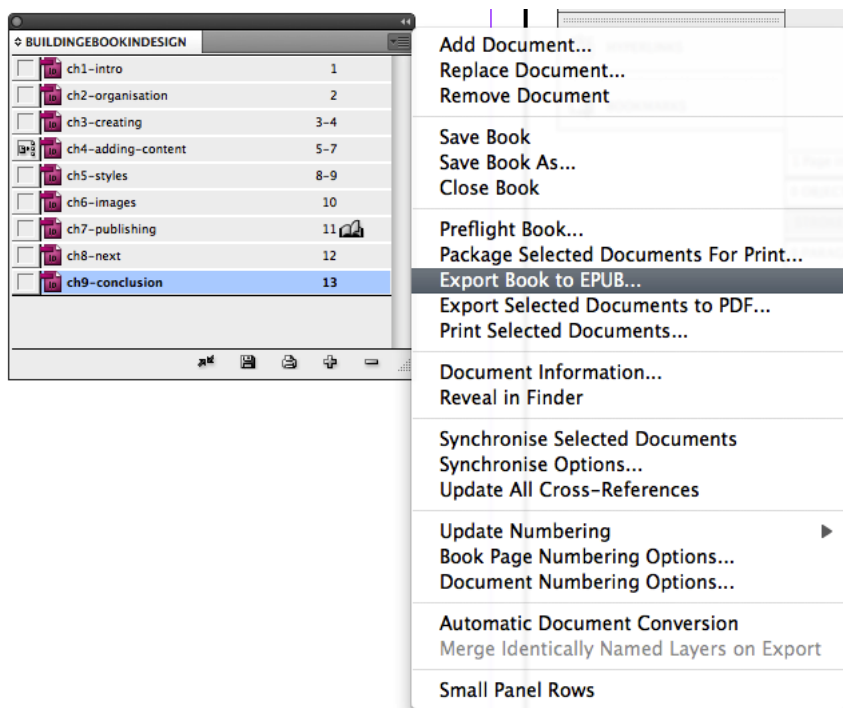
Since ePUBs are essentially web pages, use images in the standard web formats (GIF, JPG, PNG, SVG). I'm sure InDesign can manage converting other formats but why bother if you can do the appropriate conversion beforehand.

Publishing your ePub

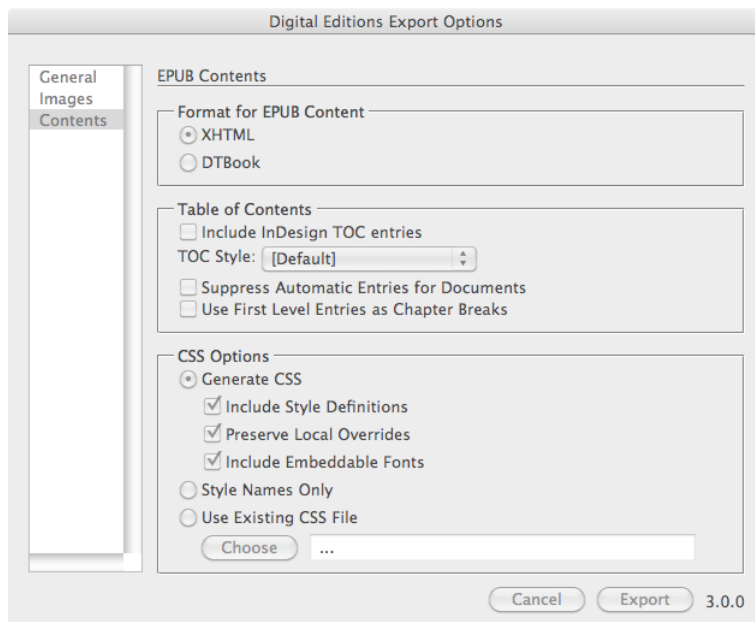
To publish a document as an ePub select File > Export for ePub:



To publish a book as an ePub select Export Book to ePub from the book panel menu:



Once selected you get a standard dialog, and most of the options you can leave with their current defaults.



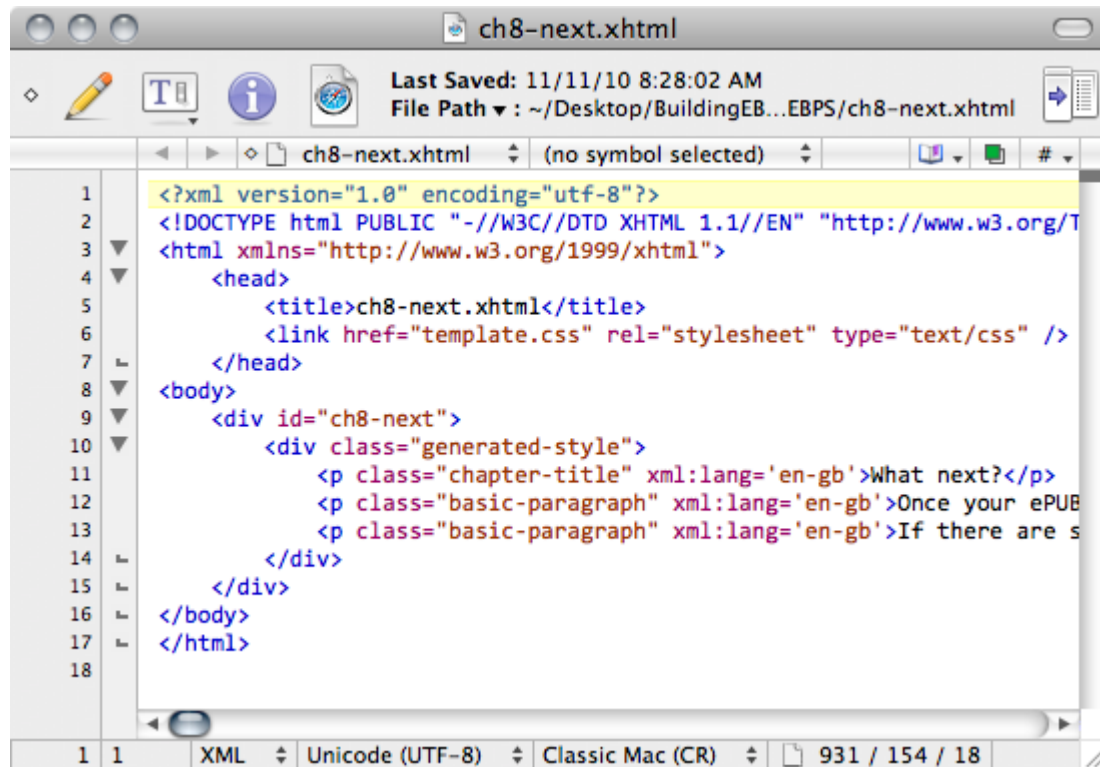
The only item to check is the format (use XHTML).

If you make it of the advanced class then use the options for CSS to allow you to apply the same styles across multiple books. And there looks like some option for having a single document generate multiple chapters in your eBook. Again. put that in the advanced course.

What next?

Once your ePUB is published open it in your required device and test. If there are any issues return to InDesign to fix up and re-pubish. A moment's work.

If there are some fixes that are beyond InDesign then you'll be pleased to know InDesign generates some of the cleanest XHTML I've seen in a long time. If needing to go "under the hood" you'll have no problem figuring it out.



The screenshot shows a text editor window titled 'ch8-next.xhtml'. The window's title bar includes the text 'ch8-next.xhtml' and a standard macOS window control set. Below the title bar, there is a toolbar with icons for a pencil, a text tool, an information icon, and a document icon. The main text area contains the following XHTML code:

```
1 <?xml version="1.0" encoding="utf-8"?>
2 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.1//EN" "http://www.w3.org/T
3 <html xmlns="http://www.w3.org/1999/xhtml">
4   <head>
5     <title>ch8-next.xhtml</title>
6     <link href="template.css" rel="stylesheet" type="text/css" />
7   </head>
8   <body>
9     <div id="ch8-next">
10      <div class="generated-style">
11        <p class="chapter-title" xml:lang='en-gb'>What next?</p>
12        <p class="basic-paragraph" xml:lang='en-gb'>Once your ePUB
13        <p class="basic-paragraph" xml:lang='en-gb'>If there are s
14      </div>
15    </div>
16  </body>
17 </html>
18
```

The status bar at the bottom of the window displays '1 1 XML Unicode (UTF-8) Classic Mac (CR) 931 / 154 / 18'.

Audio/Video

Other than minor tweaks to styles, the only ePUB changes I regularly make directly in the code are to add audio or video. I'm sure you can probably import such content directly in InDesign but I find cutting&pasting boilerplate XHTML a lot simpler.

Conclusion

This article demonstrates the basic skills needed to generate an ePUB using InDesign.

As you can see, publishing an ePUB using Indesign is a little like using an aircraft carrier as a harbour ferry. Sure it will get you there but you're not really using its full potential. However its strengths in manipulating large text elements make it a valuable publishing tool to have in your toolkit.

References & Resources

Adobe websites

The Adobe official website is. Plenty of resources here, although most of the good stuff you can access directly from within InDesign.

<http://www.adobe.com/products/indesign/epub/howto/> - collection of authoring guides for ePUBs. Written for CS4 but mostly applicable for CS5 also.

- How to export for ePUB from InDesign
- Common questions about exporting EPUB files from InDesign
- Working with images in InDesign for export to EPUB

http://www.adobe.com/products/creativesuite/design/crossmedia_resources/ebooks_software.html - includes some more resources, including videos of the basics. Also of interest here is a topic on how to add the richer, interactive content (video, etc) directly in your publication.

Finally try the official blog. Search on ePUB to see what's been published:

<http://blogs.adobe.com/digitalpublishing/?s=epub>

Other websites

<http://threepress.org/> - is always a useful site for thoughts on ePUB, not just via InDesign. For example here's a great article that explains all those ePUB publishing options I said you did not have to worry about.

<http://blog.threepress.org/2009/11/23/choosing-indesign-epub-output-options/>

<http://www.pigsgourdsandwikis.com/> - is another great ePUB resource; so good she wrote the book on them. For example, here's her list of 22 reasons why you need to edit the ePUB source after InDesign finishes its publication:

<http://www.pigsgourdsandwikis.com/2010/09/why-i-crack-open-indesign-epubs.html>

As a final suggestion, here's an interesting article on the process of converting a regular book to an eBook. Less about the technical aspects, but about the suggested ways to adjust content and layout to respect the new approach.

<http://henrymelton.blogspot.com/2010/03/converting-novel-from-indesign-to-epub.html>

Video

Follow the Adobe links above for access to a series of official videos. There's also a vast collection of quick reference video content on Youtube. Just search for the topic you're after.

Finally I'd also recommend the Instant InDesign podcast (<http://www.instantindesign.com/>). Check out episodes 10 and 11 that dealt specifically with ePUBs.