

Preparing your InDesign files for ePub export

(updated to include CS5.5)

Ron Bilodeau

www.oreilly.com

ron@oreilly.com

blog: <http://www.oreilynet.com/pub/au/3771>

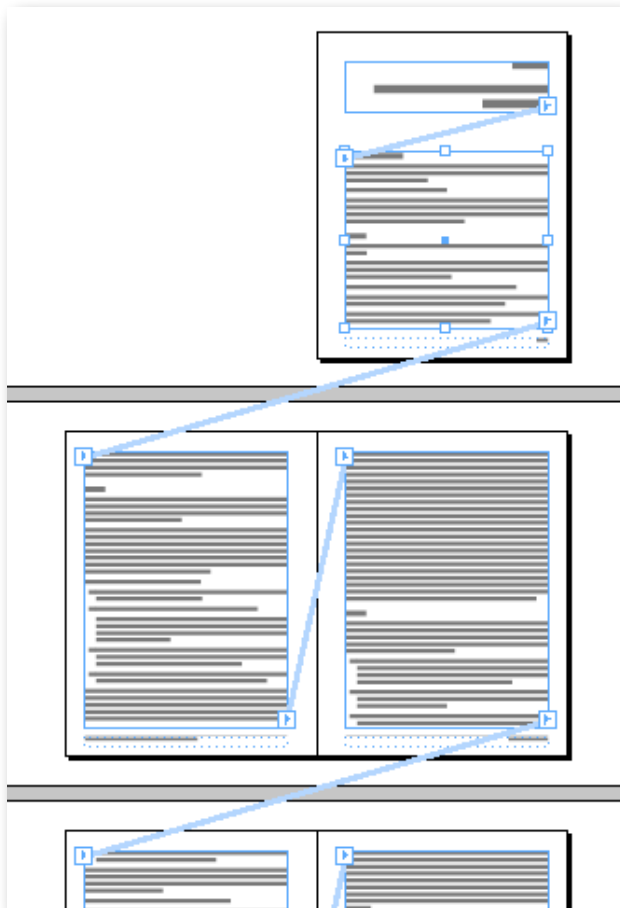
twitter: @biladew



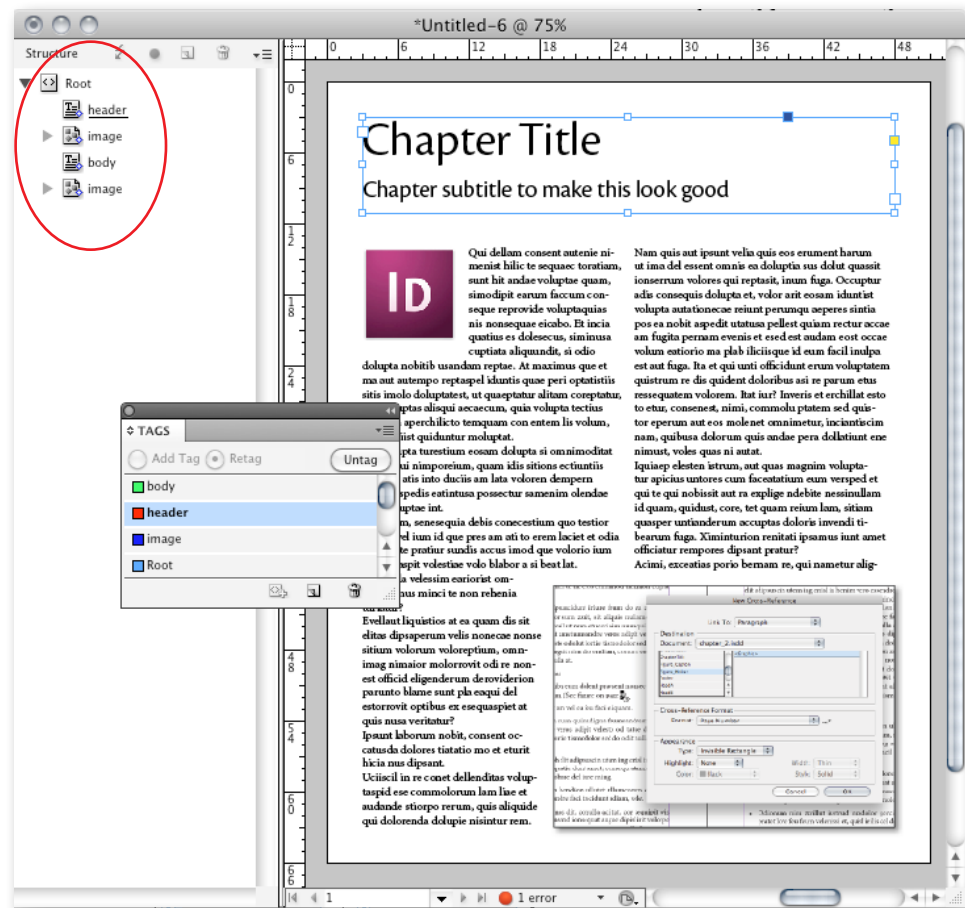
Organized Content Flow

Options for controlling the order of your content when exported to ePub:

1. Single text flow with linked frames



2. Order based on XML Structure



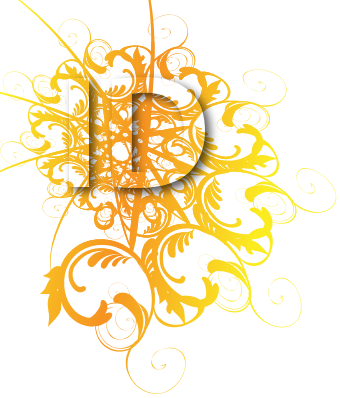


Organized Content Flow (cont.)

Options for controlling the order of your content when exported to ePub:

- 3. Order based on Articles Panel (New in CS5.5)

The screenshot displays an InDesign document with a chapter title and subtitle. Below the subtitle, there are several text blocks, each with a small 'ID' icon in a purple square. The Articles Panel on the right shows a list of articles, with the first article selected. A red circle highlights the 'New Article' button and the first article in the list. A dialog box for 'Cross-Reference' is also visible at the bottom of the screenshot.



Consistent Use of Styles

Always create and use Paragraph and character styles to style text

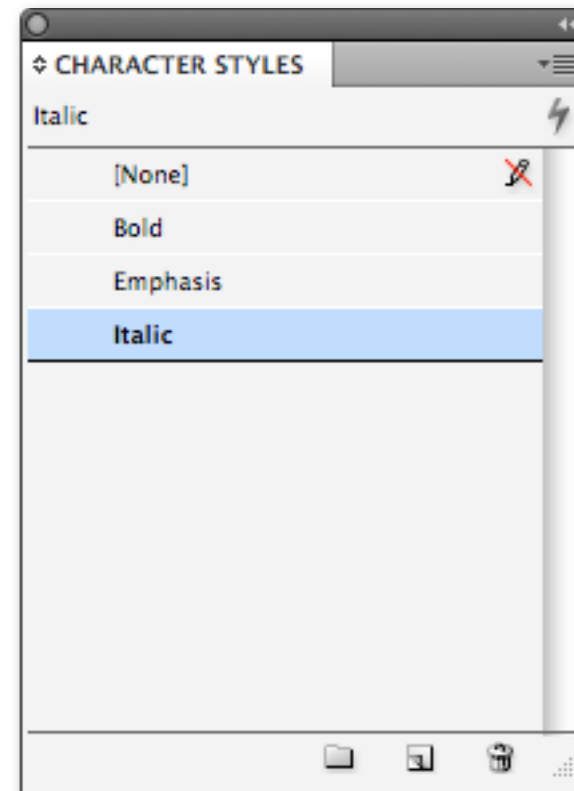
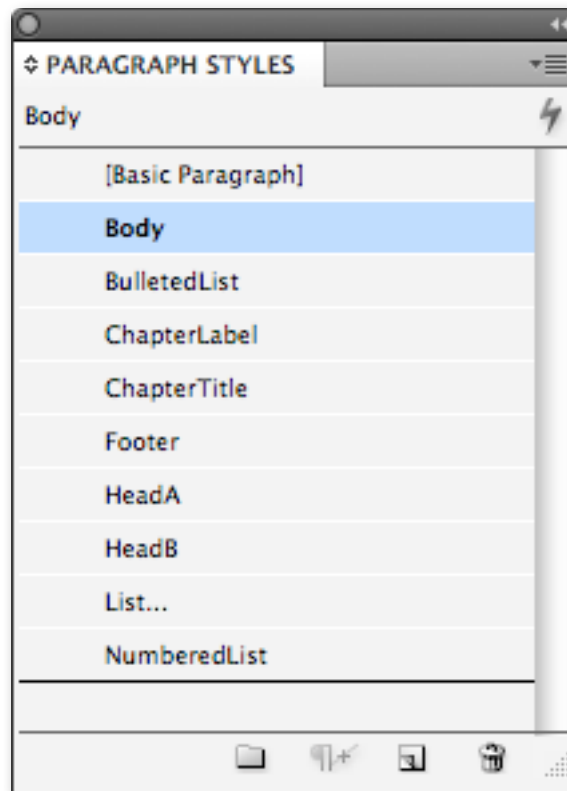




Figure Preparation

Controlling figure ordering when exported to ePub

From page 2 of this presentation, if you are using option 1 (Single text flow with linked frames) for your Content Flow Organization, then you need to place your figures using 1 of the following 2 options:

Inline

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Here is the "General" tab in the Digital Editions Export Options dialog box.

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If you use the XML Structure Pane or Articles Panel to dictate the order of your figures, then you do not need to apply the Inline or Anchored options listed above.

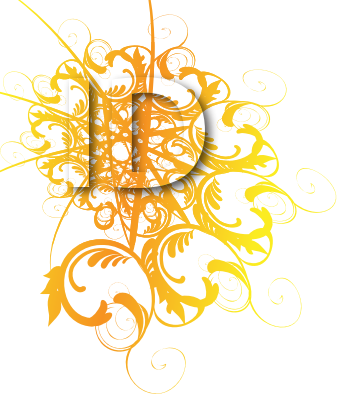
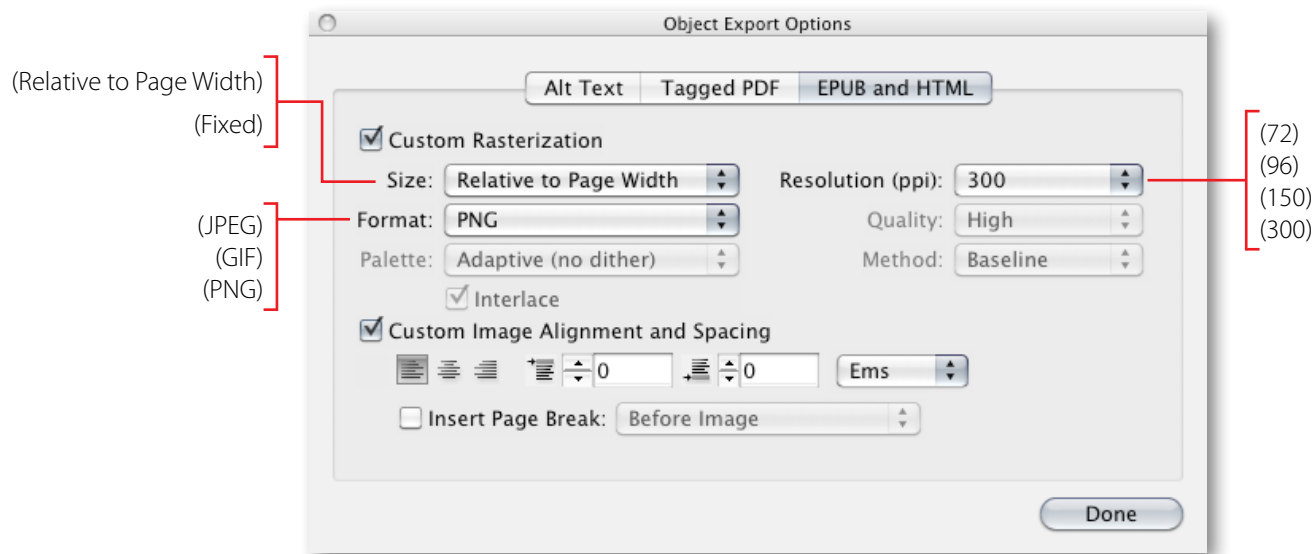


Figure Preparation (cont.)

Applying Figure export settings

New to CS5, is the Object Export Options dialog.

When exporting for ePub, this dialog can be used to set Custom Rasterization, Custom Image Alignment & Spacing, and also Alt Text.



These settings are not exclusive to linked figures.

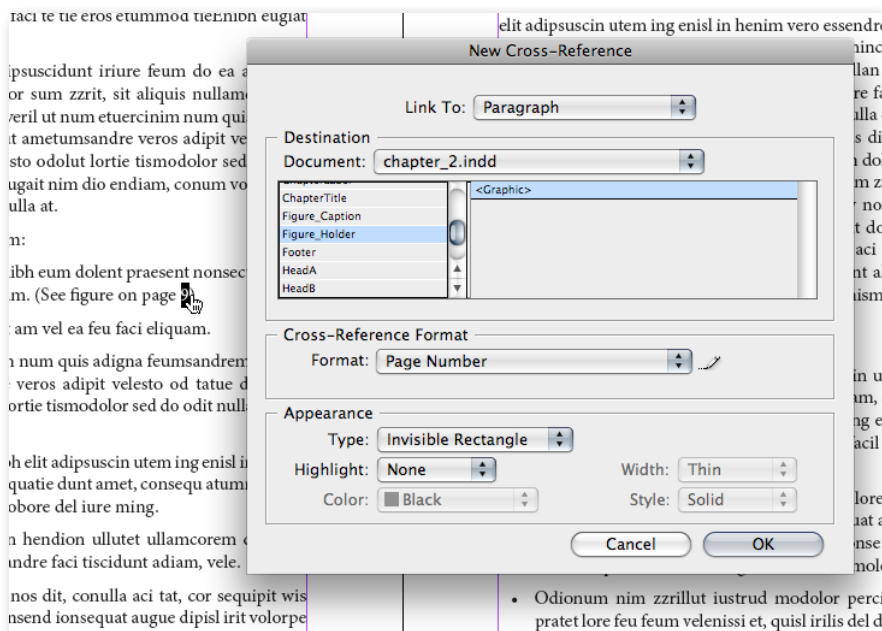
You can also use this dialog to tell InDesign to export any Object (or group of Objects) as a single optimized ePub-ready image.



Interactive Navigation

Hyperlinks and Cross-References

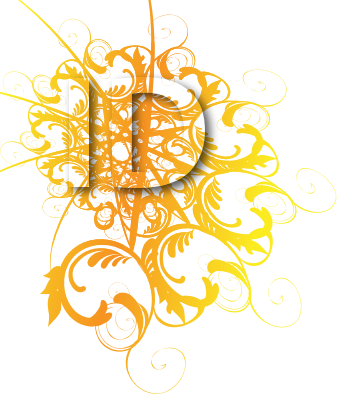
If your hyperlinks and cross-references are properly set up using InDesign's built-in functionality, then they will translate seamlessly to clickable hyperlinks when exported to ePub.*



Footnotes

Properly set up footnotes will also translate seamlessly to clickable hyperlinks when exported to ePub. The footnote reference link will take you to the footnote. Then, clicking the number at the beginning of the footnote will take you back to the reference.

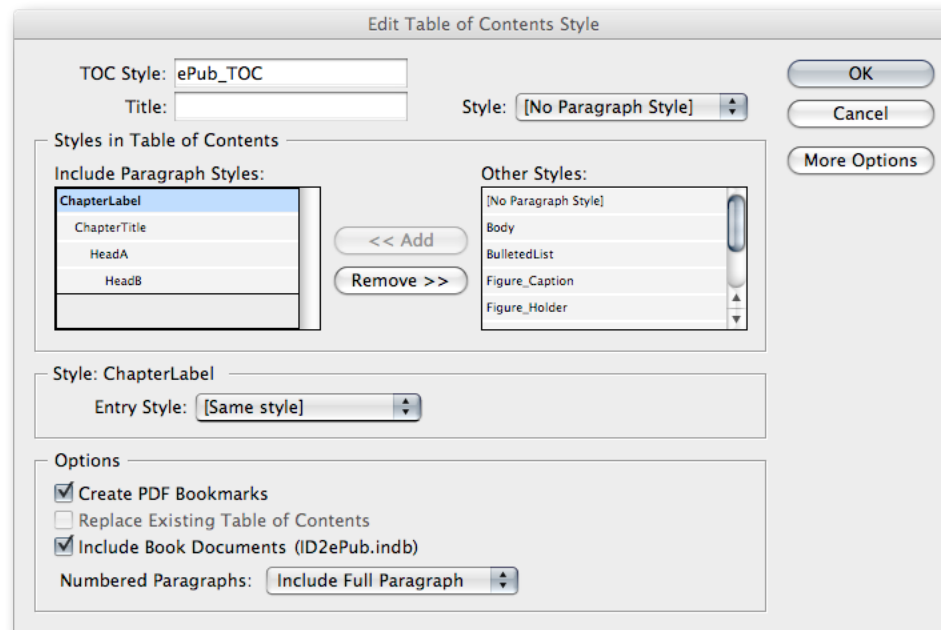
* There is currently a bug in CS5 that breaks some of these hyperlinks, but it is fixed in CS5.5

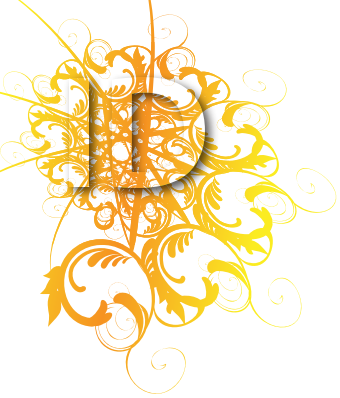


Interactive Navigation (cont.)

InDesign-Generated TOC (CS5.5 only)

If your file includes a properly generated Table of Contents, that too will be converted seamlessly to clickable hyperlinks when exported to ePub.





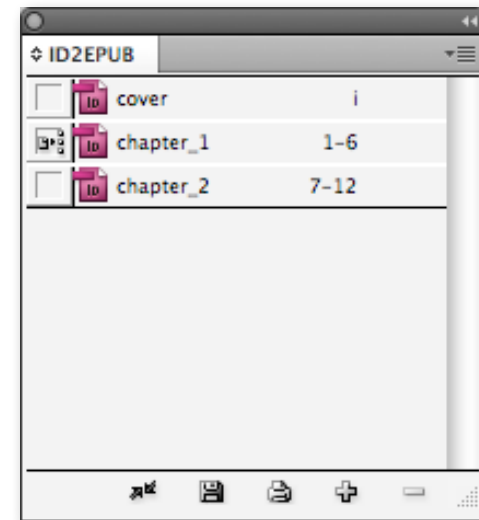
Using the InDesign Book file

If your project includes more than 1 InDesign file, then the Book file is necessary to properly export for ePub. Most of us are familiar with the benefits of using a Book file for print production, such as pagination and style-syncing.

But it is just as important for ePub export of multiple InDesign files (if not more so).

Here are some ePub-specific things that a Book file does for you:

- Dictates the order of your ePub html files
- One-step export to ePub
- Book Style Source used to indicate location of ePub TOC and File Info (metadata)
- Also used to sync and update style and cross-reference information across included documents



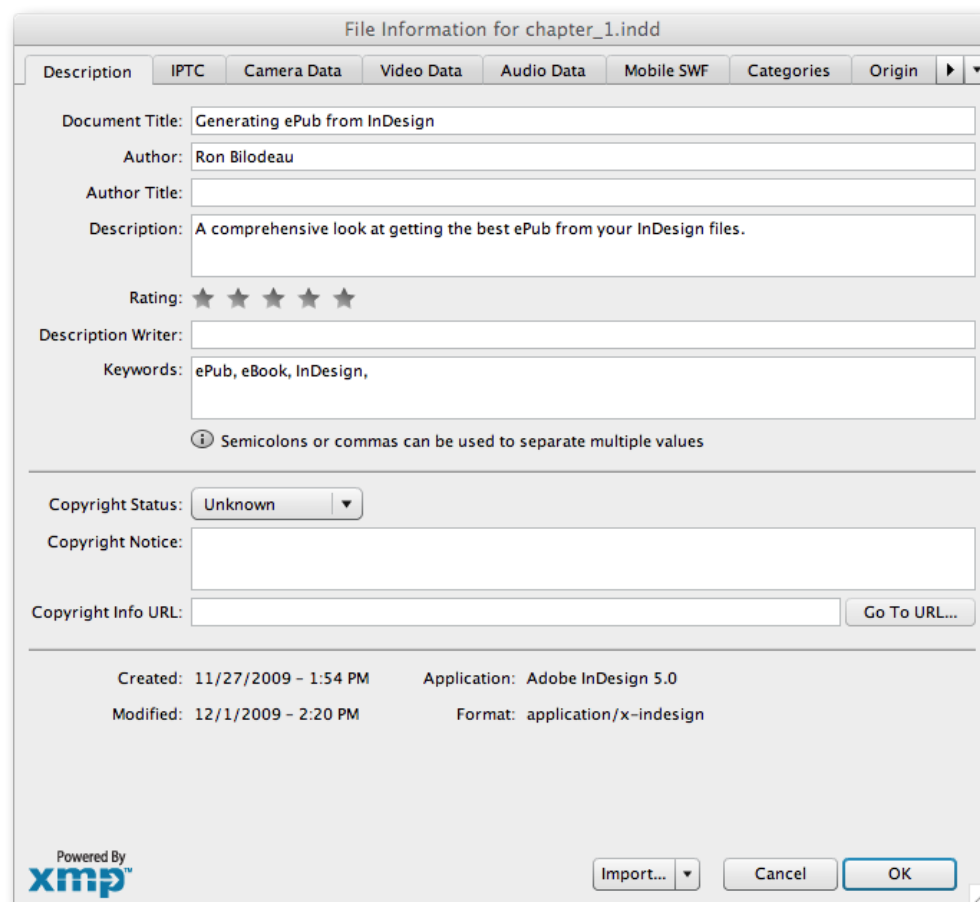


Including Metadata

In order to have InDesign include some basic metadata with your exported ePub file, you need to add it to the Description tab within the File Info dialog (File/File Info...).

You only need to add this information to 1 of your InDesign files (if there are more than 1), but make sure that it is the file designated by the Book panel as the style source.

If using CS5.5, the date info is added automatically, based on the day the ePub file is created.





Setting up the ePub TOC

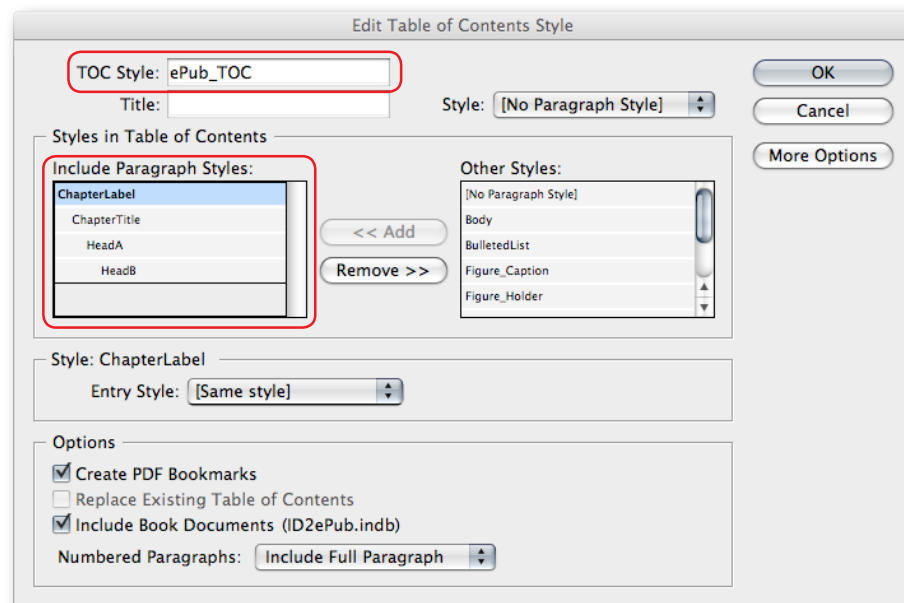
The Table of Contents Styles dialog that is used to create an auto-generated TOC for print is also the same dialog that is used to create the built-in ePub TOC (toc.ncx), that is accessible by most, if not all, ePub readers.

If you already have a TOC set up that includes the same styles that you would want in your ePub, then there is no need to create another style. Just select that one when exporting to ePub.

But if you don't already have one, it is very easy to set up.

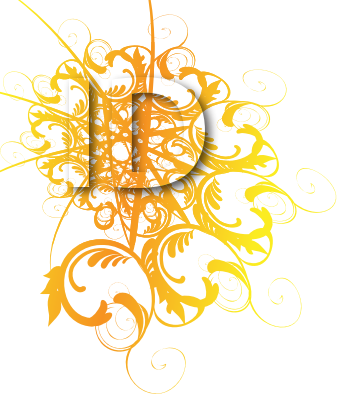
You only need to worry about 2 fields in the dialog when setting it up for ePub:

- TOC Style (Give it a name)
- Include Paragraph Styles (these are the styles that will create your entries)



Once the TOC Style is established, just save it and that is it. (But make sure that it lives in the file that is established as the style source in your Book panel.)

When you are ready to export your files to ePub, select it from the drop-down list in the Export Options dialog.



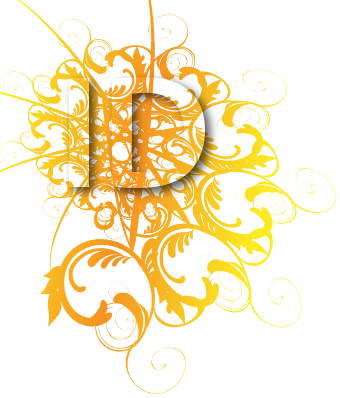
ePub Export Settings (CS5.5)

General Tab

The screenshot shows the 'EPUB Export Options' dialog box with the 'General' tab selected. The dialog is divided into several sections: 'EPUB', 'EPUB Cover', 'Ordering', and 'Formatting Options'. Annotations with red lines point to specific settings and provide explanations:

- EPUB Section:**
 - Include Document Metadata**: Annotated with 'Grabs metadata from File Info'.
 - Add Publisher Entry:** Text field containing 'O'Reilly Media, Inc.'. Annotated with 'This field will auto-populate on export if left empty'.
 - Unique Identifier:** Empty text field.
- EPUB Cover Section:**
 - No Cover Image**
 - Rasterize First Page**: Annotated with 'ePub cover rendering options'.
 - Use Existing Image File**: Includes a 'Choose' button and an empty text field.
- Ordering Section:**
 - Based on Page Layout**: Annotated with 'This option will order page elements from Left to Right and then Top to Bottom'.
 - Same as XML Structure**
 - Same as Articles Panel**: Annotated with 'See pages 2 & 3 for more info on these'.
- Formatting Options Section:**
 - Book Margin:** Text field with '0.5' and a unit dropdown set to 'Ems'. Annotated with 'ePub Margin settings for readers that allow this option'.
 - Bullets:** Dropdown menu set to 'Map to Unordered Lists'. Annotated with 'Bulleted List options: (Map to Unordered Lists) (Convert to Text)'.
 - Numbers:** Dropdown menu set to 'Map to Ordered Lists'. Annotated with 'Numbered List options: (Map to Ordered Lists) (Map to Static Ordered Lists) (Convert to Text)'.
 - View EPUB after Exporting**

Buttons for 'Cancel' and 'OK' are located at the bottom right of the dialog.

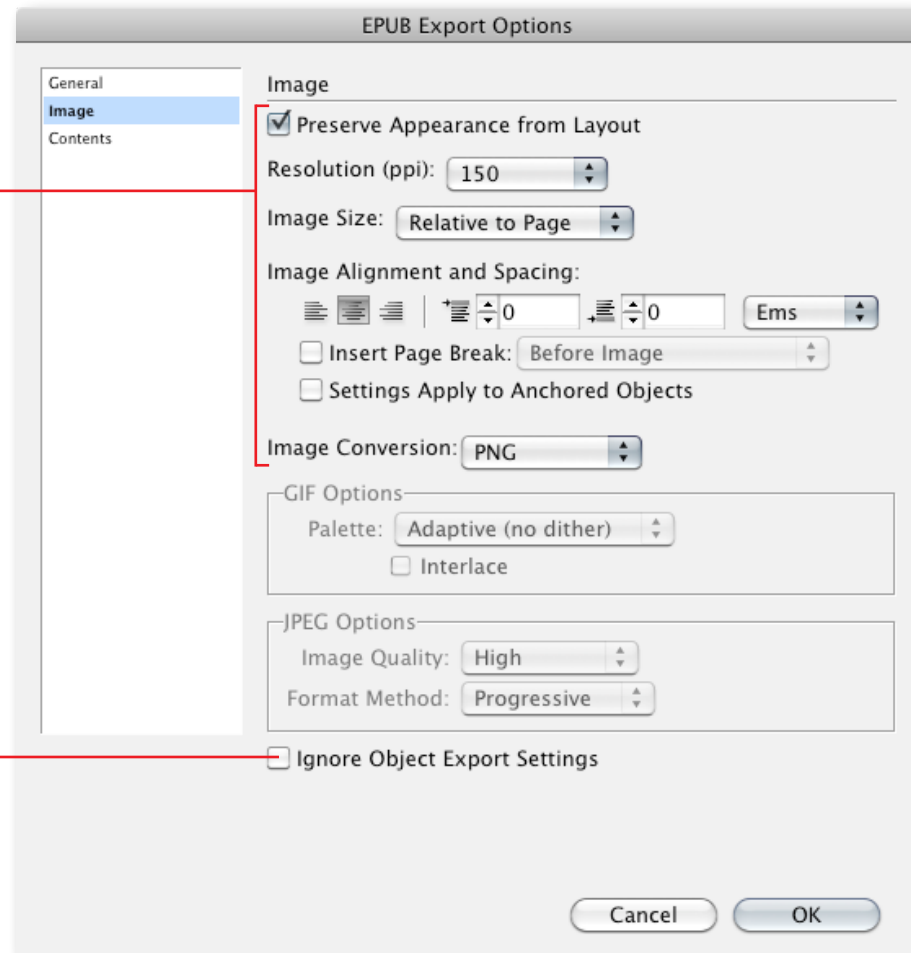


ePub Export Settings (CS5.5) (cont.)

Image Tab

These Image options are similar to the Object Export Options (page 6), but will be applied to any objects with no individual Object Export Options selected

Check this option only if you wish to ignore individual Object Export Options settings and use the above settings for all objects in your document(s)





ePub Export Settings (CS5.5) (cont.)

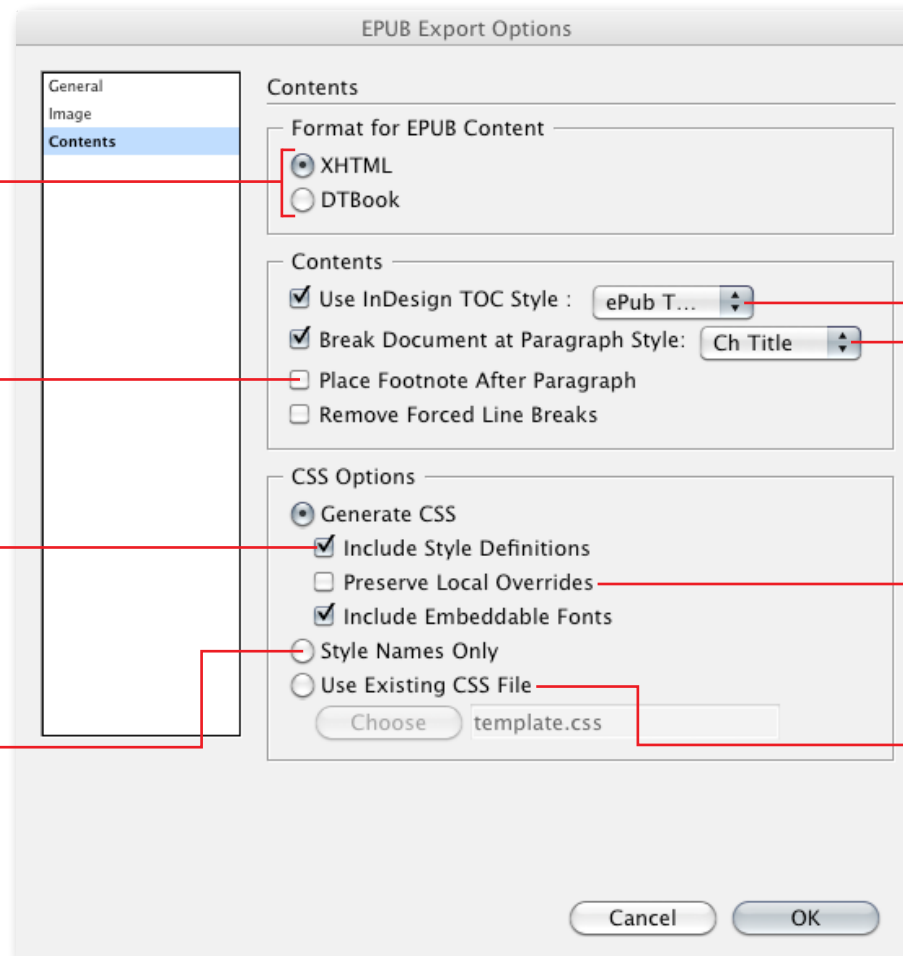
Contents Tab

Select DTBook (DAISY Digital Talking Book) only if you are creating a book intended for visually impaired readers

Footnotes will be placed at the end of each section if this is not checked

This option will build a stylesheet based on document Paragraph and Character styling

Select this option if you would like InDesign to create a stylesheet with names only (no definitions)

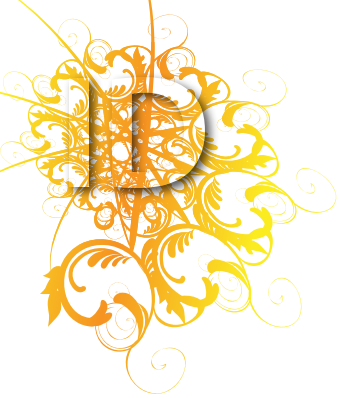


Drop down menu to select pre-defined ePub TOC information (page 11)

Drop down menu to select Paragraph Style that will indicate a new ePub page break

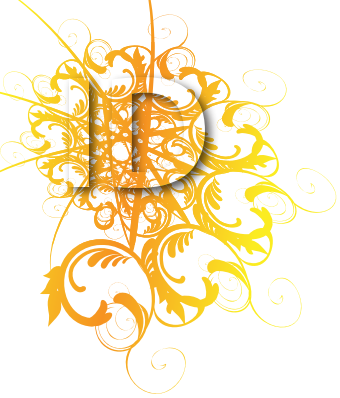
This option will create extra stylesheet elements to account for Style overrides

Select this option if you have a pre-existing stylesheet



What is not included when exporting to ePub

- **Master page elements**
headers, footers, page numbers, tabs, etc.
- **InDesign-generated TOC**
CS3, CS4, CS5
(included if using CS5.5)
- **InDesign-generated Index**
- **Paragraph Rules**
above and below
- **Nested Styles**
CS3, CS4, CS5
(included if using CS5.5)
- **Any elements on the pasteboard**
- **Fonts that are not OTF or TT**
or do not have the necessary embedable bits
- **Any outlines that are created within the InDesign document**
(ie. lines, shapes, icons, etc.)
CS3, CS4, CS5
(included if using CS5.5, but only if using the Articles Panel or directly applying an Object Export setting)



External References & Resources

- <http://indesignsecrets.com/>
The world's #1 resource for all things InDesign
- <http://www.threepress.org/document/epub-validate/>
Easy to use ePub validation tool
- <http://www.pigsgourdsandwikis.com/>
Liz Castro's blog, which is a great resource for ePub-related info, updates, and tips
- <http://www.teusdejong.nl/>
Teus de Jong's web site where you can find some great InDesign Scripts, including the CS5 xRef fix
- <http://idpf.org/>
The global trade and standards association for electronic publishing