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User Documentation

InDesign/XML Workflow

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Adobe InDesign's XML capabilities are unfortunately limited. A workflow in which typesetting is done with Adobe InDesign and in which XML according to the NLM DTD is the desired result presents some challenges. Importing XML into or exporting XML out of InDesign is not feasible. As a result, Inera recommends one of two alternative workflows, as described in this section.

Option 1: Word to InDesign, and Word to XML

The technically simpler workflow is to finalize the content in Microsoft Word and then create two branches. In the first branch, the Word file is imported into InDesign for composition, and at the same time, in the second branch the file is exported from Word to create XML. However, this type of workflow has two significant risks:

1 If there are any changes made to the content while in InDesign, those changes must also be made in the Word file, and then the export from Word to XML must be rerun. Note that making the same change in two places is inherently risky.

2 When the content is finalized Word, the format of tables (e.g. borders, cell alignment, etc.) must also be finalized. If further formatting changes are made to tables in InDesign, those changes must be reentered in Word or they will not correctly be reflected in the XML file.

This workflow does have the advantage that equations created with the Word Equation Editor or MathType can be correctly converted to MathML in the XML file.

Warning:

When using this option, it is not necessary to run eXtyles Post-Process Cleanup before importing the file into InDesign, although this step may be necessary to remove PubMed or CrossRef hyperlinks if you do not want them to appear in your PDF files. If you choose to remove these links, the text in the option "Remove Hyperlinks starting with text" should be " Medline" (with a leading space) to remove Medline links, and "doi:" (without a leading space) to remove DOIs, or modify as appropriate to your configuration.

However, if you do not run Post-Process Cleanup, it is necessary to use the eXtyles Hide/Show Tags item to hide the reference list tags before importing the file into InDesign.

OPTION 2: WORD TO INDESIGN TO RTF TO XML

A more complex workflow can be used if there will be significant corrections to the content after typesetting has been done in InDesign. This workflow has additional steps but is less likely to result in content that differs in the XML and PDF files. This workflow includes the following steps:

1 When editing is complete in Word and you are ready to import the document into InDesign, run eXtyles Post-Process Cleanup to remove certain eXtyles features from the Word file. The recommended settings for this dialog are shown in the section "Post-Processing Cleanup."

   It may be necessary to run Post-Processing Cleanup twice if you have run both eXtyles PubMed and CrossRef validation on the manuscript: once to remove Medline links, and once to remove DOIs from the reference list, if you choose to remove DOIs from your print content. If you choose to remove these links, the text in the option "Remove Hyperlinks starting with text" should be " Medline" (with a leading space" to remove Medline links, and "doi:" (without a leading space) to remove DOIs, or modify as appropriate for your setup.

2 Import the eXtyles file into InDesign.

3 Typeset the content, and make any corrections. Be sure when typesetting the file to use the InDesign table editor. Do not set tables using tabs in text frames.

4 When the pages are complete, export each text flow in InDesign to RTF. Note that there may be scripts or third-party tools that will enable this export to be completed in a single step rather than manually exporting each text flow or story to RTF.

5 Recombine the InDesign flows (body text, figure captions, tables, etc.) in a single Word file. The elements should be ordered in the Word file in the same order as they appeared in the Word file when it was first imported into InDesign.

6 Run the following eXtyles functions:

- Activate and Normalize (be sure to fill in all metadata correctly, including the page numbers, if applicable)

- Advanced Processing, including:

  - Bibliographic References

  - PubMed Reference Checking

  - CrossRef Reference Checking

  - Citation Matching

  - Author Processing

  Proofread the results of running Advanced Processes to ensure that no unexpected errors have crept into the document at this point.

- Remove any comments inserted by Advanced Processes by opening the Clean Up dialog, clicking Clear All, selecting Remove Word Comments, and pressing OK.

- Export using the appropriate filter.

Do not run any other eXtyles processes, as they may introduce incorrect changes to the text at this time. We also recommend that you proofread the results!

Please note the following additional points:

- InDesign may insert blank paragraphs around tables. These paragraphs should be removed before running Export.

- It should not be necessary to rerun Cleanup at this stage; however, it probably won't hurt to run it again.

- It should not be necessary to rerun eXtyles paragraph styling at this stage, provided that your Word and InDesign paragraph styles are completely aligned.

- If you have equations in your content that were originally created with the Microsoft Equation Editor or MathType and you want these equations to appear in MathML in the XML file, then you must copy the equations from the pre-InDesign Word file to the post-InDesign Word file. This workflow is necessary because InDesign cannot preserve equations as anything except a graphic.

Warning:

If you use this second approach, you must proof the equation carefully to ensure that no changes were made to it while it was in InDesign.