

Dealing with InDesign

Why you should have
InDesign when translating
InDesign files and what
you can do if you don't have it

Dave Calvert



The InDesign Universe

- **InDesign**

Version 4 introduced IDML—InDesign Markup Language

Version 6 was the last perpetually licensed version

Later versions are part of Adobe Creative Cloud—subscription only

The current version is InDesign 2024 (version 19.4)

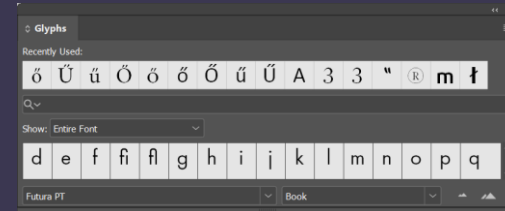
- **File Formats**

InDD (InDesign Document) is the native InDesign file format.

IDML (InDesign Markup Language) is a form of XML used to transfer layouts between versions

DTP language

- Typeface: E.g. Garamond, Futura, Calibri
- Font: A style of a typeface, e.g. bold, italic
- Glyph: A character in a font
- Galley: Columns of text. They show the line breaks and hyphenation breaks. InCopy has a galley view.
- Greeked text: Dummy text in the Latin alphabet—often modified Latin (https://en.wikipedia.org/wiki/Lorem_ipsum)



- Widows and orphans are alone. Either at the top or the bottom of a column

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Galley

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Slug line ¶

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The pasteboard

Galley's
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Slag line!
Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. 5
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. 6
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Dealing with a Design

Text frame behind graphic. Text overflow marked.

anim id est laborum. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum! 1
Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum! 2
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. 3
Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum! 4
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. 5
Slag line!
Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. 6
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Slag line!
Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. 8

The IDML filter (1)

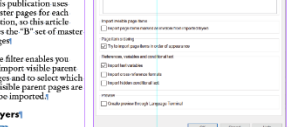
The imported content tab controls which content is imported.

Parent (master) pages

Master pages, now called parent pages by Adobe, are the first item in the InDesign filter. They may contain items such as page headers and footers with translatable text. They may also contain slummy text. Like normal pages, they can have layers. Master pages and layers can be visible or invisible.

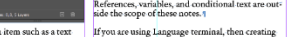
This publication uses master pages for each section, so this article uses the "D" set of master pages.

The filter enables you to import visible parent pages and to select which invisible parent pages are to be imported.



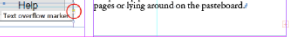
Layers

Layers can also be visible or invisible. Layers can be selected in the filter. Here, all layers are visible and three of them are locked:



Page items

Page items can also be visible or invisible. Hiding an item such as a text box that is part of a story— a lined series of text boxes—will not prevent the text in it being imported as long as at least one box in the story is not hidden. The box can be too small to display any text, but the entire story will still be imported.



The IDML filter (2)

The formatting and special characters tab controls how the content is imported.

Tags

Design uses lots of tags. Many of them are specific to the source language text. Others are not language-specific and must be preserved in the corresponding positions in the target version. They often locally override style settings. The filter enables you to make a first selection of which tags to keep.

Treat semi-bold as bold

Usually no. Tracking is controlled by the styles and the tags.

Maintain locally defined tracking

Usually no. Tracking is the space between letters over a number of letters. Local means applied as an override to the style.

Maintain locally defined kerning

Usually no. Kerning is the space between two specific letters. This should only be preserved where the kerned text is not translatable, e.g. a brand name as a logo, e.g.!

Maintain locally defined baseline fitting

Usually yes. This should usually be preserved as some designers use it for $\frac{1}{2}$ or $\frac{1}{4}$ instead of the built-in $\frac{1}{2}$ and $\frac{1}{4}$ formats. It's also used for inline graphics like this one!

Maintain locally defined vertical scale

Usually no. Vertical scale is not often used.

Maintain locally defined horizontal scale

Usually no. Horizontal scale may be used for fitting text. Sometimes used instead of tracking to produce an even text flow.

Maintain locally defined skew

Yes if present. Skew is sometimes used to imitate italics when an italic font is not available.

Maintain locally defined leading

The terms come from letterpress typesetting, where lines of text were spaced by hammering in strips of lead between them.

Special characters

Line separator

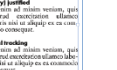
The filter offers the choice of ignore, inline tag, and Break segment. Sometimes designers use a heading font and a line separator to keep a heading with a paragraph of body copy. If your source document contains lots of such paragraphs, you could consider setting the filter to break the segment at a soft return. But there may be more soft returns in the body copy. Inline tag is safest but can mean you have to manually split segments.

Paragraph separator

Usually set to Break segment.

Tab character

If tables are made with tabs, then Break segment to separate the cell contents.

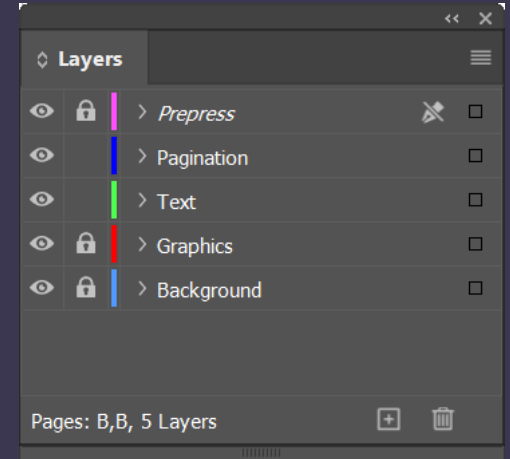
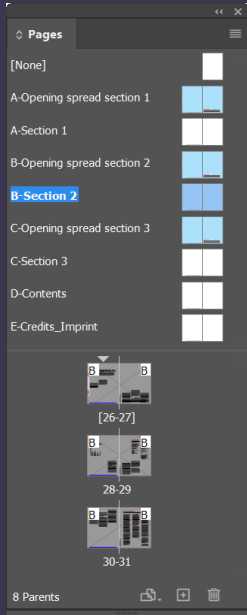


This is text overflow from the story on page 3.

Layouts

- Parent (master) pages
Parent pages help to define a uniform look
- Spreads are normally two pages but can be only one or more than two (a fold-out)
- Stories consist of one or more text frames
- Frames hold text or graphics and are placed on layers

- Layers can be visible or hidden



Tags

- Some are only useful for the source
- Other tags must be preserved
- Tags often locally override a defined style
- The filter can eliminate a lot of tags

InDesign uses lots of tags. Many of them are specific to the source language text. Others are not **language-specific** and must be preserved in the corresponding positions in the target version. They often locally override style settings. **The filter enables you to make a first selection of which tags to keep.**

• Tracking

`uf` InDesign uses lots of tags.

• Line separator

Many of them are specific `nl` `uf` to the source language text.

• Bold

Others are not `uf fs='Bold'` **language-specific** `uf` and must be preserved in the corresponding positions in the target version.

• Underline

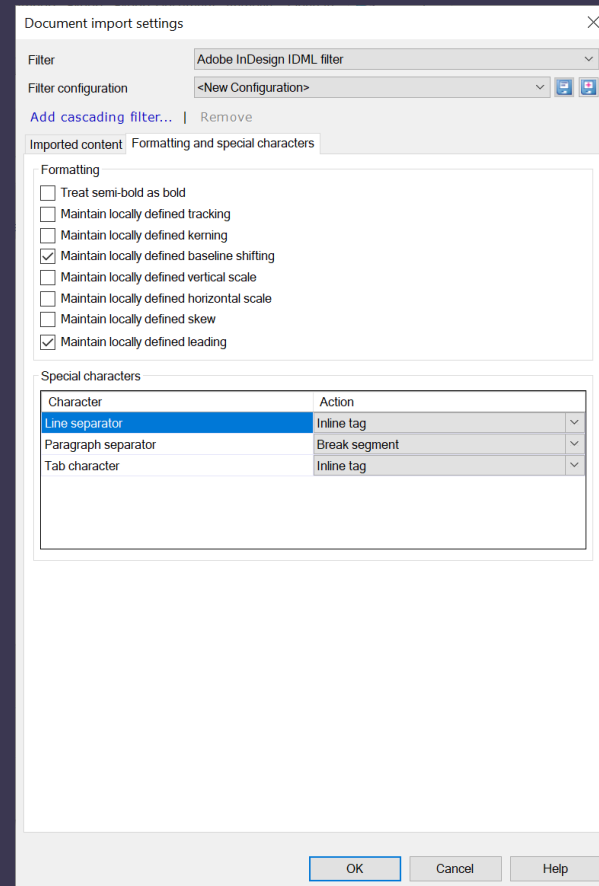
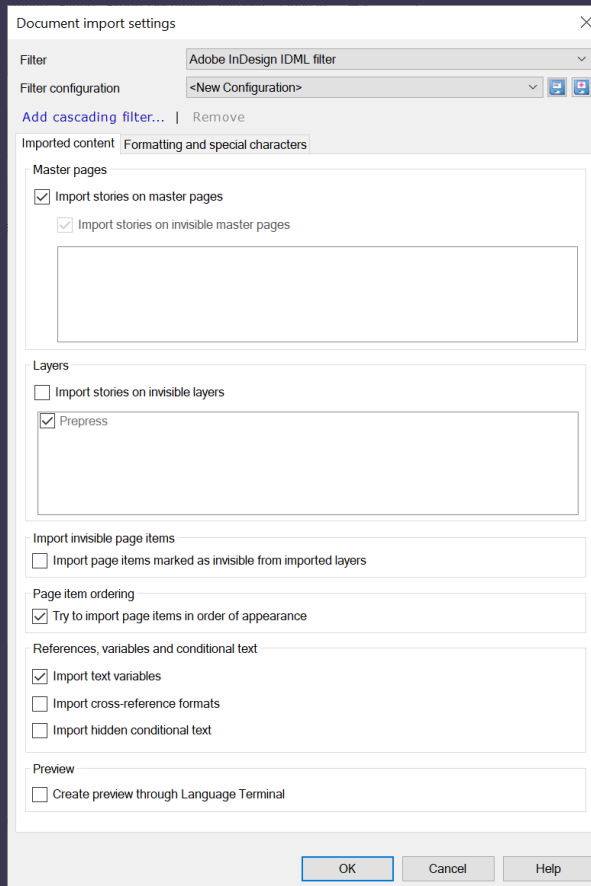
`nl` They often `uf` locally `uf` override style settings.

• Font

`uf f='Futura PT' fs='Medium'` The filter enables you to make a first selection of which tags `nl` to keep. `uf`

The memoQ IDML filter

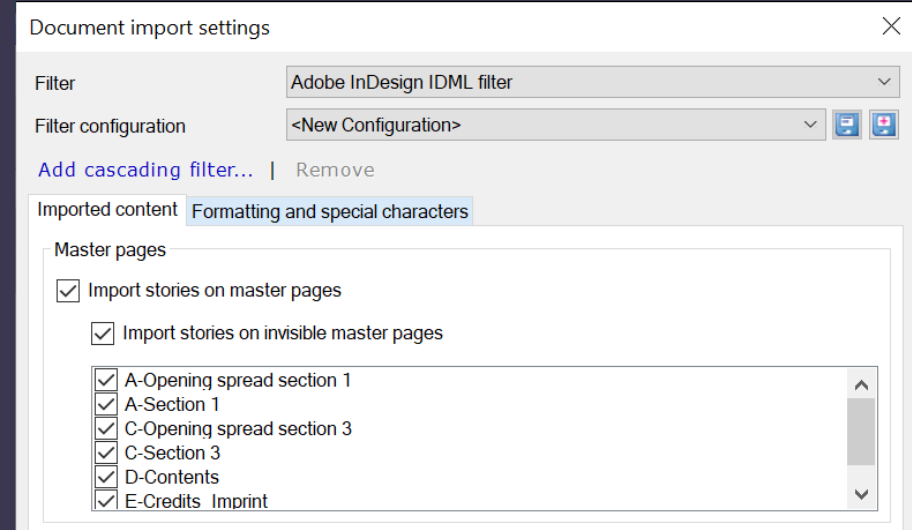
- Two tabs: “What” to import and “How” to import it



The IDML filter — Imported content tab (1)

Pages, layers, and objects

- Master pages
 - Now called “parent pages”
 - Often hold real or dummy text
 - Parent pages often hold a mixture of translatable and dummy text, e.g. real page headers and dummy copy
- Import stories on master pages imports from used parent page spreads
- Import stories on invisible master pages imports text from unused parent page spreads



- This publication has section layouts, each beginning with a double-page spread. The sections have their own page headers.

The IDML filter — Imported content tab (2)

Pages, layers, and objects

- Layers
 - Sometimes used for alternative or different-language versions of text
 - Can be hidden (“invisible”)
- Objects/page items
 - Can be hidden
- Page item ordering
 - InDesign objects are not numbered in order of appearance

Layers

Import stories on invisible layers

Import page items marked as invisible from imported layers

Page item ordering

Try to import page items in order of appearance

References, variables and conditional text

Import text variables

Import cross-reference formats

Import hidden conditional text

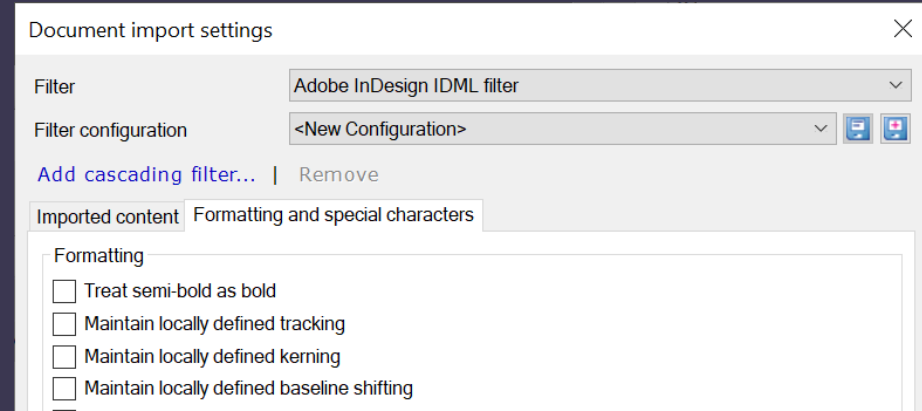
Preview

Create preview through Language Terminal

OK Cancel Help

Formatting and special characters tab (1)

- **Treat semi-bold as bold**
 - I haven't found a use for this
- **Maintain locally defined tracking**
- **Tracking** is the spacing of a series of characters. Used for justification, language-specific, usually not checked



Maintain locally defined tracking not checked (default)

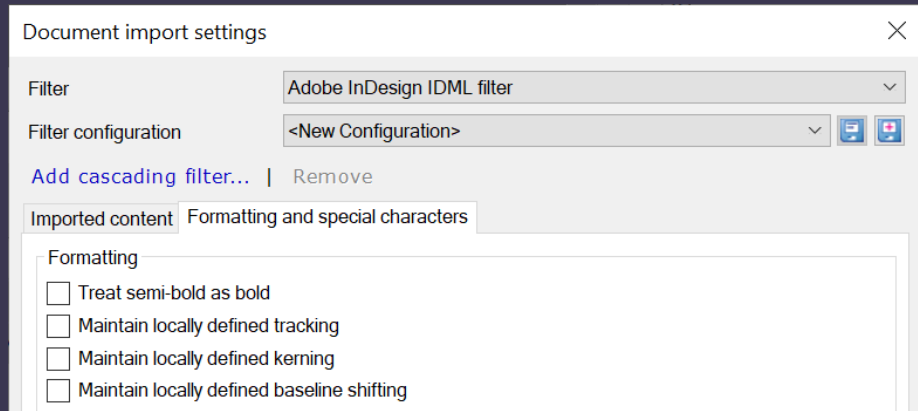
Usually no. Tracking is the spacing between letters over a number of letters. Local means applied as an override to the style. This is often used to get an even text flow or to control the overall length and is thus language-specific.

Maintain locally defined tracking checked

Usually no. Tracking is the spacing between letters over a number of letters. Local means applied as an override to the style. This is often used to get an even text flow or to control the overall length and is thus language-specific.

Formatting and special characters tab (2)

- **Maintain locally defined kerning**
 - **Kerning** is the spacing between two individual letters
 - Must be checked for untranslatable headlines, logos etc. Otherwise almost always not checked



Maintain locally defined kerning not checked (default)

Kerning is set by the font

Maintain locally defined kerning checked

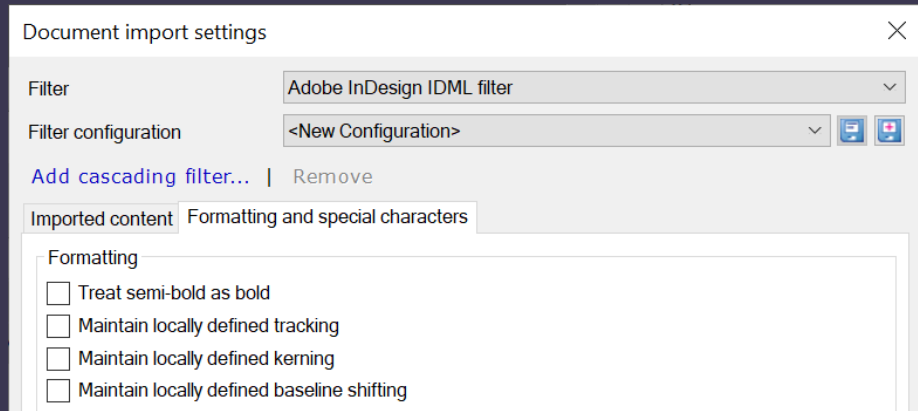
Manual kerning preserved

TransForm


TransForm

Formatting and special characters tab (3)


- **Maintain locally defined baseline shifting**
- **Baseline shifting** is raising or lowering one or more characters relative to the imaginary line on which the characters sit. Sometimes used for inline graphics, subscripts, superscripts, symbols, etc. Check if present



Baseline shifting preserved

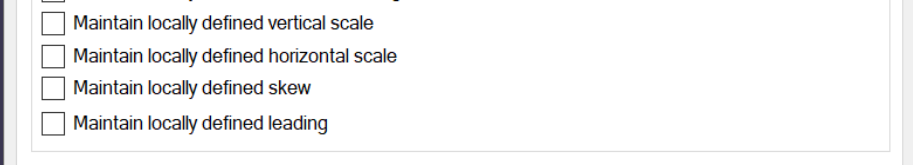
This should usually be preserved as some designers use it for ^{subscripts} or ^{superscripts} / instead of the built-in ^{superscript} and _{subscript} formats. It's also used for inline graphics like this  one.

Not preserved

This should usually be preserved as some designers use it for ^{subscripts} or ^{superscripts} / instead of the built-in ^{superscript} and _{subscript} formats. It's also used for inline graphics like this  one.

Formatting and special characters tab (4)

- **Maintain locally defined vertical scale**
 - Rarely necessary, usually not checked
- **Maintain locally defined horizontal scale**
 - Sometimes used for copy fitting

- 
- Maintain locally defined vertical scale
 - Maintain locally defined horizontal scale
 - Maintain locally defined skew
 - Maintain locally defined leading

Default—not checked

Vertical scale

Vertical scale is not often used.

Horizontal scale

Horizontal scale may be used for fitting text. Sometimes used instead of tracking to produce an even text flow.

Maintain locally defined... checked

...vertical scale

Vertical scale is not often used.

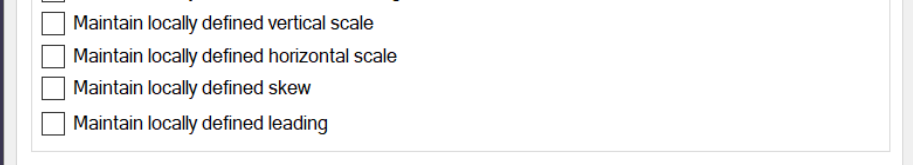
...horizontal scale

Horizontal scale may be used for fitting text. Sometimes used instead of tracking to produce an even text flow.

Formatting and special characters tab (5)

Maintain locally defined skew

- **Skew** sets the angle of slope of the text. Sometimes used where a true italic face is not available. Check if present

- 
- Maintain locally defined vertical scale
 - Maintain locally defined horizontal scale
 - Maintain locally defined skew
 - Maintain locally defined leading

Skew is sometimes used to create the appearance of italics when an *italic* font is not available.

Skew is sometimes used to create the appearance of italics when an *italic* font is not available.

Maintain locally defined leading

- **Leading** is the spacing between lines. Usually check

Leading is the spacing between lines. The term comes from letterpress typesetting, where lines of text were spaced by hammering in strips of lead between them.

Leading is the spacing between lines. The term comes from letterpress typesetting, where lines of text were spaced by hammering in strips of lead between them.

Formatting and special characters tab (6)

Special characters

- Can all be set to:
Ignore
Inline tag
Break segment

- The line separator is sometimes used inconsistently as both a line and a paragraph separator.
Usually set to Inline tag but other settings sometimes make sense

Special characters	
Character	Action
Line separator	Inline tag <input type="button" value="v"/>
Paragraph separator	Break segment <input type="button" value="v"/>
Tab character	Inline tag <input type="button" value="v"/>

- The paragraph separator should almost always be set to Break segment
- Usually set the tab character to Break segment, sometimes to Inline tag

Ignore, tag or break segment?

Original

Headlines can be a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

» 1.0 » 2.0 » 3.0 » 4.0 » 9.9

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1.0 2.0 3.0 4.0 9.9

Headlines can be a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0 2.0 3.0 4.0 9.9

Ignore newline, break paragraph, break tab

Headlines can be a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0

2.0

3.0

Headlines can be

a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0

2.0

Headlines can be a headache This is a 3-line

paragraph intended to demonstrate the effect of some filter settings.

1.0 2.0 3.0 4.0 9.9

Headlines can be a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0

Tag newline, break on paragraph, break on tab

Headlines can be a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0

2.0

3.0

Headlines can be

a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0

2.0

Headlines can be a headache This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

1.0

2.0

3.0

Break newline, break on paragraph, tag tab

Headlines can be a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

» 1.0 » 2.0 » 3.0 » 4.0 » 9.9

Headlines can be

a headache

This is a 3-line paragraph intended to demonstrate the effect of some filter settings.

» 1.0 » 2.0 » 3.0 » 4.0 » 9.9

Headlines can be

a headache

This is a 3-line paragraph

intended to demonstrate the effect of some filter settings.

» 1.0 » 2.0 » 3.0 » 4.0 » 9.9

Too much text?

Dealing with InDesign

Filter notes

Dave Calvert



The IDML filter (1)

The Imported content tab controls which content is imported

Parent (master) pages

Master pages, now called parent pages by Adobe, are the first items in the InDesign filter. They may contain items such as page headers and footers with trackable text. They may also contain dummy text. Like normal pages, they can have layers. Master pages and layers can be visible or invisible.

This publication uses master pages for each section, so this article uses the "B" set of master pages.

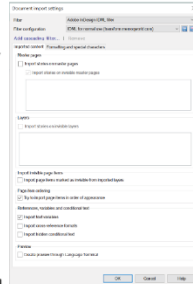
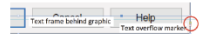
The filter enables you to import visible parent pages and to select which invisible parent pages are to be imported.

Layers

Layers can also be visible or invisible. Layers can be selected in the filter. Here, all layers are visible and three of them are locked.

Page items

Page items can also be visible or invisible. Hiding an item such as a text box that is part of a story—linked series of text boxes—will not prevent the text in it being imported as long as at least one box in the story is not hidden. The box can be too small to display any text, but the entire story will still be imported.



Importing page items in order of appearance is helpful and mostly accurate. InDesign numbers page items in its own way, which can be very different to the order of the pages.

References, variables, and conditional text are outside the scope of these notes.

If you are using Language terminal, then creating a preview can be helpful. However, there may be version and font issues.

A round trip and a PDF preview can help determining which items to exclude from import. It can also reveal problem areas.

Performing a sanity check on the analysis results can pick up problems with unwanted text on master pages or lying around on the pastebord.

2

The IDML filter (2)

The formatting and special characters tab controls how the content is imported

Tags

InDesign uses lots of tags. Many of them are specific to the source language text. Others are not language-specific and must be preserved in the corresponding positions in the target version. They often locally override style settings. The filter enables you to make a first selection of which tags to keep.

Treat semi-bold as bold

Usually **no**. The typefaces are controlled by the styles and the tags.


Maintain locally defined tracking

Usually **no**. Tracking is the spacing between letters over a number of letters. Local means applied as an override to the style.

Maintain locally defined kerning

Usually **no**. Kerning is the space between two specific letters. This should only be preserved where the kerned text is not translatable, e.g. a brand name as a logo, e.g.

Transform

Maintain locally defined baseline shifting
Usually **yes**. This should usually be preserved as some designers use it for $\frac{1}{2}$ em or $\frac{3}{4}$ em instead of the built-in $\frac{1}{2}$ em and $\frac{3}{4}$ em formats. It's also used for inline graphics like this  one.

Maintain locally defined vertical scale

Usually **no**. Vertical scale is not often used.

Maintain locally defined horizontal scale

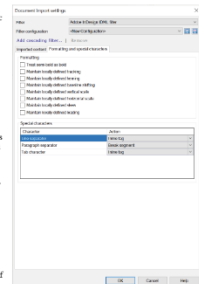
Usually **no**. Horizontal scale may be used for fitting text. Sometimes used instead of tracking to produce an even text flow.

Maintain locally defined skew

Yes if present. Skew is sometimes used to imitate italics when an italic font is not available.

Maintain locally defined leading

Usually **yes**. Leading is the spacing between lines. The term comes from letterpress typesetting, where lines of text were spaced by hammering in strips of lead between them.



Special characters

Line separator

The filter offers the choice of ignore, inline tag, and Break segment. Sometimes designers use a leading foot and a line separator to keep a leading with a paragraph of body copy. If your source document contains lots of such paragraphs, you could consider setting the filter to break the segment at a soft return. But there may be more soft returns in the body copy. Inline tag is safest but can mean you have to manually split segments.

Paragraph separator

Usually set to Break segment.

Tab character

If tabs are made with tabs, then Break segment to separate the cell contents.

3

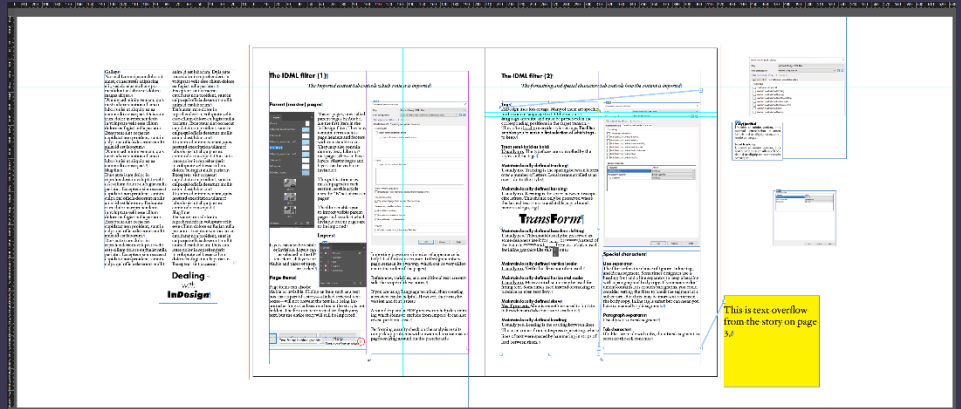
4 pages in the PDF, approx. 700 words;
the analysis says 2,629 words, 1,726 of
them repetition



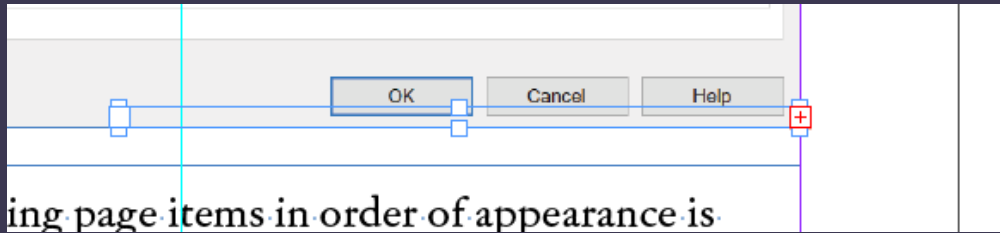
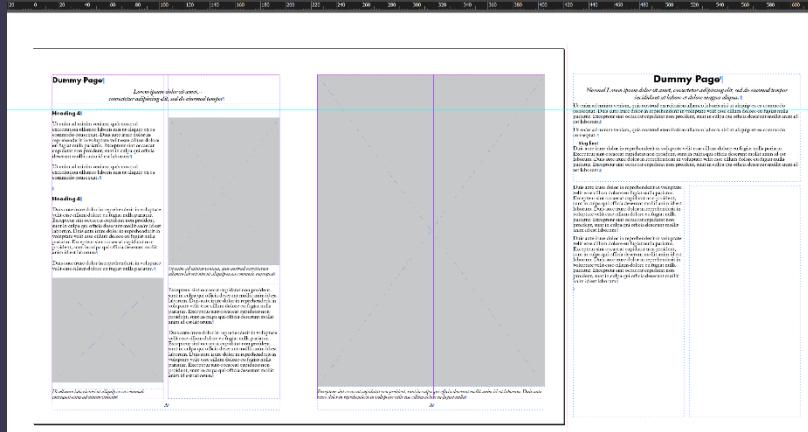
Where's it hiding?

- Text on the pasteboard
You need InDesign to fix this

- Text on parent/master pages or the parent page pasteboard
Use the filter to fix this



- Overset text
You need InDesign to fix this



Formats and fonts

- **InDesign**

- The **InDD** file format is complicated and version-specific
- **IDML** is a form of XML. It can be read and written by every version of InDesign starting from version 4 and by memoQ.

IDML files include the links to the graphics, but not the graphics themselves

An InDD original and **Language Terminal** will output an InDD file from the current version of InDesign and will generate a zip file containing the INDD file, an IDML file, and a PDF.

The string “.indd” in an IDML filename may cause problems exporting from the memoQ client.

- **Fonts**

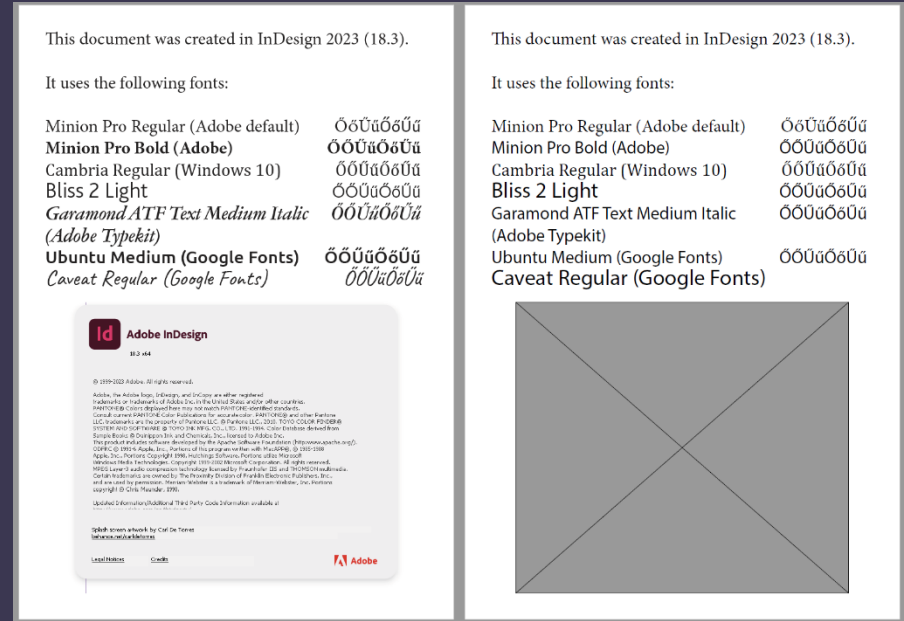
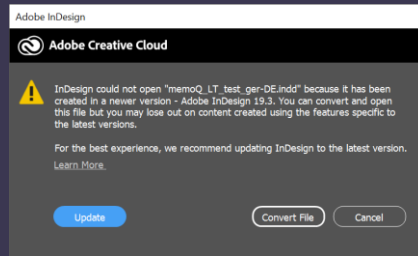
It's very unlikely that you will have access to the fonts used in the original document

Language Terminal

- PDF preview (right)
- The fonts have been temporarily replaced
- One font replacement has caused text overflow
- The graphic is not present

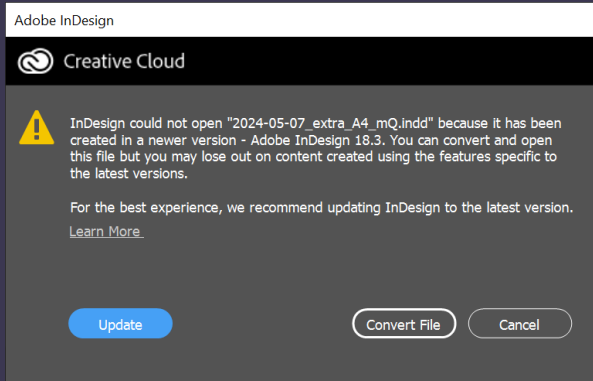
The fonts and the link to the graphic were all preserved in the target IDML

The target INDD was exported in the InDesign 2024 format



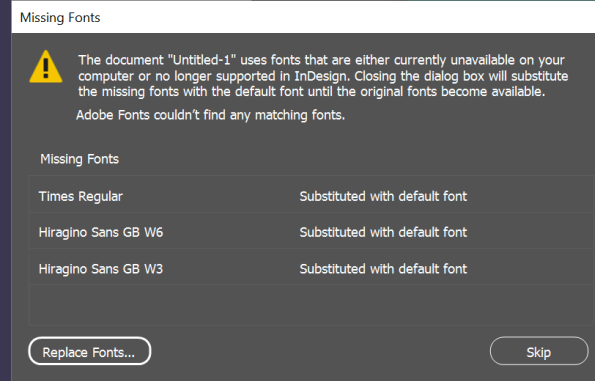
Compatibility and fonts

Compatibility

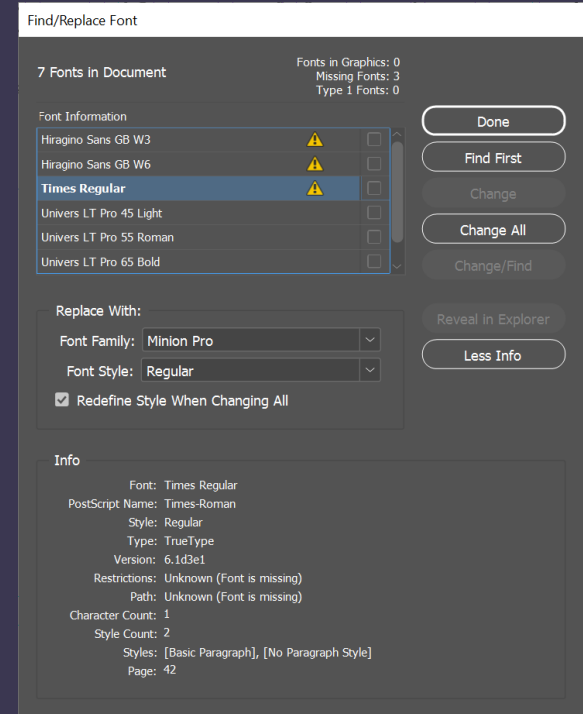


InDesign Document format changes with every major version and cannot be read by older versions

Fonts



InDesign warns you if fonts are missing and offers to replace them



InCopy

- Cut-down version of InDesign for copy-editing
- Useful in a publishing system
- Cannot save or open InDD or IDML files
- No control over size of PDF, high-resolution only
- No access to layout geometry

Why you could use InDesign

- To fix formatting problems before and after translation
- To improve formatting consistency, e.g. removing newlines and discretionary hyphens in body copy
- To locate overset text
- To tidy up the pasteboard and remove non-translatable text
- To tidy up parent pages

What you can do if you don't have it

- Always ask for an IDML and a PDF
- Check your analysis and your imported source against the PDF
 - Excess text
 - Bad segmentation
- Use Language Terminal
 - To prepare an IDML file from an INDD file
 - To export PDF previews
 - If you use pseudotranslation to check that all of the text is being translated
- Try to get InDesign. CS6 can read and write IDML
- Subscribe to Adobe CC

Questions?

T*rans***F***orm*

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