

INDEXING IN INDESIGN

I love indexing in InDesign.

And I was surprised by that realization when I first learned how to use it. I had been prepared to quickly uncover its various deficiencies and figure out how to work around them. But, unlike the indexing components in other desktop publishing applications, InDesign seems to have been designed by someone who actually understands the indexing process.

InDesign's indexing module still has limitations but, even so, it stands head and shoulder above others I have worked with. For example, I would never consider indexing directly in Word or FrameMaker without using add-on utilities. I even wrote an article for Key Words about this and titled it "Indexing in FrameMaker Without Tearing Your Hair Out" (link on <http://luciehaskins.com/resources.shtml>). I think that title says it all. I do *not* tear my hair out when I index in InDesign.

What I like about InDesign:

1. It continues to gain popularity in the publishing industry.
2. I'm getting clients outside the computer-book industry who want indexes embedded in InDesign. That hadn't been my experience previously.
3. It has a strong future in the evolving e-book and digital printing marketplace.
4. Its functionality.

INDEXING CONSIDERATIONS

Two major considerations for indexers to be aware of during the embedding process include:

Index Entry Placement

Clients might have guidelines/restrictions regarding *where* to place (insert/embed) the index entry. This is important because indexers aren't the only ones in the content. If the writer needs to go into the file after index entries have been carefully embedded and accidentally deletes an index entry while modifying content, that would be unfortunate. And placement has a lot to do with putting index entries in harm's way.

Some clients give indexers complete freedom regarding placement location, allowing embedding anywhere in the text: in the middle of paragraphs, the beginning of paragraphs, inside image captions, etc.

Other clients have guidelines that identify placement policies such as: embed index markers at the very beginning or very end of paragraphs or embed index markers one or two words into a paragraph and one or two words from the end of a paragraph and restrictions such as: no index entries in image captions, tables, footnotes, and sidebars.

Be aware of and comply with client policies. They exist for a reason.

Accidental Changes to Content

Remember, index entries are embedded in "live" files that will be returned to the clients. If the indexer accidentally changes the formatting of a header or the alignment of a graphic, that inadvertent change will be included in the updated file that the client receives.

Remain super vigilant about inadvertent changes like : adding an extra space here and there, deleting a space, or heaven forbid! deleting a section or two of content! The Undo button is wonderful to use if even the possibility of an oops exists! It's far easier to Undo a few steps (and potentially remove index entries in the process) than worry about what accidental changes *might* have gone back to the client.

As a natural follow-up to the CAUTION above, save a copy of the original INDD files and tuck them in a safe location in case the absolute worst happens and an oops! occurs where the file is trashed and too difficult to recover. Then the original file can be used to compare to and, if necessary, start fresh in a newly copied working version of that chapter.

INDESIGN FILE ORGANIZATION

The file structure can be confusing at first but the files used are easy to understand once they are identified.



Book file

The book file (.INDB extension) identifies all the other files in the book. It's like the container that holds everything else. It identifies the chapters' order of appearance in the book (and their physical location in the computer directories/folders).

Chapter files

These files (.INDD extension) contain the actual content for the book and are the files that will be updated with the embedded index entries. Typical breakouts are one file per chapter of content, so they are commonly called *chapter files*.

Index file

Indexes *can* be generated within chapter files but common practice for book-length projects is to create a completely separate (.INDD) file for the index. By placing indexes in completely separate files, different formatting can be applied for the index than for the content pages.

INDESIGN COMPONENTS

There are two workspaces to consider when customizing views. In addition, the **Tools Toolbar** contains tools used during the embedding process.

Workspaces

InDesign provides two main views: layout windows and story windows.

Layout windows display the WYSIWYG (formatted) view of the content. The content displays as it will appear on the printed page. The **Story Editor** (story window) provides a text-only view of the content. Each view has its advantages/disadvantages and it's a matter of personal preference which view might be most suitable.

Text Frame Concept

Text frames are used in InDesign to flow content across multiple pages. Index files also have text frames that flow across multiple pages and laying out indexes can be problematic until this concept is understood.



Tools Toolbar

The **Tools Toolbar** contains the tools supported by InDesign. The four tools identified below are the ones most commonly used while indexing.

Pointer tool (solid filled) moves items on the page and is also used to layout out the index later in the process.

Text tool inserts index entries in desired locations in the content.

Hand tool helps maneuver around the screen and between pages.

Magnifying glass tool zooms content in and out.

TYPICAL INDEXING PROCESS

Embedded indexing is an *intrusive* and an *iterative* process. It's never complete the first time through these steps, so just work through the text, add and manipulate the index entries as necessary, and continue to regenerate the index when needed.

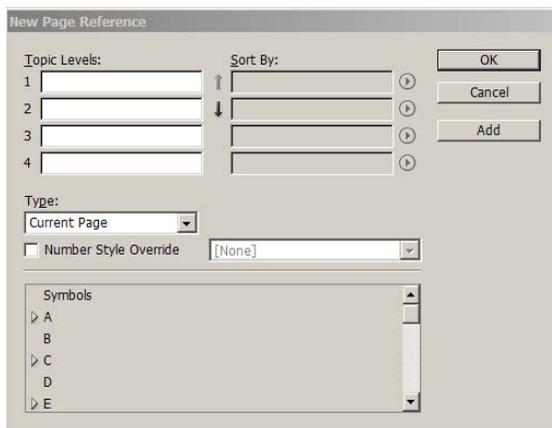
High-level overview of typical process:

1. Setup book, chapter, and index files
2. Index content of book (embed index entries into content)
3. Generate index as often as desired
4. Final steps

Repeat steps 2 and 3 as often as necessary

Step 2. Index content of book

The **New Page Reference dialog box** (Ctrl-7/Cmd-7) is the typical method used to add entries to content. The process is simple. Using the Text Tool, position the cursor in the desired location in the content.



Then create the index entry within the dialog box.

Topic Level 1 is the main entry field.

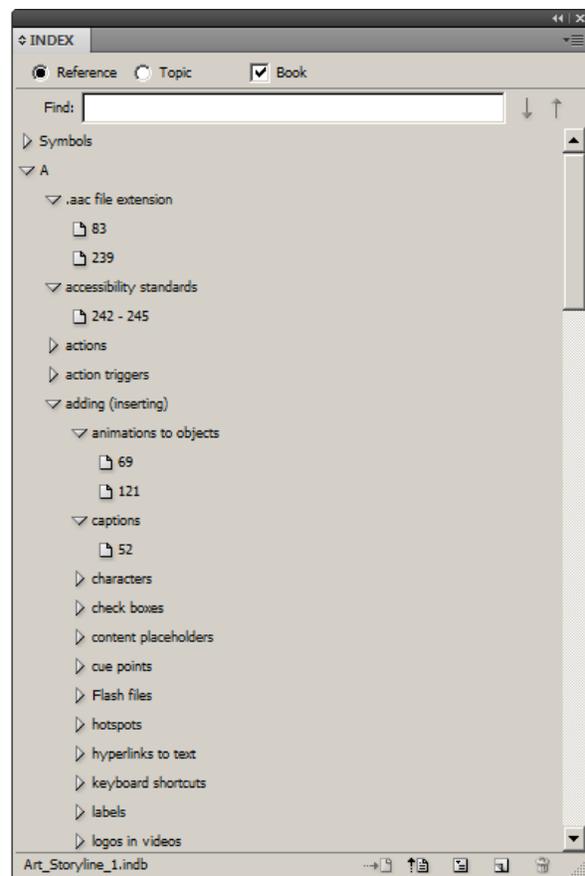
Topic Level 2 is the subentry field and so on.

There are quite a few options available regarding how to designate page ranges and cross-references (under the **Type:** pulldown list).

Enter an alternative sort for the entries by typing the desired sort order in the **Sort By:** fields.

The **Index palette** is a multi-purpose window that provides the following functionality:

- previewing index entries
- searching via **Find:** field
- navigating to specific entries
- deleting entries
- duplicating entries
- modifying entries (cascading changes or single entry)
- generating indexes
- creating new entries



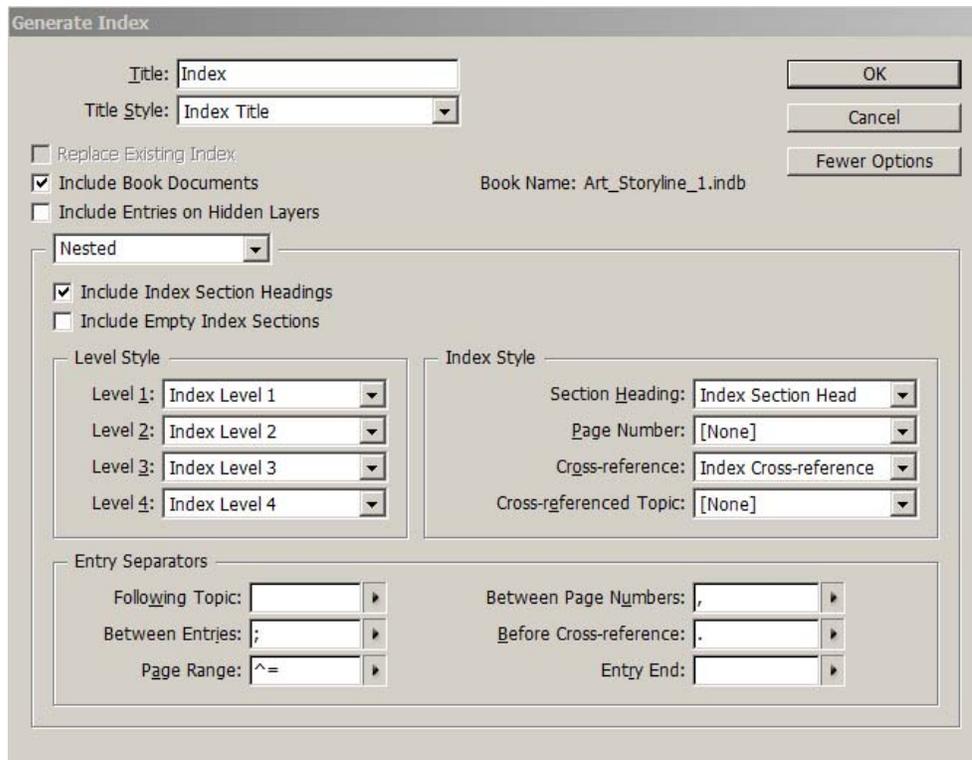
Step 3. Generate index

Embedding entries is just one step in the indexing process. Generating the index to display those index entries is a completely SEPARATE step.

In addition, generated indexes are STATIC files. That is, if an index entry is added or modified or deleted *after* the index is generated, the index will *not* reflect those changes until the next time the index is generated.

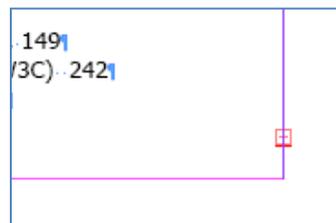
To generate an index, the index file needs to be the active document. Click the **Generate Index icon** (middle icon on bottom row of Index palette).

The **Generate Index dialog box** displays. Customize the options as desired and press OK.



When the index is first generated, it might need to be laid out. Laying out index entries can be quite confusing to someone new to this concept. The **Pointer tool** changes to a "loaded" cursor (which contains the content that need to be flowed into the next text frame(s) for the index). Paste the content into the next text frame and check if a red plus sign appears in the lower right corner of that text frame. If it does, that means that the process needs repeating. (Repeat until the red plus sign no longer appears in the last text frame in the index.)

Method
Manual text flow 
Semi-autoflow  by holding down Alt (Windows) or Option (Mac OS) when you click.
Autoflow  by Shift-clicking.
Fixed-page autoflow  by holding down Shift+Alt (Windows) or Shift+Option (Mac OS) when you click.



FINAL THOUGHTS

The climate is right for learning more about embedded indexing and InDesign is an application that appears to have a lot of staying power. For indexers interested in embedded indexing, InDesign is worth investigating further.