

## Indexes in Adobe InDesign CC

Adobe InDesign Creative Cloud (CC) was launched in June 2013. A new feature in this version is embedded indexing that generates hyperlinked index entries in multiple digital formats, such as PDF, EPUB, and HTML. In embedded indexing, markers (or tags) are inserted into the electronic text and are used to generate page numbers for the index in a print book and hyperlinked page numbers in digital formats (PDF, EPUB, HTML). Previous versions of InDesign included the embedded indexing feature, but indexes were not linked in EPUBs or HTML. Now they are, and they work beautifully.

InDesign CC offers the publisher these capabilities:

- Multiple formats (print, PDF, EPUB, HTML) with linked indexes are available using a single set of tagged files.
- Editions may be updated by indexing only the new and revised content.
- On-demand versions, such as coursepacks, may be generated without reindexing the content.
- Legacy books in previous InDesign versions may be converted to CC in order to use the linked index feature. Index markers need to be added if the earlier version does not include them.

For indexers and publishers to work together, both need to use the same version of InDesign, such as 6.0 or 6.5 or CC. Because the CC version is available as a subscription, the indexer and publisher can easily work together using the same version. In addition, the cost to the indexer is now reasonable. Instead of buying different versions, the indexer can subscribe to InDesign CC for one month for \$30, complete the project, and then cancel the subscription. In short, it is now much easier to produce user-friendly indexes in multiple formats.

### Digital workflow

1. The editor provides the indexer with working files that have been edited and proofread. Individual chapters may be sent as they become ready for indexing.
2. The indexer may use dedicated indexing software (such as Cindex, Macrex, or Sky) to write the index. The indexer sorts the index created in the dedicated indexing software by page number and then inserts the markers into the InDesign file while working in page number order. Plug-ins to speed this process are available from Kerntiff Publishing Systems.
3. Alternatively the indexer may index directly in InDesign without using dedicated indexing software. The indexer edits and revises the index while embedding the markers. By generating a draft index frequently, the indexer is able to see the growing index and to revise the markers as needed.
4. InDesign does not include bold or italic text in its index entries nor does it include decorated page numbers, such as numbers with t for tables or f for figures. The indexer and designer need to plan for this problem so that the designer can find the entries needing character formatting. For example, the indexer might mark italic text with \* and decorated page numbers with \$. Each time the index is generated, bold or italic styles and the decorations on page numbers are lost and need to be reapplied by the designer.

5. The indexer returns the working files with markers to the editor and includes any special instructions for styles. The indexer includes a generated index, but the publisher should regenerate the index after the files are back on the publisher's computer and apply style changes to the index's default styles.
6. If major content revisions are made to the working files after the markers are entered, the editor returns the working files to the indexer to revise the markers.
7. The designer generates a draft index for final approval. Any special styles added to the draft index will be lost and need to be reapplied when the final index is generated.
8. After approval of the draft index, the designer applies special styles to the final index that will be used in the output of multiple formats.
9. The final index is proofread. If changes are needed to the index markers, the editor returns the working files to the indexer to make the changes. If the changes are minor style changes, such as those added at the end to the final index, the designer makes the revisions. The index is now ready.

Note: An alternate process uses two stages. First, the editor produces the print book without using the embedded indexing feature. The index will be created in dedicated indexing software. Second, after the print book goes to press, the editor sends the InDesign files to the indexer to embed the markers using the index created for the print edition. This process is useful if the production schedule does not allow time for embedding markers before the print book goes to press.

## **Index styles**

Index style options are restricted to those features available in InDesign. Any index styles not available in InDesign must be added by the designer. If the index is regenerated, the style changes must be reapplied.

## **Features that work well**

- Indented vs. run-in option
- Levels of headings available (main, subheadings, sub-subheadings)
- Force sort of main entries. For example, *The Orenda* may be sorted to appear in the Os, not the Ts.
- Initial capitals for main entries available as a global style
- Word-by-word only alphabetical sort available
- Cross-references placed always after main entry
- Alphabetic headers (A, B, C, to separate alphabetic groups in the index)
- Entry separator options
- Page sort (roman numerals to appear before Arabic numerals)

## **Features that require workarounds**

- Multiple cross-references. If there are multiple cross-references, each one will be displayed as a separate cross-reference: *See also* Vancouver, BC. *See also* Kelowna,

BC. The indexer may combine these two cross-references so they appear together: *See also Kelowna, BC; Vancouver, BC*. If the indexer makes changes in the wording of the main entry, the indexer needs to change the wording in the cross-reference.

- **Generic cross-references.** Generic cross-references are those that refer to a general category, such as *See also specific cities and towns*. The italicized part of the generic cross-reference needs to be added by the designer to the final index.
- **Styled text in the index.** Italics and bold text and page numbers with special features must be added by the designer to the final index. As mentioned above, the indexer and designer need to agree on a work process.

### **General Tips**

- **Changes to working files.** The indexer should avoid making inadvertent changes to working files.
- **Marker placement.** The indexer should choose locations for markers that are closest to the term or the area that provides context. Markers may be placed in headings, subheadings, and cells of tables.
- **Wording of entries.** If possible, indexers should use concise wording. Long main entries and subentries tend to create odd-looking breaks and turnover lines in EPUBs.
- **Cross-reference issues.** Because cross-references are not hyperlinked, indexers may want to double post entries. The cross-reference feature is buggy; editing of cross-references after they are entered sometimes causes them to disappear.
- **On-demand versions.** If smaller books are created from selected chapters, such as coursepacks, the editor should send the new group of files to the indexer to edit the shorter index. Problems may include missing cross-references and orphaned subheads.
- **Columns.** For the print book, use two or three columns as needed. For the PDF and EPUB versions, use a single column without “continued” headings.
- **Indents.** EPUB index indents need to be deepened by editing the CSS style sheet. For instructions, go to the Digital Trends Task Force area of the website for the American Society for Indexing.
- **Plug-ins.** Indexers may want to use the plug-ins available from Kerntiff Publishing Systems. IndexUtilities is a highly recommended collection of scripts and plug-ins that help embed index markers.

## For More Information

Adobe InDesign Secrets. <http://indesignsecrets.com>

List of indexers proficient in InDesign (forthcoming June 2014)

Adobe Systems Inc. "InDesign/Creating an Index." <http://helpx.adobe.com/learning.html>

American Society for Indexing. Digital Trends Task Force (DTTF).

[www.asindexing.org/about-indexing/digital-trends-task-force](http://www.asindexing.org/about-indexing/digital-trends-task-force)

Includes an extensive list of useful links. For a broad overview of tools, see "The Matrix 1: Indexing Tools and Output Options" and "The Matrix 2: Linking to vs. Embedding in."

For information on how to change the default EPUB index indenting to a more readable format, go to Tools & Conversions.

American Society of Indexers. *Indexing for Editors and Authors: A Practical Guide to Understanding Indexes*. Information Today, Inc., 2008. Available as a print edition and as an EPUB with a linked index.

InDesign indexing training

Lucie Haskins, [www.luciehaskins.com](http://www.luciehaskins.com)

Cheryl Landes, [www.tabbycatco.com](http://www.tabbycatco.com)

Jan Wright, [ww.wrightinformation.com](http://ww.wrightinformation.com)

Indexing Society of Canada/Société canadienne d'indexation. [www.indexers.ca](http://www.indexers.ca)

To find an indexer familiar with InDesign, use the search feature for Find an Indexer and enter the term "InDesign."

Kerntiff Publishing Systems. [www.kerntiff.co.uk](http://www.kerntiff.co.uk). InDesign indexing utilities are available for CC and earlier versions (Mac or PC) for \$150. For articles and a supplementary user manual, see Lucie Haskins's website: [www.luciehaskins.com](http://www.luciehaskins.com).

Kvern, Olav Martin, David Blatner, and Bob Bringhurst. *Real World Adobe InDesign CC*. Peachpit Press, 2014.

Leverage Technologies. [www.levtechinc.com](http://www.levtechinc.com)

Dave Ream specializes in software utilities for publishing and indexing.

Lynda.com Training. [www.lynda.com](http://www.lynda.com). The indexing feature is demonstrated in the InDesign video on long documents.

Society of Indexers. Publishing Technology Group. [www.ptg-indexers.org.uk](http://www.ptg-indexers.org.uk)

The British indexers group offers many useful links and resources.

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