Indexing in InDesign® CS2
Sample book for this process - 320 pages

1. Create a new file in InDesign with the same number of pages in your book.
   File > New >Document > Number of Pages 320, beginning with Page 1
   Double click on the Master Pages (A-Document Master) **Window > Pages** and add the number of columns you will use in your "real" index pages.
   Layout > Margins and Columns - choose 4 (or how many you will be using) columns per page with a pica space between and click **Okay**. Double click on page 1
   Save as "Index Book" in a location of your choice.
   File > Save

2. When a spread is finished on a *real* yearbook file, select all the text on the spread by holding down the shift key and clicking on each text block and copy.
   Edit > Copy

3. In the *Index Book* go to the corresponding spread (if the *real* spread is page 42-43, then go to page 42-43 of the *Index Book* file) and paste the text on that spread.
   Edit > Paste in Place
   Make sure the copy boxes are touching only the page they are to be indexed on. If a text box is touching both page 42 and 43, any "tagged" names in that text box will be listed on page 42 in the index.

4. Click on a text box with the **arrow tool** or **text tool** and open the story in "Edit in Story Editor." **Edit > Edit in Story Editor** or stay on the page and turn on "Show Hidden Characters" **Type > Show Hidden Characters**

5. Highlight a name and press (mac) **Command+Shift+Option+]** (win) **CTRL+Shift+Alt+]** to make last names first or (mac) **Command+Shift+Option+[** (win) **CTRL+Shift+Alt+[** to keep name as is. This will add a tag in front of the name to indicate it has been tagged. The "tag" will show in front of the name in the "Edit in Story Editor" mode as ⊼ and on the page as ∧ if "Show Hidden Characters" is on.

   ∧John Doe *(a name that has been tagged)* will appear in the index as *Doe, John.*

   InDesign indexes off the last word of a name
   If the individual has a multiple name, such as *Mary Beth Jones,* she will appear as *Jones, Mary Beth* but *Joe de la Garza* will appear as *Garza, Joe de la*. Add a "non-breaking white space" between certain parts of the name and Joe will appear as *de la Garza, Joe* in the index.

   To insert a white space, highlight the space between the words you want to keep together and "Insert a White Space" **Type > Insert White Space > Non-Breaking Space**, then highlight the entire name and press (mac) (mac) **Command+Shift+Option+]** (win) **CTRL+Shift+Alt+]**, and the indexing feature will see the two or more words as one and index them as such - *de la Garza, Joe.*

   Ex: **Joe***(regular spacebar)***d**e*(white space)***la***(white space)***Garza** = ∧**de la Garza, Joe**

6. **Creating an index…**
   After doing a few spreads, go to the spread in the *Index Book* where the index will begin in the *real* book. Example: page 300, then do the following after selecting the **arrow tool**:
   Window > Type and Tables > Index and the **Index** box will appear.
   A name that has been indexed will appear off each letter.

Your REAL INDEX pages…
Have one file that contains all your index pages rather than several files containing only one spread each per file. This will make flowing and changing your actual index pages easier.

Do you have a Saver?
A person in the room who every 5-10 minutes shouts "**SAVE**."

You never know when a machine will freeze, the server goes down or power goes off and work will be lost.

Floppy and zip disks often fail.
Avoid making these media a primary source of storing information.

Save your files often and back-up at the end of each session to a secure location, such as a hard drive or server and burn a CD on a regular basis.

This will save you time and frustration if your file becomes corrupt or storage device fails.

and select **Generate Index**. A window will appear - click **OKAY** and the **arrow tool** will turn into a small text box. Click in the top left column and the index entries to that point will flow in that column.

If the column ends before the text, use the "arrow tool," and click on the text once. There will be a red arrow on the bottom right of the column - click on the red arrow with your "arrow tool," and it will turn into a small text box. Click at the top of the next column, and the text will flow into the column. Continue this until there is no red arrow at the bottom of a column.

If you place photos, captions or stories on the *Real Index* pages, leave a column open on each page of the corresponding *Index Book* pages for placing and tagging those names to be in the index.

Check to see if names are indexing correctly.
If there is a correction, go back to the page where that name appears, then using the *arrow tool* or *text tool,* click on the text containing the name needing to be corrected and go to the "Edit in Story Editor" mode.
Edit > Edit in Story Editor
Delete the "tag" that is in front of the name, make the correction, highlight the name and "retag" using the earlier commands.

Do not make a change in the index that has been flowed. It will be overwritten the next time you update the index.
You can make changes in the "Index" box (Window > Type and Tables > Index) and when you run the index it will show the change - but it will not change the name on the page it appears. If Jim Doe on page 42 is changed to John Doe in the "Index" box and the index is updated, the index will show the change, but the name on page 42 will not change.

How fast a book creates an index depends upon the size of the book, number of names tagged and the speed and amount of RAM of the computer.

It can take a few seconds or 20 minutes. If it does take several minutes, run the index after making several tags or changes.

7. **Rerun the index…**
   Generate Index from the **Index** box from the arrow in the upper right and click **Okay**. Use the defaults listed in the generate Index box. One extra box will be checked - Replace existing index.
   Go to the first index page in the *Index Book*. Check the changes and/or additional names added, flow more columns if necessary.

   Continue this process when a spread is complete or at each deadline. Don't wait until the final deadline. This will allow you to check names and how many times someone is appearing in the book.

   If James Smith and Jimmy Smith are the same person, and James is the name of choice, go back to the page where Jimmy appears in the *Index Book* - go to the *Edit in Story Editor* mode of that text box, remove the "tag", change Jimmy to James, highlight the name and retag. After the next time you rerun the index, check for the corrections you made.

8. Yes, you can index multiple names in a column or in a caption where each name is seperated by a comma.

9. **Changing type styles…**
   There are default fonts and sizes for indexing styles. You can find them in the "Styles" box by going to **Window > Type and Tables > Paragraph Styles**. Three index styles will be indicated.
   Index level 1 … names and page numbers
   Index section … the A, B, C between each section of names

Index title … for the word "Index"

To change these, double click on the style name *(Index level 1)* - in the new window that pops up you can change the type style, size and such.

10. **Moving the *Index Book* index to the *Real Index*…**
    If the *Real Index* is from page 300 through 317 - all the pages (300-317) should be in one file, columns in place along with any photos and copy.
    Open both the *Real Index* and the *Index Book*. Go to the first index page of the *Index Book* (page 300), select the **text tool** and click anywhere in the first column of the index, select all, **Edit > Select All**, (all index columns should become highlighted), copy, **Edit > Copy**.

    Switch to the Real Index file, **Window > Real Index (name of other file will be towards the bottom of the box)**, select the **text tool** and click in the first column where the final index will begin and paste, **Edit > Paste**.

    The index will flow to the bottom of the first column. To make it flow into the remaining columns use the **arrow tool**, click on the column with the index and click on the red arrow at the bottom right of the column. This will turn the arrow into a small text box and then click it at the top of the next column where it will flow to the bottom.

    Repeat this step until all columns are filled. To adjust the type styles use the Paragraph Styles - **Window > Type and Tables > Paragraph Styles**