Index Zero:
Frequently Asked Questions about Embedded Indexing

by Pilar Wyman

For this installment of Index Zero, I've provided a mini-FAQ (Frequently Asked Questions) about embedded indexing to help answer recurring questions.

Questions about embedded indexing crop up repeatedly in conversations and on the main Indexer's Discussion Group (IDG) list at io.groups.

While ASI has an FAQ about indexing, which Larry Harrison and I originally put together and updated in 2016, we don't have one for embedded indexing. The Digital Publications Indexing (DPI) SIG website provides resources on embedded indexing, but it also lacks an FAQ about embedded indexing.

These questions were culled from the IDG group discussions and other conversations with indexers.

What is embedded indexing?

"Embedded indexing describes the concept of embedding index entries into the book content."[1] Embedded indexing is back-of-the-book style indexing that is fixed into the book it analyzes.

How is embedded indexing done?

As Lucie Haskins describes in the article cited above, the indexer modifies book files so they include the content of the index as well as the content of the book. In other words, the indexer writes and inserts (embeds) index entries into the book files before final layout. Upon final layout, the index will be generated, listing all the index entries with locators that match the location of the pertinent content in the book, per the indexer's direction. Exactly how the source files are modified depends on the program(s) used by the author or client.

This can be done using various software tools: Word, desktop publishing software such as InDesign, XML, HTML, dedicated embedding software, etc. Many software tools have their own index modules that can be used for preparing and embedding the index. These modules typically lack many features of dedicated indexing software, however.

Professional indexers, including members of ASI, typically use dedicated indexing software to assist with both indexing and embedding.

How does the index get produced after final layout?

Depending on the software the publisher or production house is using, the index is effectively a field or table at the back of the book which will be "generated" (if an InDesign file) or "updated" (if a Word document). Some tools may also call this "compiling." Some software includes style specifications for the index field that you can define. Additional stylistic features can be applied to the index after it has been generated or updated.

What's the best way to embed an index?

It depends on your preferred work tools and what your clients are using. While indexes can be embedded after they're written with the use of additional tools besides dedicated tools like Cindex, SKY, or MACREX, with newer tools like TExtract or Index-Manager you can both write and embed the index directly.

The first step to embedding the index is to find out your client's workflow and what tools they are using.

Can I embed an index I created with Cindex, SKY, or MACREX? If so, how?

Yes. Indexes created with standalone software such as Cindex, SKY, or MACREX can be embedded into book files (check the user's manual for specifics). This can be done manually, via drag-and-drop, or with other tools such as Index-Manager (with which you can also create the index) or Index Convert.

What about cross-references and page ranges? How do those get embedded?

Depending on the software you are using, cross-references are written much the same way as with dedicated indexing software: You compose the text and define the prefix and target as appropriate to the content. Each software's interface is slightly different, of course.

Page ranges can be tricky. In Word, for example, you mark the start and end points of ranges when you embed an index entry. In InDesign, however, you define a page locator or page range, if the locator is the current page (where the index entry is embedded) or if the locator should be a range extending a select number of pages. Again, each software tool handles these details in its own fashion.

Does an embedded index operate differently or look different from a printed, traditional book index?

Generally speaking, no! An embedded book index should look and operate much the same way as a printed book index. The main difference is that in an electronic book with an embedded index you may be able to click on the locators or headings and go directly to the appropriate book content.

Won't the index be automatically linked to the book content in the digital or electronic edition? If not, how do I link it?

The index will be linked to the book content by virtue of having been embedded into it, but it won't necessarily be clickable or interactive upon final publication. If you want readers of the electronic edition to be able to click on the locators and go directly to the text, depending on what ebook conversion software your client is using and how they produced the book there's usually another step you'll have to take. If they used InDesign, and you embedded the index into the InDesign files, the index locators can be made clickable when the book is exported as an EPUB or PDF or electronic book (ebook). If the client used Word or some other software package, additional steps will have to be taken. It's the classic "it depends" answer.

The DPI SIG has resources on this, including Matrix flow charts[2] and lists of tools and brief descriptions.

Do I have to learn about embedded indexing? Why are indexes embedded?

Besides enabling hyperlinking, embedded indexing also facilitates reuse of index material for future editions. With an embedded index, the index for a new edition doesn't need to be (entirely) re-created from scratch. This applies to translation (assuming the embedded index is translated consistently with the text), abridged works, modular texts, etc. And while all such "new" editions do need to have their final indexes reviewed, using embedded indexes can be a real time saver in the overall book production process.

Embedded indexing can also shorten the book production process for first editions as indexing work can proceed before final layout and formatting. Embedded index entries re-flow regardless of changes in page numbers as text is moved around.

As we say on the DPI SIG website, "Despite the benefits of embedded indexing, the publishing industry has been somewhat slow in adopting the method. This is not due to technology obstacles but rather to the need to adopt new publishing workflows."

Many publishers have their own methods of getting linked indexes that do not involve embedded indexing, such as unique or paragraph identifiers (UIDs or PIDs), for example.

Indexers should consider learning embedded indexing if their clients are requesting it. When starting to learn embedded indexing, it's best to learn the tools being used by your clients. Ask your clients what software they are working with in their production workflow so you can learn the appropriate tools.

What tools should I be using for embedded indexing?

If you're not sure what tools to use, the DPI SIG resources include lists of tools and brief descriptions. The main DPI SIG embedded indexing resource page for indexers, Getting Started in Embedded Indexing for Indexers provides an overview of embedded indexing as well as links to Questions for Indexers to Ask Clients and Matrix Flowcharts of Software Tools, Processes, and Outputs.

Where can I learn more about embedded indexing?

The DPI SIG has recently updated all its resource pages. Besides the tools pages listed above, you can also learn more about embedded indexing from the DPI SIG Embedded Indexing Resources page. ■

1. Lucie Haskins, "Jumping on the Embedded Indexing Bandwagon… or Should I?," *The Indexer* 34, no. 2 (2016):54–59.

2. See also Pilar Wyman, Walter Greulich, and Glenda Browne, "Working the Embedded Flow: Matrix Flowchart Update 2022," *Key Words* 30, no. 4 (Winter 2022): 22–25.

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