Working smarter, not harder, with the KPS Indexing Plugins

Lucie Haskins

Lucie Haskins explores in fine detail the plugins developed by Kerntiff Publishing System (KPS) to help in the process of creating an embedded index in InDesign and to aid the professional indexer in handling the interface between indexing using dedicated indexing software and embedding the result in InDesign. Her conclusion? That these plugins enhance the indexing process significantly and are a welcome addition to the tools available to anyone working with embedded indexing in InDesign.

Introduction

Kerntiff Publishing Systems (KPS)[1] specializes in Adobe InDesign plugins and Quark XTension development. Rich Bines, based in the United Kingdom, is the mastermind behind these tools in addition to providing development and support.

The plugins/scripts are aimed at two markets. The first is the professional indexer who simply wants to get an index embedded quickly into InDesign and might want to make some changes afterwards. The second market is the publisher who does not have dedicated indexing software (DIS)[2] and wants to create indexes using search patterns and later edit those indexes.

The KPS plugins are all add-ons to InDesign, either providing features missing from InDesign's native indexing module or strongly augmenting existing (but deficient) InDesign indexing features. Of particular interest for the purposes of this review is the KPS bundle of 15 separate utilities grouped within three distinct offerings: the Index Utilities suite, the Index ToolTip plugin and the PDF Index Stickies plugin.

As preparation for this article, I learned how to use each plugin and encountered two significant difficulties:

- The fact that these plugins provide a wide spectrum of functions proved to be both a blessing and a curse. I found my biggest hurdle was sorting out which plugin did what and how it was relevant to my indexing process.
- Many of the plugins are not intuitive to use, and documentation is somewhat sketchy and scattered throughout the website. This can lead to frustration and wasted effort when learning how to use them.

In an effort to organize my thoughts and review process, I found myself asking, which plugins might be the most useful for me? How do they actually work? Do any of them work together? If so, how? I categorized the plugins under the major functions they served and created a table (Table 1):

- creating indexes
- importing existing indexes
- editing index entries
- navigating through, searching for, or viewing index entries
- exporting or hyperlinking indexes.

Therefore, I have organized the remainder of this article around these five functional categories. I hope that with Table 1 and the discussion that follows, the reader will come away with an appreciation of what the KPS toolkit has to offer indexers and a basic understanding of how actually to use each of these plugins.

For readers interested in a more detailed discussion of this topic, such as step-by-step instructions for each plugin, please visit my website[3] for a companion piece to this article.

Index Utilities (IU) plugin suite

This suite of plugins (Figure 1) contains the main collection of plugins and scripts for indexing in InDesign, and is available for Mac/Win InDesign CS 5, 5.5 and 6. Support will also be provided for the InDesign CC release. This suite of plugins can be purchased via the KPS website for UK£50.

To install, download the files and insert them into the appropriate InDesign Plugins folder. (Each IU suite is version specific, so each version of InDesign requires a separate purchase specific to that version.)

Use Edit/Preferences/IndexUtilities to customize column widths for the various plugin windows and the color of the active field in those windows.

Note: As with indexing using InDesign's native indexing module, KPS plugins also slow down as indexes increase in size. The KPS website advises that the tipping point for KPS plugins is around the 1,000-entry mark.
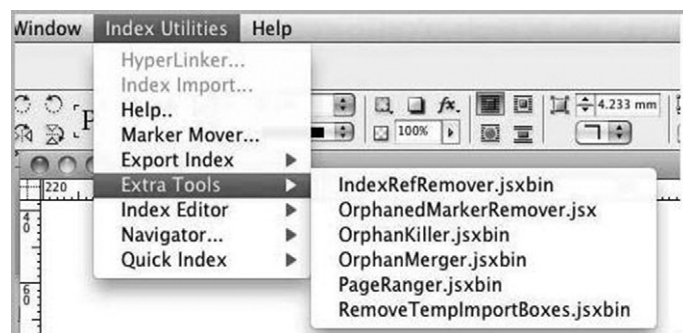

Figure 1 Index Utilities plugin

Table 1 KPS indexing-related plugins

Creating indexes	
Quick Index* and Quick Index Search*	Convenient way to add index markers in InDesign. The floating palette is automatically populated from the current selection.
Importing existing indexes	
Index Import*	Builds an InDesign index from an external index created in dedicated indexing software (CINDEX, Macrex (soon), SKY Index).
Marker Mover*	Moves InDesign embedded markers to a new position on the InDesign page. Particularly useful after using Index Import.
Remove Temp Import Boxes**	Cleans up/removes the temporary text frames after an index has been imported and index entries have been moved to a specific page location during the Marker Mover process.
Editing index entries	
Index Editor*	Displays a palette to help edit InDesign embedded indexes. The list can be arranged in page number or alpha order.
Index Ref Remover**	Clears files of ALL existing embedded index markers.
Orphaned Marker Remover**	Compares and displays selected index against the InDesign embedded index markers.
Orphan Killer**	Removes all orphan subentries within the index.
Orphan Merger**	Joins the subentry to the main heading.
Page Ranger**	Condenses page numbers (example: from 11, 12, 13 to 11-13).
Navigating through, searching for, or viewing index entries	
Index Navigator*	Displays index markers on the page as a clickable list that can be arranged in page number or alpha order.
Index ToolTip	Displays the contents of an InDesign index marker (in a tooltip bubble) when the mouse hovers over an index marker.
PDF InDex Stickies	Exports content of index markers to interactive PDF.
Quick Index Search*	Searches existing index entries by words, paragraph style, or character style. Search results can then be used to create new index entries.
Index Editor*	Searches existing index entries by words and lists the results. Index entries contained on that list can be jumped to and/or modified as desired.
Exporting or hyperlinking indexes	
HyperLinker*	Creates hyperlinks to an existing InDesign index.
Export Index*	Creates a tab delimited file ready for importing to a dedicated indexing software (CINDEX, Macrex, or SKY Index). Flexibility in exporting from one (ExportIndexTAB) to multiple chapters (MultiIndexExport) at a time.

*   Part of the IndexUtilities suite of plugins.
** Part of the ExtraTools suite of plugins (which are part of the IndexUtilities suite).

Creating indexes

Historically, embedded indexing in desktop publishing (DTP) packages such as InDesign and FrameMaker has always been considerably more labor-intensive and time-consuming than using DIS. The DTP indexing tools often seem quite functional on the surface, and it is only when indexers start working with them that they discover the absence of shortcut keys, or that complex steps are required to accomplish the equivalent of simple DIS tasks, such as capturing entries in a variety of methods, duplicating entries, flipping entries, or swapping main and subentries.

Efficiency and speed are the name of the game, and well-designed software enables indexers continually to improve their performance. But when tools are difficult to use or designed without understanding the indexing process, using them can become an exercise in endurance and futility. To avoid this and ensure that the KPS plugins would offer exceptional efficiencies, Rich Bines worked with multiple indexers as he developed his tool suite. He especially credits Jill Edwards in helping him learn how indexers worked and what features were most valuable for various processes. Quick Index (QI) and Quick Index Search (QIS) (as well as Index Editor, Export Index, and Index Import) are the useful culmination of that collaboration.
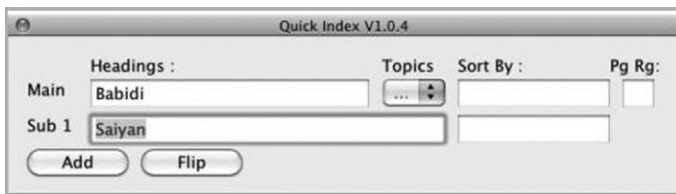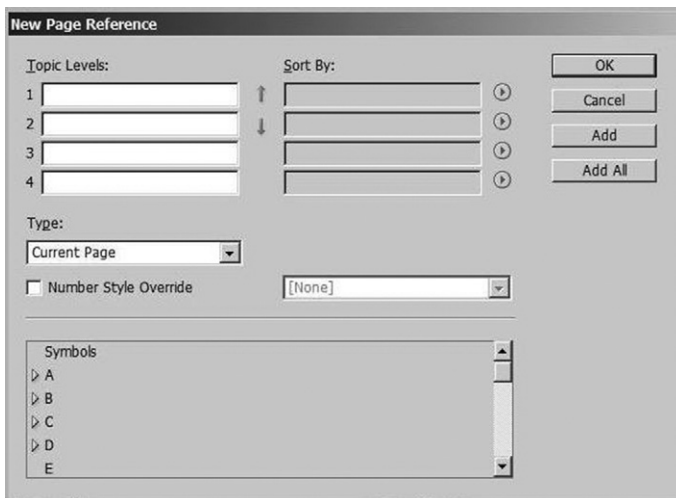
Figure 2 Quick Index

Figure 3 InDesign's New Page Reference dialog box

Quick Index and Quick Index Search

QI and QIS are part of the purchased Index Utilities package. (QIS is also available as a free standalone download. The free version does not include the ability to display extra subfields.) QI is accessed via the Index Utilities menu and provides two options.

The QI dialog box (Figure 2) is a useful alternative to InDesign's New Page Reference dialog box (Figure 3). While the New Page Reference dialog box does provide a lot of functionality – keying in entries, swapping entries, duplicating entries – it comes with a heavy price. It is difficult to avoid mouse work and multiple keystrokes for most

Figure 4 Quick Index Search

entries. And over time, these additional keystrokes slow down overall efficiency and speed.

Saving keystrokes is a significant benefit of using QI. In addition to manually adding entries quickly (by automatically filling the entry with highlighted text), QI can add all occurrences of a search based on paragraph (headings) or character (italicized terms) styles. QI can also duplicate existing index entries and flip main/subentries more efficiently than native InDesign. It can swap acronyms, a feature beyond InDesign's capabilities. And, while KPS plugins may require some mouse work, in many of the plugins, shortcut keys can be set for specific buttons. In QI, for example, both the Add and Flip buttons can be set to customized shortcut keys.

The QIS dialog box (Figure 4) supports all of QI functionality and adds significant search capability, making it an even better alternative. The KPS website provides full documentation for each QIS dialog box field.

I found both these plugins more efficient and more functional than the New Page Reference dialog box. They are worth trying out to see if one of them works better with your current indexing process.

Importing existing indexes

KPS provides Index Import, Marker Mover, and Remove Temp Import Boxes plugins to import indexes (in a three-step process) into InDesign from dedicated indexing software. The process is quite complex, but worthwhile. (All three plugins are part of the purchased Index Utilities package.)

Again, the overview below is merely an introduction to the functionality of each plugin. Those interested in learning more can read the companion piece on my website[3] for step-by-step instructions.

Index Import

Index Import (II) (Figure 5) is part of the purchased Index Utilities package. II is accessed via the Index Utilities menu.

II provides the extraordinary capability of taking an index created by dedicated indexing software and importing (embedding) it at the page level (Figure 6 shows a temporary marker box) directly into InDesign. Indexers can create their indexes in their favorite DIS first, using all the editing and sorting features such software makes possible, and then embed their edited index directly into InDesign files using II.

Forced sorting and cross-references are not imported (because of InDesign's unique handling of these elements) and will need to be re-added manually after the import process has completed.

There are quite a few steps, from ensuring the DIS output file is properly formatted, to importing the output file into a new document in InDesign, and invoking Index Import to parse the index entries to temporary boxes at the page level in the appropriate InDesign INDD files.
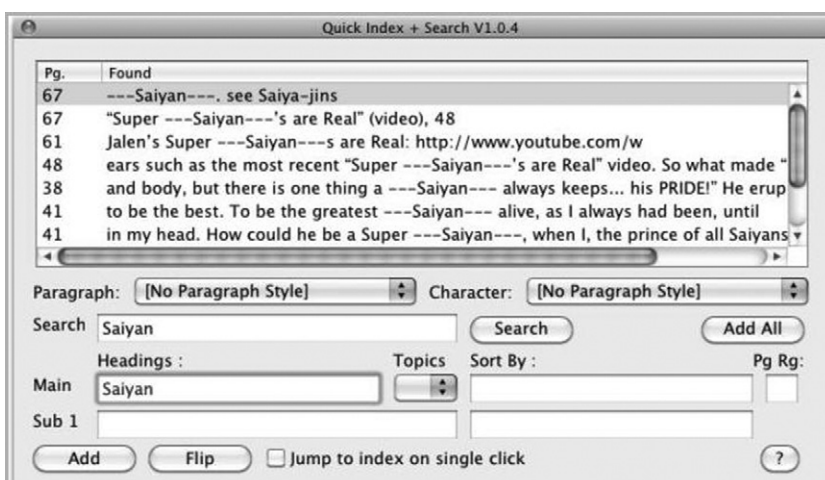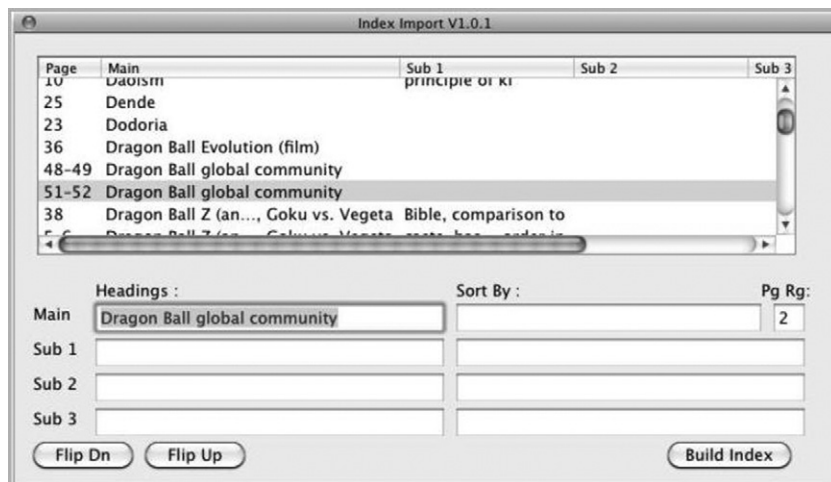
This process is worth the effort. How else

Figure 5 Index Import

can you combine the ability to use your dedicated indexing software to create a masterful index and then embed it relatively painlessly and quickly? (The KPS website provides a five-minute video that demonstrates both II and Hyper-Linker (HyperIndex).)

Marker Mover

Marker Mover (MM) is part of the purchased Index Utilities package. Using MM during the import process, the newly
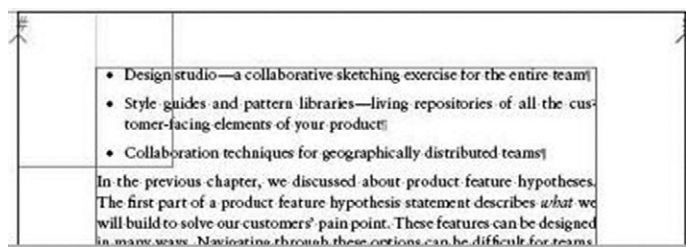

Figure 6 Temp Import box with markers (top left corner)
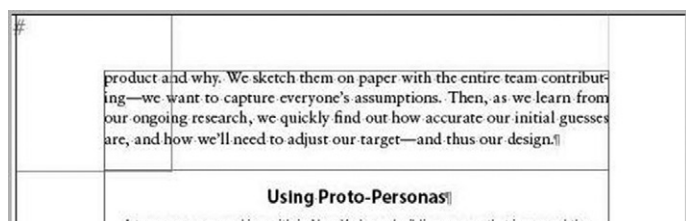

Figure 7 Marker Mover

Figure 8 Empty Temp Import box (top left corner)

embedded markers can be moved from their default import location (within the temporary boxes; Figure 6) to a more appropriate location within the same page (Figure 7).

Outside the import process, MM can also move any index markers from one location to another within the same page without having to first delete and then re-add the index entry (as would be the case with native InDesign indexing).

Remove Temp Import Boxes

Remove Temp Import Boxes (RTIB) resides on the Extra Tools menu, and can be used to remove the temporary text frames that were created for the import process. There is no dialog box associated with RTIB: simply select it to invoke the process. A completion message pops up when it has finished.

Even though the empty temporary text frames (Figure 8) do not interfere with or distort any content in the INDD files, clients might be confused by them so they should be removed as a courtesy.

Editing index entries

Editing index entries is an important aspect of any indexing process, and KPS provides a robust solution for editing index entries with the sophisticated Index Editor (IE) as well as several Extra Tools plugins that perform single, specialized functions.

Index Editor

IE (Figure 9) is part of the purchased Index Utilities package. IE allows indexers to quickly edit an existing InDesign index (in either alphabetical or page order) to (1) correct spelling of main and subentries and propagate the changes to all identical main or subheadings; (2) add subheadings; (3) add new entries; (4) change or add page ranges; (5) create new entries by flipping the main and subheadings or swapping acronyms and spelled-out text; and (6) move index markers to a new location within the same page by placing the cursor at the new location and holding the Alt key when clicking Update; or (7) delete existing index entries. Changes made to the embedded index markers using IE are reflected immediately in the InDesign Index Palette (Figure 16).

I noticed a lot of overlapping functionality between IE and Index Navigator. Determining which features are most useful to you will establish which plugin you use most often.

Index Ref Remover

Index Ref Remover (IRR) can be executed from the Extra Tools menu. It clears files of *all* existing embedded index markers, leaving the files completely free of index entries.
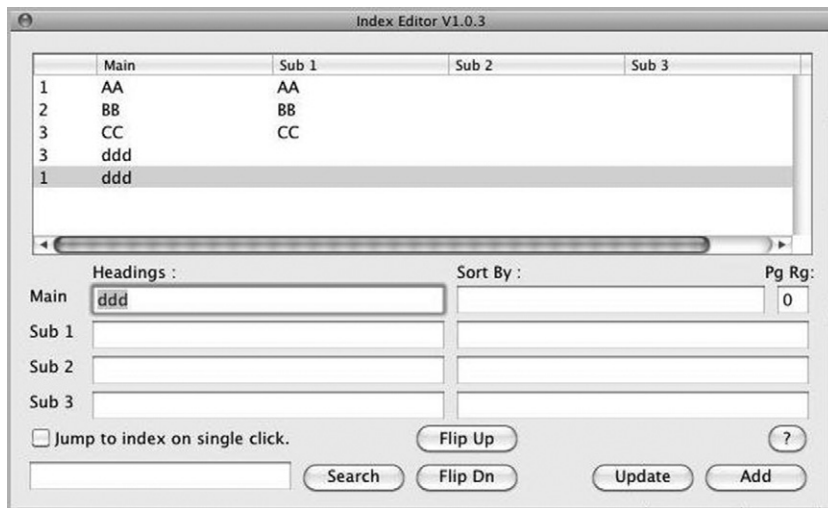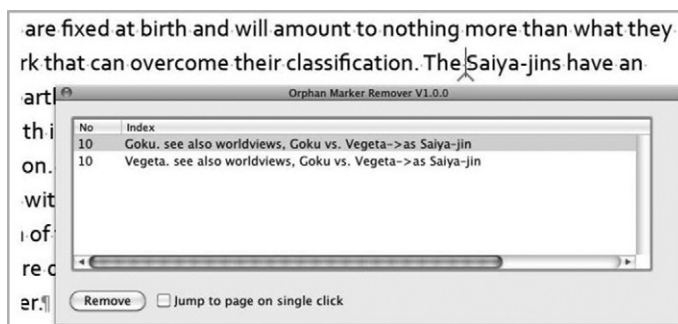
Figure 9 Index Editor

Figure 10 Orphaned Marker Remover

This is extremely handy when INDD files contain embedded index markers from client testing or previous editions that were not completely cleaned out.

IRR does not remove cross-reference markers since InDesign handles these types of index entries differently. Cross-references are easily removed manually via InDesign's Index Palette. Just click IRR on ... and it completes. There are no windows associated with this plugin.
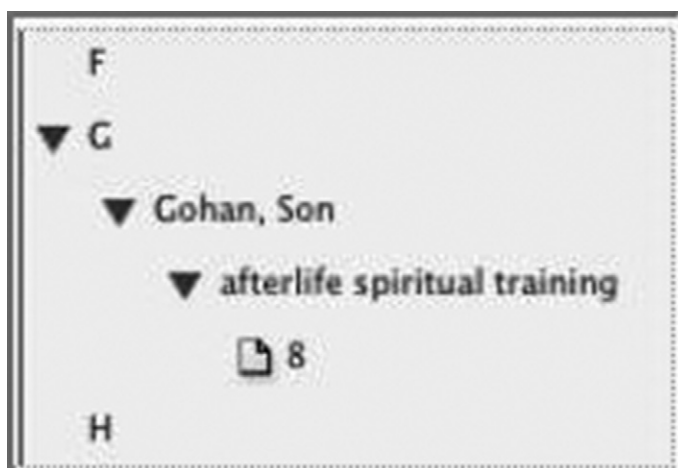
Orphaned Marker Remover

Orphaned Marker Remover (OMR) (Figure 10) is executed from the Extra Tools menu. OMR scans the selected index, comparing it against the InDesign embedded index markers and displays a list containing the markers that are not present in the index. You have the option to remove the orphaned index marker. (Orphaned in this plugin indicates an index marker that does not also exist as an entry in the generated index.)

Orphan markers only appear after index has been generated (created or updated with changes). For example, if you deleted an index entry from the generated index itself, the InDesign embedded index marker would still exist as a record. However, it would no longer have a pointer to it from the generated index. This orphan record can easily be eliminated by deleting it via Index Editor or the native InDesign Index Palette. Using OMR, you can delete entries from the index itself and then run OMR to ensure that the now orphaned markers are also deleted.

Orphan Killer

Orphan Killer (OK) is executed from the Extra Tools menu. (Orphan in this plugin indicates a main entry with only one subentry.) OK removes all orphan subentries within the index (see Figures 11 and 12). There are no windows associated with this plugin. Actions cannot be undone.

Orphan Merger

Orphan Merger (OM) is executed from the Extra Tools menu. (Orphan in this plugin indicates a main entry with only one subentry.) OM removes all orphan subentries within the index by joining the subentry to the main entry. (See Figures 13 and 14.) There are no windows associated with this plugin. Actions cannot be undone.

Page Ranger

Page Ranger (PR) is executed from the Extra Tools menu, and condenses (conflates) page numbers. For example,

Figure 11 Before Orphan Killer

Figure 12 After Orphan Killer
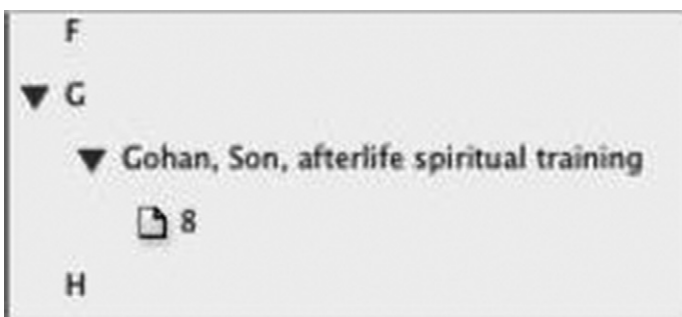
Figure 13 Before Orphan Merger

Figure 14 After Orphan Merger

Aardvark, 1, 2, 3, 4, 9, 21, 22, 23, 24 becomes Aardvark 1–4, 9, 21–24 (assuming that that is what the indexer wants). There are no windows associated with this plugin. Actions cannot be undone.

Navigating through, searching for, or viewing index entries

Being able to view, navigate through, and search for existing index entries are essential functions for all indexers as they go about the creative process of structuring the index framework, but they are functions sadly deficient in most embedded indexing programs. All the plugins in this category provide impressive functionality and warrant a serious look.
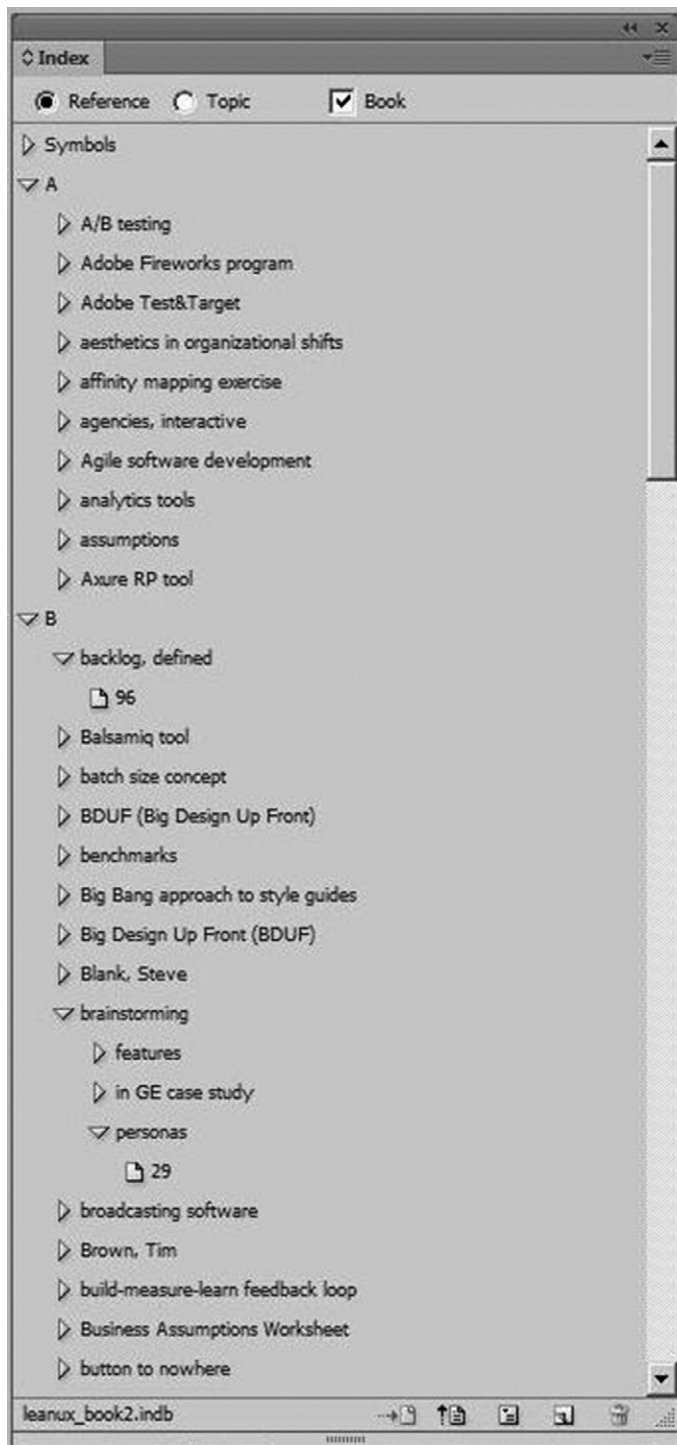

Figure 15 Index Navigator

Figure 16 The native InDesign Index palette

Index Navigator

Index Navigator (IN) (Figure 15) is part of the purchased Index Utilities package or available as a free standalone download. IN allows you to navigate the index (faster and more powerfully than using the native InDesign Index Palette, Figure 16) to view index entries in either page number or alphabetical order. IN is especially useful if you are trying to remember how you previously entered a topic. I noticed a lot of overlapping functionality between IN and IE.
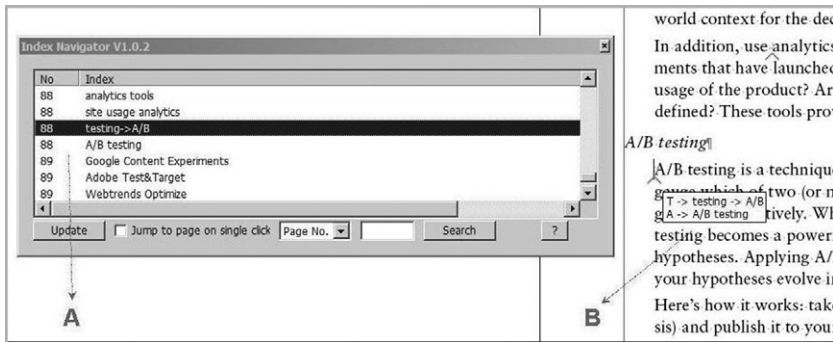
Figure 17 Index ToolTip plugin (shown on right)

Determining which features are most useful to you will establish which plugin you use most often.

Quick Index Search

QIS (also discussed under 'Creating indexes') can be used for multifaceted search capability within index entries.

Index Editor

IE (also discussed under 'Editing index entries') can be used for searching within index entries.

Index Tooltip plugin

Index Tooltip (IT) is completely independent of the Index Utilities suite of plugins and can be purchased separately from the KPS website for UK£15. Install IT by copying the IndexToolTip folder to the InDesign plugins folder and restarting InDesign. IT displays the contents of InDesign index marker(s) (in a tooltip bubble) when the mouse hovers over the index marker (blue caret). See Figure 17.

Use Edit/Preferences/IndexToolTip to activate or deactivate this plugin as well as to designate the number of characters to include when searching for multiple index markers at the same location.

PDF Index Stickies plugin

PDF Index Stickies (PIS) is completely independent of the Index Utilities suite of plugins and exports index
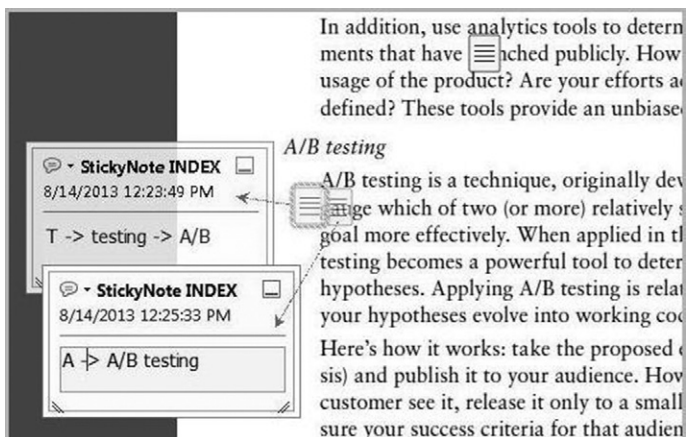

Figure 18 PDF Index Stickies plugin

markers to interactive PDF (Figure 18). PIS can be purchased separately from the KPS website for UK£30. (Do not confuse this plugin with the similarly named but vastly different PDF Stickies plugin also available on the KPS website.) Install PIS by copying the PDF IndexStickies folder to the InDesign plugins folder and restarting InDesign. Use Edit/ Preferences/PDFIndexStickies to activate or deactivate this plugin.

Exporting or hyperlinking indexes

Once again, KPS plugins provide functionality currently missing in InDesign's native indexing module. (InDesign provides this capability natively starting with version CC. However, earlier InDesign releases do not.)

HyperLinker/HyperIndex

HyperLinker/HyperIndex (HH) is part of the purchased Index Utilities package, and creates hyperlinks to existing InDesign indexes in PDF and ePub formats. (The KPS website provides a five-minute video that demonstrates both Index Import and HyperLinker.) Preparing an index for hyperlinking depends on how the index was created.

1 For indexes created with dedicated indexing software:
   a Format and save the DIS index (for output) to InDesign.
   b Open all InDesign documents connected to the index.
   c 'Place' the DIS index file into a new InDesign document (using the File/Place command).
   d Use the Index Import / Marker Mover process to embed the index entries.
   e Select the content of the text frames containing the index and launch HH.
2 Indexes generated natively in InDesign must first be disconnected from InDesign. (The easiest way to do this is to create the index in a temporary text frame and then copy and paste the index into the desired text frames and then run HH):
   a Open all the documents connected to the index.
   b Create the InDesign index in a temporary text frame and then copy it to the desired index pages.
   c Select the content of the text frames containing the copied index and launch HH.

HH displays three progress bars while building the index (Figure 19). An alert displays once the index has been hyperlinked. Once hyperlinked, the index will export to PDF or ePUB. HH can work on single documents or entire books.

Export Index

Export Index (EI) is part of the purchased Index Utilities package, and exports InDesign indexes into tab-delimited files for import into DIS such as CINDEX, Macrex, and SKY Index. EI is versatile, exporting one chapter or multiple
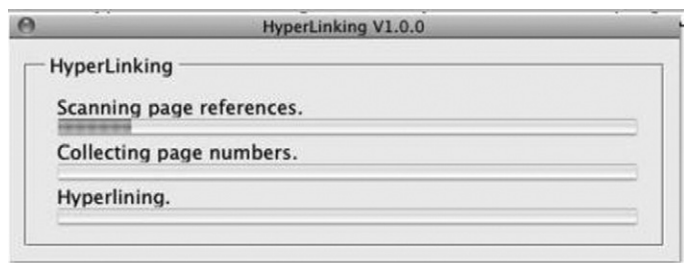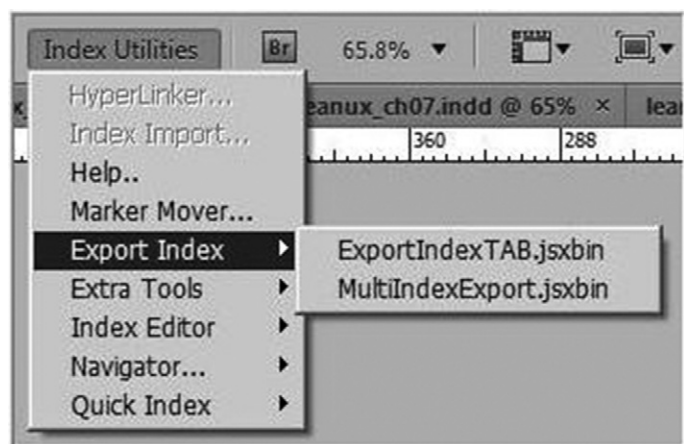
Figure 19 HyperLinker (HyperIndex)

Figure 20 Export Index

chapters at a time. Figure 20 displays the two options for the export process. Export Index TAB exports one chapter (focus on a chapter file) at a time. Multi Index Export exports all open chapters.

As with the import process, the export process does not bring across forced sorting instructions (InDesign 'sort as') nor does it include cross-references. Special characters (such as non-standard hyphens and quotation marks) do not convert as expected into the DIS files so a translation table (Figure 21) is provided for identifying these characters and providing the substitute character for EI to use.
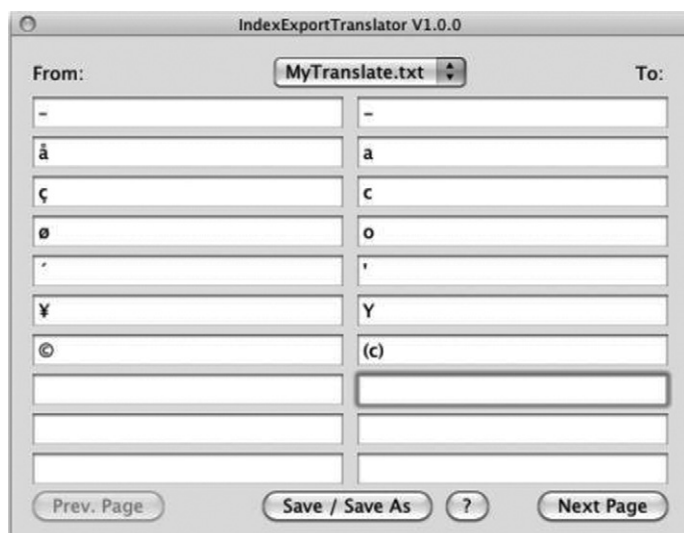
Conclusion

I consider these KPS plugins to be a welcome and valuable addition to embedded indexing with InDesign. I found myself reaching for the IN and IE plugins surprisingly often. I appreciated the additional ways that these (and the other) KPS plugins provided opportunities for me to explore and view my indexes as I was building them.

Of course, it is up to you to decide which (if any) plugins to use, and how to fit them into your embedded indexing process. Admittedly, there are challenges to overcome, such as the scattered and inconsistent documentation and the large number of plugins to familiarize yourself with. But you should seriously consider incorporating these hard-working plugins into your InDesign indexing routines.

All in all, I consider these plugins worth purchasing because they enhance the indexing process significantly. The plugins are still maturing and they can only improve from here. But they already fit my mantra of 'work smarter, not harder'!

If you are still sitting on the fence, download the free plugins (QIS and IN) and try them out before you decide to commit to the full package.

In closing, I would like to thank to all the generous indexers who graciously answered my multitude of questions about these plugins as I familiarized myself with them, and especially Jill Edwards and Mary Harper.[4] We as indexers are truly blessed with the generous souls populating our special niche.

Notes

1 www.kerntiff.co.uk
2 The term dedicated indexing software (DIS) was first coined by Rich Bines and Jill Edwards, and refers to indexing software such as Cindex, Macrex, and Sky.
3 http://luciehaskins.com/resources.shtml
4 Jill Edwards can be found at Snowshoe Lane Indexing (http://snowshoelane.com) and Mary Harper can be found at Access Points Indexing (www.accesspointsindexing.com).

Lucie Haskins became an indexer in 2000 after a long career in corporate America, with roles spanning the computer industry and management consulting. She specializes in embedded indexing and in computer- and business-related topics, and enjoys discovering and applying tools that optimize her indexing process. She believes strongly in giving back to a profession that has been so generous to her, and has presented workshops on various indexing topics, instructed for UC Berkeley's online indexing course, and served ASI in chapter and national positions as well as on its webmaster team. Email: luciehaskins@gmail.com

Figure 21 Translation table