

# Custom InDesign Tables of Contents

Sometimes you need a complex table of contents or index that can't be easily generated using InDesign's built-in Table of Contents command. I call these "referenced files" because they contain content extracted from your documents or book. During this webinar, I will demonstrate a simple workflow for generating up-to-date reference files using XML, XSLT, and InDesign Tagged Text.

## Overview of the document set

This is a very consistent set consisting of 11 InDesign chapters organized into an InDesign book. Each chapter deals with one type of medical imaging category (Breast, Nuclear Medicine, etc.). Within each chapter are 16 "cases" divided into 4 subcategories, each presented by a different medical technician.

## Required contents and appendix

Material from the main chapters needs to be extracted and presented in Contents and Appendix documents. For many publications, you could use InDesign's native Table of Contents feature to get the information you need for the Contents and Appendix. But in this case, the client wants the information organized differently than the "document order" presentation of a normal Table of Contents.

## Understanding the process

Here is the step-by-step process I am using so you can understand how it works. Keep in mind, though, that the production process is mostly automated and very simple for the user. Here are the basic steps for each document:

- Show hidden conditional text so relevant content can be extracted.
- Map InDesign styles to XML tags.
- Export the XML from InDesign.

A script is used to perform the three steps on all of the documents in the book at once.

## Transforming the XML

This is where we take the XML and extract the desired content for our Contents and Appendix. We use XSLT to do this. XSLT stands for Extensible Stylesheet Language Transformations and is a language for transforming XML into other formats. It is a W3C standard that has been in use since the late 90s.

We used the Oxygen Developer IDE to develop the XSLT scripts. It looks complicated, but the final process is pretty much push-button for the user and does not require an XML IDE. But it is useful to know what is going on under the hood. We do this in three stages for each desired output:

- Develop a transformation (known as a "stylesheet" in XSLT parlance) from the InDesign XML to a simple XML structure that we can examine to make sure we have the desired output.

- Export an example InDesign document (for example, the desired Contents and Appendix) to InDesign Tagged text.
- Modify the XSLT stylesheet so that it converts the XML to the required InDesign Tagged Text output.

## **Import the Tagged Text into the final InDesign file**

The final (and exciting) stage is to place the Tagged Text file into your InDesign layout. If everything has gone right, you will see fully-formatted text containing the desired referenced content from your book! Whenever you make a change to your book and need to update your referenced files, just repeat the process.

## **Why I like InDesign Tagged Text**

InDesign has the capability to import XML and format it in InDesign so you may wonder why I use Tagged Text instead of XML for the reference content.

- Apply formatting to imported XML can be tricky but it is straight forward with Tagged Text.
- You can export an example of your desired output to Tagged Text and “reverse engineer” it for use in your transformation. You don’t need to learn the syntax.
- It typically imports faster than XML, especially for larger documents.
- Once it is imported into your document it can be edited and styled just like any other InDesign text. There are no XML tags attached to it.

## **Webinar follow-up**

Please leave any questions or comments about the webinar at the webinar blog post: <http://frameautomation.com/indesign-toc-webinar/>. Please contact me if you are interested in exploring a custom solution for your InDesign files.

## **About the presenter**

Rick Quatro is president of Carmen Publishing Inc. and has been working with Adobe FrameMaker since 1993 and InDesign since its initial release in 1999. Rick specializes in automation workflows for the technical publishing community. His services include automation through scripting, XML/XSLT workflows, database publishing, ebooks, and conversions.

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