Indexing in FrameMaker Without Tearing Your Hair Out

by Lucie Haskins

Well, maybe some hair loss isn't avoidable but, with the availability of two plug-ins, emDEX and IXgen, and other techniques, embedded indexing has become much more manageable.

Indexing in FrameMaker has some similarities to indexing back-of-the-book style. I read the pages, I create index entries, and I edit the index.

However, instead of reading hard-copy pages, I read the FrameMaker files that are provided by my clients. I create the index entries by positioning my cursor at the appropriate spot in the FramerMaker file itself and then creating the index entry in the Framemaker marker box.

I follow this process until I have added all the index markers into the files. I then generate the index and edit/massage the index into its final shape. This is a very painstaking and tedious process.

Some of FrameMaker's embedded indexing shortcomings

FrameMaker functionality for indexing is very rudimentary and doesn't provide the features that reduce input and/or editing time and effort. Shortcomings include:

- tiny marker box size and tiny font size
- minimal marker box functionality
- no index preview
- no entry autocompletion
- no change propagation
- no temporary grouping

As you can see, FrameMaker does not provide much of the functionality that indexers expect with their dedicated indexing software. FrameMaker seems to have the mindset that once an index entry is created, it is in its final form and no further manipulation is needed for it.

In the following sections I have provided an overview of where I use emDEX and IXgen (and sometimes other techniques) to work around the shortcomings mentioned above.

IXgen and emDEX functionality

IXgen and emDEX are third-party plug-ins for FrameMaker that work independently of each other. (*See* the Additional Information section for links to these products' web sites.)

IXgen and emDEX do not provide all the functionality available with dedicated indexing software, but they are a lot better than trying to index with FrameMaker alone. Time is money and any time saved is worth the relatively small purchase price for these two plug-ins.

Once installed, these plug-in functions are accessed via drop-down lists off the FrameMaker main toolbar. I can use one or both plug-ins at the same time. The plug-ins complement each other. I use both, for different purposes and at different times.

Figure 1: IXgen and emDEX as they appear on the FrameMaker main toolbar after installation.

Marker box size

I have found that emDEX (especially the current 2.0 version) is most suitable for helping with my data entry needs. The ability to enlarge the marker box and, more importantly, the text in the marker box is invaluable. I can actually see what I am typing because I can enlarge the font size to whatever my eyesight requires.

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Working late at night was horrible before this functionality was available. In figures 2 and 3, below, notice the side-by-side comparison of the marker box sizes and font sizes. The emDEX marker box and font size can be enlarged even further if necessary.

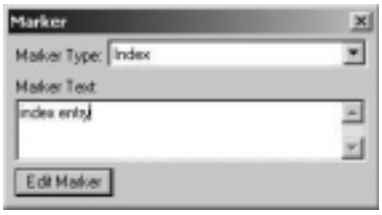

Figure 2. The FrameMaker marker box.

Figure 3. The emDex marker box.

Marker box functionality

The emDEX marker box (figure 3) contains a ***delete button*** to delete existing markers. I did not think I was going to use this feature extensively but have found it to be quite a timesaver when doing my final editing passes and when I need to get rid of markers quickly. Deleting markers the "old" way had been more cumbersome than I had realized.

When italics or bold formats need to be applied in FrameMaker, special codes have to be manually entered around the affected text. When the index entry is part of a page range, start range and end range codes need to be manually inserted into the marker box. Cross references require special coding also. FrameMaker provides no functionality to reduce the tedium of inserting these style codes manually.

However, emDEX 2.0 provides ***customizable radio buttons*** within its marker box. I can have long strings for <Emphasis>, <Default Para Font>, <$startrange>, <$endrange>, <$nopage>, and so on (up to 10 strings) predefined and available to insert in my marker box with the click of a button or shortcut key.

This feature was exceptionally helpful this past year with one client who used so many different style codes that I had to include codes in just about every marker box. Imagine what that would have been like without emDEX's capability!

*Figure 4. emDEX provides the ability to customize up to ten radio buttons in the emDEX marker box. (*See *figure 3 to view the radio buttons defined here.)*

Index preview

In FrameMaker, I cannot see the index as it is being built. When I create an index entry, I do so through the index marker box (figure 1 or 3). Once the index entry is created, it is written (embedded) in the FrameMaker file and disappears from the marker box. If I want to see how that entry looks in the index, I have to take a separate step and generate the index.

Because I cannot see the index, I often do not remember the exact wording or spelling of previous index entries, and I often forget how I constructed them. Then, I end up using slightly different phrasing or wording for subsequent index entries. These slight variations build up, and then require cleanup at the editing stage. This is a major drawback.

However, emDEX provides a special window to show the index as it is being built (figure 5). If I invoke the option to automatically update the emDEX window as I enter index entries, I can see my index as I am building it. It is wonderful to have visual verification of what is going on!

There is a caveat on using this feature: The larger the index file, the slower this process works. To get around this problem, once I have indexed several chapters and am relatively comfortable with my term selection, I often do not bother to use this feature at the book level. However, I do use it extensively at the chapter or file level, where I can see all the entries I have created for a specific chapter or file, and where the index size does not get large enough to cause performance problems.

Figure 5. The emDEX window that shows an index as it is being built.

I have found that I also do quite a bit of editing from this window during the input process. The window provides a "jump" capability from the "selected" index entry to the actual index marker in the FrameMaker file. Editing as I go saves on editing time down the road.

Viewing index entries right in the document text

IXgen takes a different approach to making the index entries "visible."

With IXgen, I can view (and edit) markers right in the document text through the "expand markers" and "collapse markers" functions (*see* figure 6, next page).

This feature is especially helpful when checking a section of the file to review what I have already done in that section.

Entry autocompletion

FrameMaker treats every index entry that I create independently of any other index entry. That is, FrameMaker does not provide autocomplete suggestions for the entries I type into the marker box. I either have to remember what I typed previously or generate the index to see the previous entry.

Unfortunately, no magic bullet exists with either IXgen or emDEX to help in this area. The best solution that I've come up with to-date is to be as vigilant as possible when entering information. I use the emDEX window for previewing.

I also rely on online post-it notes (*see* Additional Information) to copy and paste terms that I think might bear watching. Because I have a dual-monitor setup (figure 7), I "paste" my post-it notes all over my ancillary screen (where they are always visible) while I index in my main screen.

When I need that term again, I simply copy it from the post-it note and paste it inside the marker box. It really saves on typing for large or difficult-to-spell words. (Caveat from sad experience: do *not* place an online post-it note inside a FrameMaker file. It will corrupt the file and the file, once closed, will not be editable.)

Embedded Indexing

Figure 6. The IXgen expand markers feature at work.

Change propagation

FrameMaker allows you to edit only one index marker at a time. Any changes made to one index marker do not propagate (or cascade) to the related markers. For example, if I need to edit the main heading of a group of records for the InfoPath example above right, only the record I update will reflect the changes. Other related records will still need to be updated individually. Because some of the records in this example also contain page ranges, each portion of the page range would need to be updated individually.

Old version:

InfoPath
- defined 215
- Excel and 225-227
- generating HTML output 261-263
- linking forms 230-236, 245-247
- populating controls 236-239
- scripts and 243-245, 247-255
- sharing data 227-230

New version:

InfoPath (Microsoft)
- defined 215
- Excel and 225-227
- generating HTML output 261-263
- linking forms 230-236, 245-247
- populating controls 236-239
- scripts and 243-245, 247-255
- sharing data 227-230

In other words, this example would require seventeen separate edits. Each page locator identifies a separate record.

While emDEX and IXgen do not propagate changes, they do provide the much needed ability to view multiple markers at one time. This is the next best thing to having changes cascade down the impacted records.

Especially helpful is IXgen's Editable Marker List (figure 8), which provides a view of all markers at the book level or selected markers at the file level. Markers are copied into an IXgen table where I can edit multiple entries one at a time (but regarded by IXgen as one overall task). When I finish editing the IXgen table, I then apply the changes.

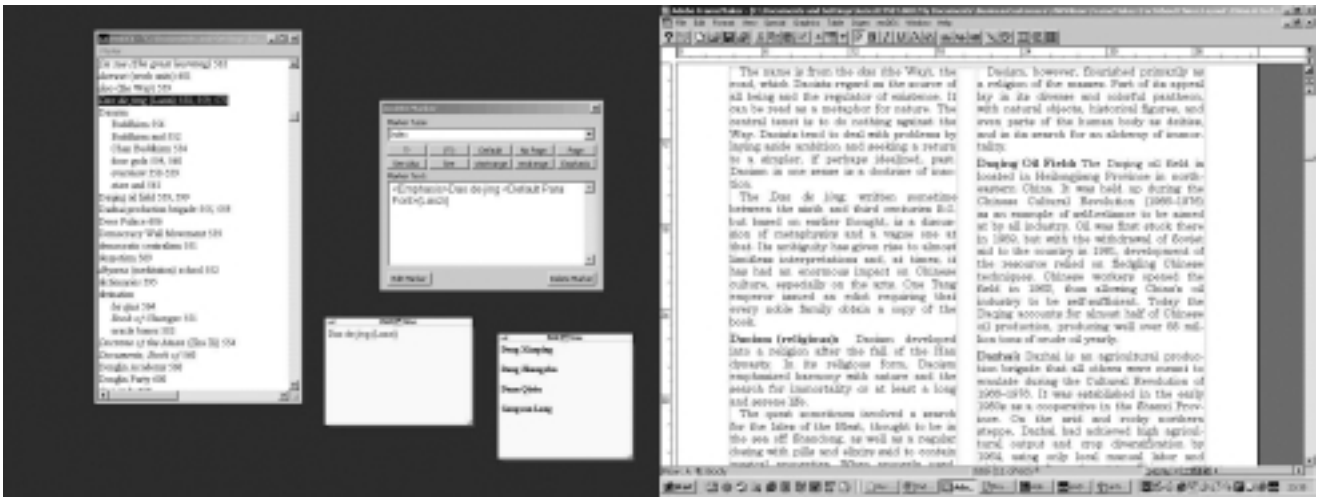

Figure 7. The author's dual-monitor setup, with post-it notes, emDEX window, and emDEX marker box on an ancillary screen and a FrameMaker file open in the main monitor.

IXgen, behind the scenes, updates the affected index markers in the FrameMaker files.

I use this feature heavily during my final editing pass.

Figure 8. IXgen's Editable Marker List, that allows editing more than one index entry at a time.

Temporary grouping

FrameMaker provides no ability to temporarily group index entries. Unfortunately, neither do emDEX nor IXgen. The next-best thing is using FrameMaker's Find/Change function (figure 9) within IXgen's Editable Marker List.

I invoke Find/Replace searches as many times as necessary to find similar concepts.

Figure 9. The FrameMaker Find/Change box.

Conclusion

You can imagine how time-consuming indexing in FrameMaker can be. Therefore, any time that I can save anywhere in the process, helps in the long run. And, while helpful, emDEX and IXgen do not make up for all of FrameMaker's embedded indexing shortcomings.

Even with these labor-saving devices, embedding index markers in FrameMaker typically takes at least 50% longer than producing equivalent back-of-the-book indexes.

I have gotten speedier in my work efforts, from 5 pages an hour in 2000 to over 11 pages an hour this year. I am convinced that this increase in speed and efficiency is due to my use of emDEX and IXgen. I could not imagine doing an embedding indexing project without them.

Additional Information

Software tools

emDEX: *www.emdex.ca/*

FrameMaker: *www.adobe.com/products/framemaker/main.html*

IXgen: *www.fsatools.com/*

Online post-it notes: *www.3m.com/market/office/postit/com_prod/psnotes/download_lite.html*

Resources

Barrett, Anne C., "IXgen: Tips, Tricks and Totally Cool Techniques," available at *www.stc.org/48thConf/postconf/anne_barrett.pdf*.

Haskins, Lucie, "IXgen Demonstration," ASI National Conference, Galveston, May 2002, available at *www.asicolorado.org/members/lhaskins/resources.htm*.

Mauer, Peg, "Embedded Indexing in FrameMaker," *KeyWords*, The Newsletter of the American Society of Indexers, September/October 1998: 1, 6-8. Also available at *www.stc.org/ConfProceed/1999/PDFs/STC-4.pdf*.

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