

Embedded Indexing in FrameMaker™

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Embedded indexing is the process of creating index entries electronically in a document's files. Although desktop publishing packages are not the best tools for indexing, they can be used to create effective embedded indexes. For technical documents that will be updated frequently or will go online, technical communicators can create embedded indexes that will help their audience find information quickly and efficiently.

In a previous article, I discussed some of the advantages and disadvantages of embedded indexes, using examples from Microsoft Word™(9). In this article, I'll discuss the specifics of writing embedded indexes in FrameMaker. For this discussion, I'll assume that you are familiar with using FrameMaker, its commands, and its Reference Pages.

There are products like IXgen™ that make it easier to create an index in FrameMaker, but for this discussion, we'll use only the indexing feature that comes with FrameMaker.

Every indexer has a different method and style of writing an index; indexing is an art. Because you cannot see the index develop in FrameMaker, some indexers use dedicated indexing software (like CINDEXTM or Macrex) to write the index and then re-type the entries into FrameMaker. This may save time because it's easier to edit the index in the dedicated indexing software than in FrameMaker. You may find a method that is easier or faster for you, but the following is the basic procedure that I use when creating an index in FrameMaker.

Creating Index Entries

1. Open the FrameMaker document that you need to index.
2. Place your cursor in the text where you want to create an index entry. I prefer to put index markers at the end of each paragraph to avoid cluttering up the text. You may, of course, put the index entries wherever you wish.
3. Pull down the **Special** menu and choose **Marker...** The Marker box appears, with the default marker type of Index.
4. Type the index entries for that paragraph in the Marker Text box, separating index entries with a semi-colon as shown in the illustration below. To create a subentry, separate the main entry and subentry with a colon, for example, "software:installing".

To enter an index entry that includes a page range, you must precede the index entry with the <\$startrange> tag. At the end of the discussion (in a different index Marker box), the page range must end with a matching <\$endrange> tag. For example, "<\$startrange>installing the software" and "<\$endrange>installing the software". Make sure that the text which follows the <\$startrange> and <\$endrange> tags is *identical*. If there is an extra space or any other difference, the page range will not be created correctly.

FrameMaker will assume that any text after the <\$startrange> tag is part of the page range, so I always put them at the end of the Marker Text. You may have up to 255 characters in an Index Marker.

5. Click on **New Marker**.

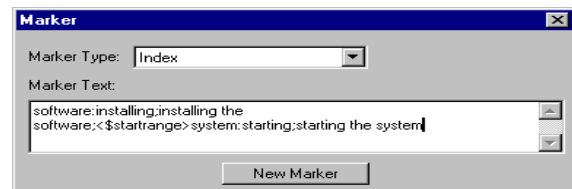


Figure 1. Creating several index entries in a Marker dialog box

Once you click on "New Marker" in the Marker box, FrameMaker creates an index marker in the text. If you choose to View → Text Symbols, the index marker will be visible; it looks like a bold capital **T**. Note that the Marker box remains on the screen, but the "New Marker" button changes to "Edit Marker." Since the index marker is still selected, you can make changes to the index entries that you just created and then click on "Edit Marker" for those changes to take effect.

Creating Cross-references

To create a cross-reference, precede the entry with the tag <\$nopage>. For example, "<\$nopage>finding. <Emphasis> See <Default Para Font>searching". Note the initial capital letters in "Emphasis" and "Default Para Font." These tags are case sensitive; if you type <emphasis> or <Default para font> the text will not format correctly. The <Emphasis> tag causes "See" to be in italics; the <Default Para Font> restores the font to what it was before you applied the italics.

The <\$nopage> tag will omit page references from any index entry that follows it in the Marker Text, so I always

put the <\$npage> tag at the end of the index entry, as shown in the following example:

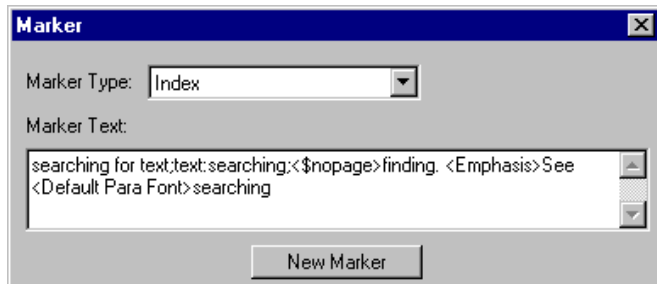


Figure 2. Creating a cross-reference in a Marker dialog box

If you're creating a cross-reference for an entry and you want the "See also" to follow the main entry like this:

problems. *See also* troubleshooting
correcting, 33
reporting, 34

instead of being a subentry like this:

problems
correcting, 33
reporting, 34
See also troubleshooting

then you must create the following index entries in FrameMaker(10):

problems. <Emphasis>See also <Default Para Font>troubleshooting:correcting

problems. <Emphasis>See also <Default Para Font>troubleshooting:reporting

Note that in this example, the <\$npage> tag is not required.

Generating the Index

Follow the previous steps to create index entries throughout the document. When you are ready to generate the index, do the following:

1. Pull down the **File** menu and select **Generate/Book...** FrameMaker displays the Generate/Book window.
2. Select the button for **Standard Index**, and click on **Generate**. FrameMaker will display the Set Up Standard Index box that is shown below.

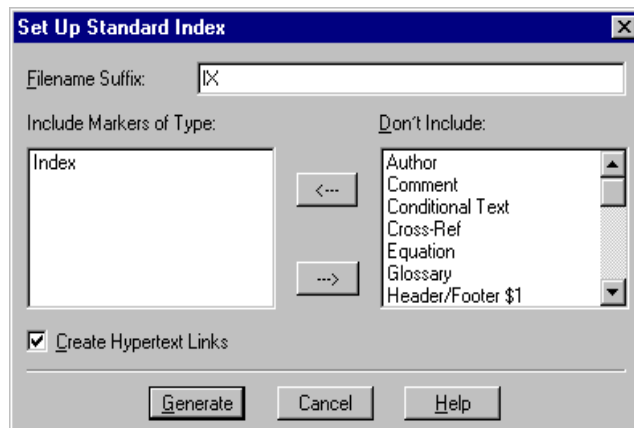


Figure 3. Generating the index

3. Check to make sure that the "Create Hypertext Links" box is checked, and click on **Generate**.

FrameMaker will create the index and put it in a separate file. Now that you can see what your index entries look like, you'll probably need to go back to edit some of them. Because you checked the box, "Create Hypertext Links," FrameMaker created a link between your index entries and their associated text.

Editing an Index Entry

1. In the index document that FrameMaker just created, put the mouse pointer over the page number for the index entry that you need to edit.
2. Hold down the Ctrl and Alt keys simultaneously, and click on the page number. FrameMaker will display the index marker for that index entry.
3. Edit the index entry in the Marker Text box, and click on **Edit Marker**. You will have to generate the index again for the changes to be visible in the index.

If you see index entries with page references of 2-?? or ??-7, it means that you didn't specify the <\$starange> or <\$endrange> tags correctly. In the index, you can return to the entry to correct this by holding down the Ctrl and Alt keys simultaneously, and clicking on the page number.

Finding Index Markers

While editing the index, you might want to search for index markers in the FrameMaker document. You can search for an index marker by using the Find/Change box.

1. Check that the Marker window is displayed so you can see the index entries as you find them (choose Marker from the Special menu).

2. Pull down the **Edit** menu and choose **Find/Change** (or press Ctrl F).
3. Click on the down arrow that is next to the “Find Text:” field, and choose **Marker of Type**.
4. Type **index** and press Enter. FrameMaker will find the next index marker and will display its contents in the Marker window.

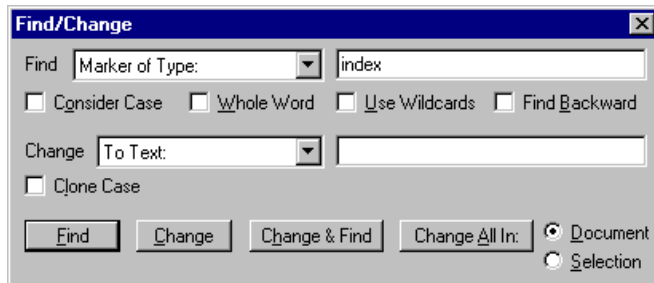


Figure 4. Finding index markers

Deleting Index Markers

You may occasionally choose to delete all of the index entries in a FrameMaker document.

1. Display the Find/Change box (choose Find/Change from the Edit menu).
2. Select **Marker of Type** and type **index** as the type of marker to find.
3. Leave the “Change” field blank.
4. Click **Change All In** to delete all index entries in the document(2).

Sorting Index Entries

By default, FrameMaker sorts index entries word by word. You can tell FrameMaker to sort letter by letter by changing the Reference Page for the index. The following steps explain how to change the Reference Pages.

1. Make sure that the window containing the index is the active window and pull down the **View** menu; select **Reference Pages**.
2. Find the Reference Page that ends in IX.
3. Add a space to the *beginning* of the IgnoreCharsIX paragraph.
4. Pull down the **View** menu and select **Body Pages**.
5. Save the index document and re-generate the index to sort the index letter by letter.

FrameMaker does not ignore prepositions, conjunctions and articles (and, in, with, for, a, an, the, etc.) in subentries. To ignore insignificant terms at the beginning of subentries, you must change the way FrameMaker sorts the subentries.

By default, FrameMaker will sort subentries in alphabetical order, as in the following example:

```
errors
  in software 3
  reporting to technical support 2
```

To force FrameMaker to ignore the word “in” in the first subentry, type the following entries in the index Marker box:

```
errors:reporting to technical support
errors:in software[errors:software]
```

The result will appear as follows:

```
errors
  reporting to technical support 2
  in software 3
```

Formatting the Index

FrameMaker does not put a comma between the index entry and the page reference unless you tell it to. If you want a comma to precede the page reference, you must edit the Reference Page.

1. When the index document is displayed in the active window, choose **Reference Pages** from the **View** menu.
2. In the paragraph called SeparatorsIX, change the em space at the beginning of the line to a comma and a space.
3. Pull down the **View** menu and select **Body Pages**.
4. Save the index document and re-generate the index to see commas after the page references.

FrameMaker will apply the same formats to the index that are applied to the source document. Here are some formatting tips for a typical index:

To make a two-column index, choose Format → Page Layout → Column Layout; change the number of columns to two.

Once you get an index formatted the way you want it, you can save that index and apply its format for future indexes (File → Import → Formats...).

Final Comments

One of the disadvantages of embedded indexing is that if changes are made to the document after it is indexed, it will significantly alter the index. If a paragraph is moved from one page to another, the <\$startrange> tag might

end up *after* the <\$endrange> tag. This would cause the “?? errors” that I mentioned earlier under Editing an Index Entry. This is another reason why indexers should insist that the text and page numbers be finalized before they start indexing.

Be sure to check each line of the index carefully before having it published!

This has been a very brief overview of creating embedded indexes in FrameMaker — a topic that covers 27 pages in the *Using FrameMaker* manual. My intent has not been to show you all there is to know about creating embedded indexes in FrameMaker, but to give you an overview of some of the advantages and disadvantages of creating embedded indexes, and to demonstrate how to create basic index entries with this tool.

REFERENCES

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