IXGen:

totally cool

Tips, Tricks, and Techniques

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Welcome

IXGen is an add-on utility to Adobe FrameMaker that enables you to build Frame indexes faster than you can in Frame alone. The core of IXGen's functionality is an editable list of markers. You can perform any Frame edit function on this list, then apply the edited list to your source documents.

Arguably, IXGen's widest use is in indexing. However, you can use IXGen to build lists of any defined marker, paragraph type, or character type. You also can build lists of instances of keywords.

What We'll Cover

- Background information: a little history, what platforms IXGen works on
- How to acquire IXGen, space requirements, price, support, warranty
- How to access IXGen once it's installed; how to access IXGen help
- The Basic Stuff: how to use IXGen to build an editable list of index markers; to create cross-indexed entries; to build lists of other types of markers
- Tips and tricks are scattered throughout
- Most of the techniques start on page 14

What We Won't Cover

Cost analysis. There is, however, an excellent cost analysis section in the whitepaper on IXGen at:

http://home.pacifier.com/~franks/ixmid.html

(Click the "cost analysis" link from this page.)

Background Info

History

IXGen was written and is currently marketed by FSA Tools (formerly Frank Stearns Associates, Inc.). It first appeared in its current form in 1994.

I first used it during that year, quickly becoming addicted. Since that time I wouldn't be without it. (I've even refused a contract to index Frame documents where IXGen wasn't going to be available.)

Platforms

IXGen works only with Adobe FrameMaker. Currently, IXGen is sold in these "flavors":

- FrameMaker 6.0 on Windows (95, 98 and NT)
- FrameMaker 5.0/5.1 on Windows (95 and NT)
- FrameMaker 5.5 or 5.0/5.1 for SunOS
- FrameMaker 5.5/6.0 or 5.0/5.1 on Solaris

Acquiring IXGen

You can access FSA on, and purchase IXGen through, their webpage:

http://home.pacifier.com/~franks/index.html

What you download from the page is an executable file. You'll need a one-time password to complete installation. FSA sends you this password when they receive either a credit-card payment or a corporate purchase order number.

Space Requirements

Total space required for IXGen works out to 1,238KB (1.2MB).

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COST

As of December 2000 IXGen was selling for:

Quantity	MS Windows (Win 95/98, NT)	UNIX (Solaris/SunOS)
1	$199.00 first copy	$299.00 first copy
2-4	$149.00 each additional	$179.00 each additional
5-9	$99.00 each additional	$119.00 each additional
10+	$69.00 each additional	$99.00 each additional

SUPPORT

Support is provided by the developer, Frank Sterns Associates, for one year from the date of purchase.

WARRANTY

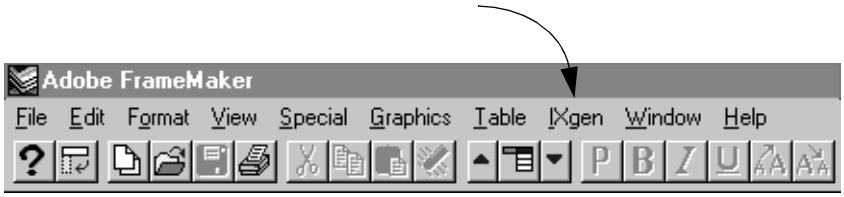
Here's a portion of the warranty statement found in the IXGen manual:

"This product has been thoroughly tested and will perform the functions described in this manual. However, should you have a demonstrable problem with the product we will ask for copies of the files that caused the problem, the return of your original distribution, along with a brief statement from you describing the problem.

Within 5 working days of receipt of your files we will verify the problem. We will then, at our discretion, do one of the following: (a) immediately issue you a new release of the product (no charge); (b) refund your purchase price (you must return the materials); (c) resolve the problem within 60 calendar days and issue you a revised version at NO CHARGE for either new materials or shipping."

ACCESSING IXGEN AFTER INSTALLATION

Once installed, IXGen becomes an option in the Frame menu bar:



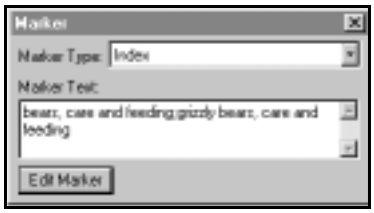
ACCESSING IXGEN HELP

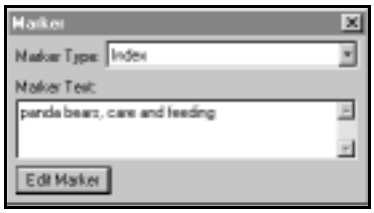
IXGen documentation for all versions is available as a 749Kb PDF file from the FSA webpage. There is no linked help from inside Frame.

Basic Usage

BUILDING A LIST OF EXISTING INDEX ENTRIES IN ONE FILE

As an indexer you'll run across documents that have no indexes and documents that have partial to full existing indexes. For starters, let's work with a 200-page zoo keepers' manual that already has an index. Two of the index entries are:





To save you squinting, these entries are:

- bears, care and feeding;grizzly bears, care and feeding
- panda bears, care and feeding

> **For Beginners:** The semicolon between "feeding" and "grizzly" breaks the contents of this index marker into two index entries.

The resulting index (containing just these entries) looks like this:

```
bears, care and feeding
grizzly bears, care and feeding
panda bears, care and feeding
```

We want it to look like this:

```
bears, care and feeding
   grizzly bears
```

```
panda bears
```

Exercise 1: Building and Using an IXGen List for One Frame File

Objective

Build a list of existing markers, edit it, and reapply it to the file.

Tip! Sometimes you'll want to work with only a few index markers at a time, such as those for a particularly difficult section. You can limit the markers IXGen examines by highlighting a specific line, paragraph, or section before generating the IXGen list.

Procedure

1 Select IXGen > Gen[erate] Editable Marker List.

The basic IXGen dialog appears:

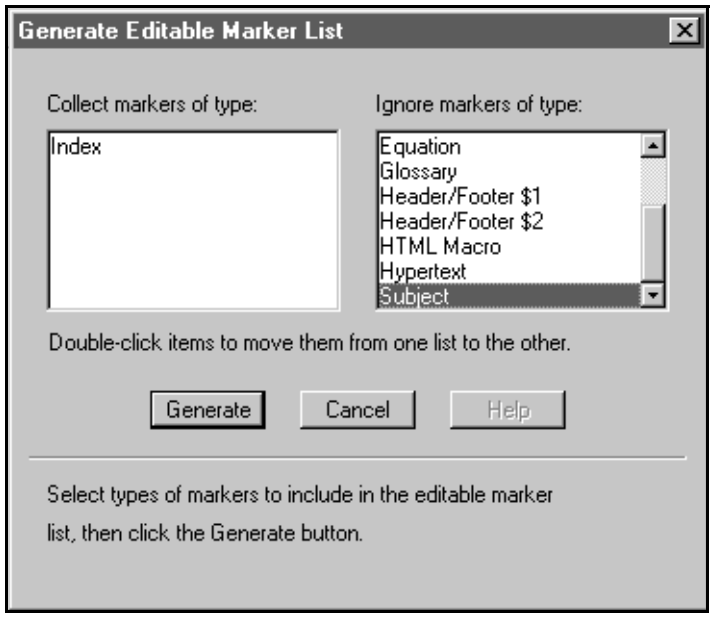
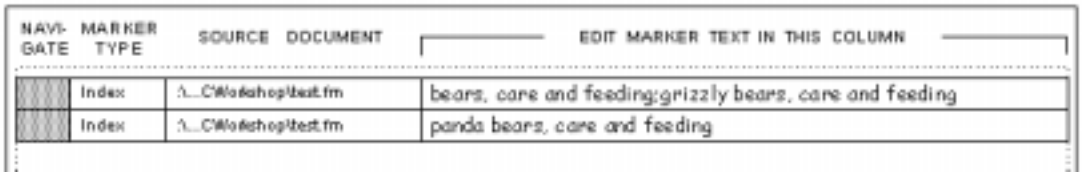


Figure 1. Generate Editable Marker List dialog

The default marker in the *Collect markers of type* field is Index.

2 Click *Generate*.

IXGen generates an IXGen list, which is in most functional respects the same as a Frame table. For these index markers, the IXGen list looks like this:



NAVI-GATE	MARKER TYPE	SOURCE DOCUMENT	EDIT MARKER TEXT IN THIS COLUMN
	Index	^...C\Workshop\test.fm	bears, care and feeding;grizzly bears, care and feeding
	Index	^...C\Workshop\test.fm	panda bears, care and feeding

Figure 2. Portion of an IXGen list

3 Change this:

```
bears, care and feeding;grizzly bears, care and
   feeding
```

to this (new text in bold):

bears, care and feeding;**bears, care and feeding:**grizzly bears

4 Change this:

```
panda bears, care and feeding
```

to this:

bears, care and feeding:panda bears

5 In the IXGen list, select IXGen > Apply Edited Marker List...

The Apply Edited Marker List dialog appears:

Figure 3. Apply Edited Marker List dialog

6 Click *Apply*. IXGen applies your changes.

7 Your file has been altered with the refreshed index marker text. Save the file.

8 Discard the IXGen file.

9 Regenerate your index.

Tip! If you work with IXGen a lot you'll find it's useful to keep one index entry in each marker.This is because the IXGen list is alphabetical, and it's easier to scan a list that contains a single entry per table cell. If you habitually build index markers with multiple entries, don't worry: you can check the *Split multiple index entries into separate markers* checkbox before you apply the list. (Remember that you can always pinpoint a marker in your Frame file by using the Find function.)

However, if you intend to build page ranges in your index, leaving multiple index entries in your markers until the last moment can give you an advantage. See "Creating Page Ranges" on page 23 for why.

Outcome

The index now looks like this:

```
bears, care and feeding
   grizzly bears
   panda bears
```

ANATOMY OF AN IXGEN LIST

You may want to take a moment at this point and identify the parts of an IXGen list.

The Usage Summary

The IXGen list comes with a usage summary or “quick start” at the top. This section is a graphic in the template.

The Columns

The IXGen list has four columns. The “payload” area is the right column, containing marker content that you can search, edit, and otherwise treat as text. IXGen instructions and help refer to the cells in this column as “marker text cells.”

All other columns contain the navigation information that tells IXGen where to apply each marker.

Caution: Do not alter the text in any but the right-most column. If you change text in any of the navigation columns, IXGen will be unable to apply that list. You’ll have to regenerate the list and redo your work.

Saving the List

You can discard an IXgen list as soon as you have successfully applied the markers in it. However, it’s sometimes useful to save the list, particularly when you’re doing a lot of changes (see the preceding caution) or must leave your work for awhile. The saved IXGen file has an .fm extension. (I generally name this file “ixxie” and overwrite it several times during a project.)

Deleting the List

IXGen generates a new list every time. If you do not discard your old lists, you may eventually find yourself with a dozen or more open IXGen lists without a clue as to which is the current one.

You can discard an unsaved IXGen list by doing either of the following:

- Exit without saving
- Press Ctrl-Alt while clicking the *Discard List* button at the top of the list.

Changing Fonts in the List

The default font for an IXGen list is Urbana. However, you can change the font in the template. Changing the font in the template has zero effect on the font used in your Frame file.

Tip! If your system does not have Urbana installed, you may find that IXGen appears not to work. Use this procedure to change fonts to something that's available on your system, such as Arial. (Thanks, Jan!)

To change the fonts

1. Open the file named edtblst.fm. The default install process placed it in your Program\FrameMaker*xx*\Templates\Special directory.
2. Highlight the column(s) for which you want a different font. (Keep in mind that you will be working only with the text in the far right column, so that's really the only one you must be able to read.)
3. Select Format > Paragraph.
4. Change the paragraph setup in that column to your preferred font.
5. Save and close the file.

Adding Markers in IXGen

The index from Exercise 1 now looks like this:

```
bears, care and feeding
   grizzly bears
   panda bears
```

It would be good to have some cross-indexed entries in there. As luck would have it, you can add these in IXGen.

Note: You cannot add markers by adding rows to the table. IXGen would not have the necessary navigational information—that's the info in the three left-most columns—attached to your new text. However, you can use the following procedure to introduce entries where entries already exist.

Exercise 2: Adding New Markers To Old With IXGen

Objective

Create new markers in the file by adding text to existing markers, using IXGen.

Procedure

1 Select IXGen > Gen[erate] Editable Marker List.

2 In the marker text cells, change the text as shown (new text is in bold):

```
bears, care and feeding;feeding and caring for bears

bears, care and feeding:grizzly bears;grizzly bears,
   care and feeding;feeding and caring for
   bears:grizzly

bears, care and feeding:panda bears;panda bears, care
   and feeding;feeding and caring for bears:panda
```

3 In the IXGen list, select IXGen > Apply Edited Marker Text.

4 Make sure the *Split multiple index entries into separate markers* checkbox is checked.

5 Click *Apply*.

6 Save your file.

7 Regenerate the index.

Outcome

The index now looks like this:

```
bears, care and feeding
   grizzly bears
   panda bears
feeding and caring for bears
   grizzly
   panda
grizzly bears, care and feeding
panda bears, care and feeding
```

Deleting Markers in IXGen

There are two ways to do this. What you do depends on your needs.

Manually Deleting Markers

To delete a marker, delete the marker text cell for that marker. DO NOT delete the navigational information for that marker from the columns to the left.

Use this method to delete multiple markers simultaneously.

Tip! Particularly with some of IXGen's advanced features (starting on page 14 of this handout), when you're re-indexing an entire document it's often faster to start by stripping out all existing markers and then building the index again from scratch. To delete all the markers from a file or book, delete the text from the right column of the entire table. Leave the column itself empty but present.

Again, deleting any navigational information for those markers from the columns to the left would amount to major bad news.

Automatically Deleting Duplicate Markers

Why You Would Want To Do This: Frame merges duplicate markers on the same page, so having duplicates in the same area creates no problem for the readers of hardcopy documents. In online documents, however, duplicate entries create functional problems because a link can go to only one location.

In addition, every extra character creates overhead in your document.

Why You Would <u>Not</u> Want To Do This: Occasionally you'll find that you've created index entries with the same wording in different parts of the document. While this often indicates poor document construction, in many cases further differentiation may be possible (and would be useful to the reader). Before you delete multiple markers, therefore, go through your index and see that there are no unintended multiple page references.

How you do it:

1 Make your file or book file the active file.

2 Select IXGen > Delete Redundant Markers.

A simple Delete Redundant Markers dialog appears, giving you the choice to "Go" or "Cancel."

3 Click *Go*.

IXGen will delete markers that are the same, leaving only one instance of each.

BUILDING A LIST OF EXISTING INDEX ENTRIES IN A BOOK FILE

You can build an IXGen file for a book as easily as for a solitary file. However, before you build an IXGen list for a book file you must alert IXGen to the files it must examine.

Exercise 3: Creating an IXGen List for a Book

Objective

Create an editable list of all marker entries in a book.

First-Time Setup for Multiple Files

1. In the book file, select *IXGen* > *Select Files*.

   Make sure the Process Files window shows all text files in the document. You can leave generated files like the Table of Contents and Index in the Ignore window.

2. Click the *Select Files* button.

   IXGen creates the .ixc file in the current directory.

Procedure

1. In the book file, select IXGen > Gen[erate] Editable Marker List.

   The basic IXGen dialog appears (illustration on page 5).

2. Make your changes.

3. In the IXGen list, select IXGen > Apply Edited Marker List...

   The Apply Edited Marker List dialog appears (illustration on page 7)

4. Click *Apply*.

5. Discard the IXGen file.

6. Regenerate your index.

Outcome

Your files have been altered with the refreshed index marker text. Save the files before proceeding.

> **For Beginners:** You can reduce your keystrokes here by pressing Shift as you select File. This action displays a slightly different menu than you would see if you simply selected File. In this case, press Shift, then select File > Save All Open Files.

Advanced Usage

CREATING MARKERS FROM KEYWORDS

Quite often a writer will give an indexer a list of terms that should be included in a document. You can make quick work of this by using IXGen's keyword function.

1 Open <*YourFrameMakerDirectory*>\Templates\Special\keyctrl.fm.

1 Make a working copy of this file, or use it as a template for a new document.

2 List your keywords, *one per cell*, in the left-hand column of the table. Build a new row for each keyword.

3 In the right-hand cell, list alternate phrases to use as the marker text. Put each alternate in its own paragraph, but keep them in one cell. When IXGen matches a keyword, it presents the list of choices for that keyword. You can select one of those alternates or enter a new one.

Alternatively, leave the right-most cell blank. When this cell is blank, IXgen uses the keyword itself for the marker text.

Tip! To increase the number of possible alternates, change the value of "MFKMaxHistory" in the fminit\ixgen.ini file (Windows only).

4 Save the file.

5 In your source file or book, select IXGen > Markers From Keywords.

Use the file browser that appears to select the keyword file. IXgen searches through the source text for occurrences of the keywords. When IXGen finds a keyword, select which alternate phrase to use for the marker, or enter new

text using the dialog box. Changes that you make to the Marker Text Choices are automatically saved in the keyword document.

Caution: A given keyword control file can be in use by only one user at a time. If multiple users need simultaneous access to the same set of keywords, make as many copies of the keyword control file as there are simultaneous users. If each user independently changes the marker text entries, each file will differ.

6 Save your text files.

If you did not supply alternate text in the right-hand cell, there's still this fix:

1 Generate your index.

2 Lock your index (by pressing Esc-F l k).

3 Using live links, find each example and differentiate them for the index.

A REALLY FAST INDEXING TECHNIQUE

One of the fastest ways to build a new index for a technical document is to start by building markers from defined paragraph tags, then add cross-indexing and detail. Here's one technique, start to finish.

Process overview:

1 At the book level, build markers for all warnings, cautions, figure captions, and table captions (Exercise 4: "Building New Index Entries for Warnings and Cautions," starting on page 16, and Exercise 5: "Building New Index Entries from Figure and Table Captions," starting on page 19).

2 At the book level, build markers for all chapter and appendix titles (Exercise 5, starting on Exercise 6: "Building New Index Entries from Chapter Titles," starting on page 20).

3 At the file level, build markers for all Level 1, 2, 3, and 4 headers (Exercise 6, starting on Exercise 7: "Building New Index Entries from Headers," starting on page 20).

4 At the file level, go through and index other appropriate terms or concepts that do not appear in the headers (Exercise 8: "Adding Detail To Your Index," starting on page 20).

5 At the file level, go through each index marker and create appropriate groupings (Exercise 10: "Organizing Your Index Entries Into Hierarchies," starting on page 22).

6 At the book level, proof, edit, and clean up your index for publication (Exercise 7, starting on Exercise 12: “Proofing, Editing, and Cleaning Up the Index,” starting on page 24).

For a 100-page document, the first three steps can take up to 30 minutes, usually less. By far the most time-consuming activities are the last three.

Tip! Before any index markers exist, the Create Markers from Paragraph Tags is an excellent mechanism for checking and editing for parallel construction among headings, figure captions, and so on.

Exercise 4: Building New Index Entries for Warnings and Cautions

Objective

Build index markers from Warning and Caution paragraph tags and prepare them for use in an index. This exercise is complex and so is presented in four stages (A through D).

Assumptions: that your organization has defined paragraph tags that approximate the ones used here as examples, and that you can make the logical leap from example to reality.

Procedure A: Creating New Markers

Start with warnings and cautions.

1 In the book file, select IXGen > Markers From Para[graph] Tags.

The Create Markers from Paragraph Tags dialog appears:

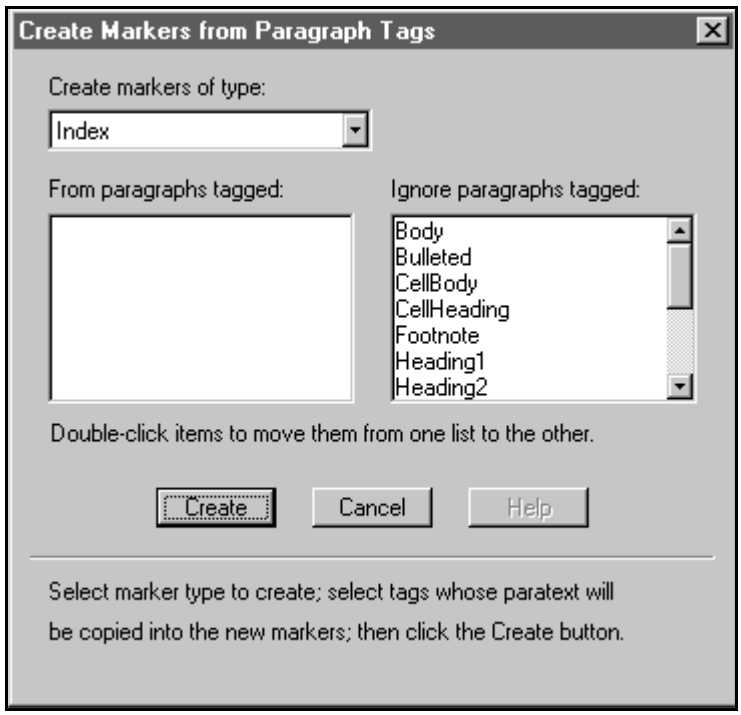


Figure 4. Create Markers from Paragraph Tags dialog

Note: By default, you will create index markers. However, IXGen can create markers from any defined marker type.

2 To keep things as visually clean as possible while you work, always handle the item with fewer instances first. Technical documents seem to have more cautions than warnings, so do the warnings first. In the Ignore Paragraphs Tagged list, double-click your own paragraph tag for Warnings to place it in the From Paragraphs Tagged list.

3 Click *Create*.

IXGen places a new marker at the beginning of every Warning paragraph. For purposes of this discussion, let's agree that your document has two Warning paragraphs:

- "Warning: Do not attempt to pet the polar bear."
- "Warning: Failure to follow proper feeding procedures may result injury to both you and the bear."

Procedure B: Editing the New Markers

Each of the new markers contains all the text in its Warning paragraph. You must edit these to fit your index style.

1. Save your files.
2. Create an IXGen list of all editable markers.
3. Change this type of thing:

   ```
   Warning: Never attempt to pet the polar bear.
   ```

   to something like this:

   ```
   polar bear, warning regarding contact
   ```

4. Change this type of thing:

   ```
   Warning: Failure to follow proper feeding procedures
      may result injury to both you and the bear.
   ```

   to something like this:

   ```
   feeding procedures, warning regarding
   ```

   Note: The colons in the original text would, in fact, create a second level in each of these index markers if left unedited.

5. In the IXGen list, select IXGen > Apply Edited Marker List...

   The Apply Edited Marker List dialog appears (illustration on page 7)

6. Click *Apply*.
7. Discard the IXGen file.

Procedure C: Building the Next Set of Markers

1. Perform Procedure 4A with these changes:
   - Return the Warning paragraph tag to the Ignore Paragraphs Tagged list.
   - Move the Caution paragraph tag into the From Paragraphs Tagged list.
2. Perform Procedure 4B, using edits consistent with the “caution” wording.

Tip! The generated IXGen list will contain both the edited Warning markers you created in Procedures 4A and 4B, plus the new Caution tags you just created. You’ll know which is which because the Warning tags include the string “warning.”

Outcome

Your draft index now has markers for all warnings and cautions. You might want to save your files before proceeding.

Changing Capping in Created Marker Text

Your organization's style may call for init-capping in captions. Many corporate styleguides call for lowercasing all but proper nouns and acronyms. To quickly adapt your draft index to that style, take advantage of IXGen's Capitalization facility:

1 In the IXGen list, select IXGen > Capitalization.

The Marker Text Capitalization dialog appears.

2 Of the choices provided, select *all word in lowercase* for Level 1 markers. (All your markers at this point are Level 1 markers.)

3 Use Edit > Find/Change to recapitalize proper nouns and acronyms.

Tip! You'll be lowercasing things again in the next step, when you build your markers for all the headings. If you wish, you could perform this "decapitalization" step only once, later in the process. On the other hand, I find the draft index more readable if I drop the capping at both stages, and I do my recapitalizing only when the index is fairly well along. Your call.

Exercise 5: Building New Index Entries from Figure and Table Captions

Objective

Build index markers for the figures and tables in your document.

Procedure

Proceed as through Exercise 4, using your paragraph tags for figure and table captions.

Outcome

Tip! Isolate your figure and table index entries in this early stage of index development by preceding each one with the string "FIGURE" or "TABLE," as appropriate. This keeps them "out of the way" alphabetically while you're creating the rest of your initial markers.

Your draft index now has markers for all warnings, cautions, tables, figures, and chapter/appendix headings.

You might want to save your files before proceeding.

Exercise 6: Building New Index Entries from Chapter Titles

Objective Build one basic index entry from each chapter or appendix title.

Procedure Proceed as through Exercise 4, using your paragraph tags for chapter and appendix headings.

Outcome Your draft index now has markers for all warnings, cautions, tables, figures, and chapter/appendix headings.

You might want to save your files before proceeding.

Exercise 7: Building New Index Entries from Headers

Objective Build one basic index entry for each section header.

Procedure Build index markers from your headings, using the same process as in Exercise 4, Procedure A (page 16). Use your own paragraph tags for heading levels 1, 2, 3, and 4.

Note: Now is a good time to drop the capping, as described on page 19. Go back and use Frame's global Find > Replace options to capitalize all proper nouns and acronyms.

Outcome Your draft index now has markers for all warnings, cautions, tables, figures, chapter/appendix headings, and headers.

Again, you might want to save your files before proceeding.

Exercise 8: Adding Detail To Your Index

Objective You have now completed a fairly good draft index using IXGen, but the level of detail is still quite coarse. Now is the time to go back through your text with an imaginary magnifying glass, and examine it for other possible index entries in the text.

Note: I often collaborate with the writer at this point to make sure I catch all terms of importance. If you do this, you may wish to use the technique described in "Creating Markers from Keywords" on page 14 to find key terms.

Procedure At this stage build your index markers as you normally would in Frame.

Outcome You now should have a pretty good draft index!

Exercise 9: Adding Cross-Indexed Entries

Objective Now is a good time to cross-index. Enter your new index entries in the same IXGen table cell as the old ones, with semicolons between each entry.

> **For Beginners:** Cross-indexed entries (sometimes called double-postings) are logical reversals of terms in order to give the reader multiple access points. This section contains one example.

Procedure Start with a freshly generated IXGen list.

Because your material will differ, this section offers more in the way of example than procedure. Suppose you have an entry that looks like this:

```
printing photographs in color
```

Change it to something like this (new text in bold):

```
printing photographs in color;photographs, printing
   in color;color photographs, printing
```

This text will produce three index entries in a generated index:

```
color photographs, printing
.
.
.
printing photographs, printing
.
.
.
printing photographs
```

Continue this way through the IXGen list.

Outcome Your draft index now has entries for all warnings, cautions, tables, figures, and headings for chapters, appendices, and sections, with cross-indexed entries.

You might want to save your files before proceeding.

Exercise 10: Organizing Your Index Entries Into Hierarchies

Objective

Now it's time to organize all these first-level index entries into logical groupings and hierarchies. This is a necessary but time-consuming step.

Procedure

Here's the way I do this:

1 Go to the top of the first text file.

2 Search for Markers of type Index.

3 Edit the text to match your index style. For example, change something like:

```
Making Courier Your Default Font
```

to something like:

```
courier, making the default font
```

Note: Be at peace: you clean up hierarchies (such as what you would have with more than one reference to courier) a bit later.

4 Save the edited marker.

5 Highlight and copy the marker text.

6 Search for the next index marker.

7 If this index marker is at the same level as the last, repeat from Step 3.

If this index marker is for a document element that is subsidiary to the last one your worked on, paste in your copied text. Add a colon to separate the levels.

8 Continue this way through the document.

Note: This technique is fairly easy to follow down to your 3rd-level header. You may, however, have to exercise some creativity to accommodate levels below that. One way to do this is to delete the top-level header in the marker, placing the greater amount of detail at the more-precise lower levels.

Outcome

Your draft document now has a fully formed index, although there are as yet no page ranges or cross-indexed entries.

Exercise 11: Creating Page Ranges

At last, we come to the section where you separate the entries within index markers. This involves a little manual labor, but is worth it.

Objective

Set up page ranges in your index.Procedure

> **For Beginners:** In Frame you establish a page range by using two markers: one at the start of the range, one at the end of the range. The starting marker must start with the string **<$startrange>**. The ending marker must start with the string **<$endrange>**.

Procedure

1 Generate a fresh IXGen list.

2 Add the string "<$startrange>" to the beginning of each marker that should begin a page range.

Tip! Add this only once to each text cell in the IXGen list. When you split the entries into separate markers, IXGen will copy the <$startrange> tag to the front of each new marker entry.

3 Apply the IXGen list to the file(s) *without splitting multiple index entries into separate markers*.

> **Note:** If you split them now, you'll end up expending several times as much effort as necessary.

4 Save your files.

This is where it things slow down again: in each file you must start at the top and do repeated Find operations for Markers of Type > Index. For every marker that starts with a <$startrange> tag:

1 Copy the tag and all the text.

2 At the end of the section, build a new marker by pasting the marker text into the Marker dialog. Save the new marker.

This technique inserts a new marker in the same font as the current paragraph.

3 In this new marker, change "<$startrange>" to "<$endrange>."

4 When you are finished, generate a new IXGen list.

5 Apply the list and this time check the box to split multiple index entries into separate markers.

Outcome IXGen splits the entries in your markers into individual markers, copying the <$startrange> and <$endrange> tags into each new marker.

Exercise 12: Proofing, Editing, and Cleaning Up the Index

Objective Proof, edit, and clean up your index for publication.

Procedure At the book level:

1 Generate an index.

2 Generate an IXGen file for the whole book.

Tip! Put these files side by side on your screen. You can shrink the IXGen file to show just the right-most column.

3 Working from your Frame index, go from front to back examining what needs to change: misspellings, level errors, terminology, missing cross-indexed entries... Make appropriate changes in your IXGen file.

4 Apply the IXGen file.

5 For every few changes in the IXGen file, regenerate the index to check the effect of your changes.

Tip! There will come a time quite early in this process when the IXGen file will be very out of order in relationship to your index; for example, if terminology changes or cross-indexing have added listings that are now in order in the index but not in the IXGen file. When that happens, stop where you are. Discard the IXGen file. Save your Frame files and regenerate the IXGen file. Start again.

Outcome Your draft index should now be in pretty good shape. Discard the IXGen file.

One More Thing

IXGen is a good tool for speeding the process in creating and editing an index. Another thing I've used it for, however, is to dabble with a new kind of list for use in technical documents, which I've called a procedures list. The purpose of the list is to give an extremely condensed set of directions on all the procedures in a document, which should be adequate for advanced users. At the same time, the list provides access to further information through the referenced pages, which accommodates less-experienced users. Here's a section of one:

```
adding and removing monitored devices
   (Step 1) open the Device List window 4-1
   (Step 2) add and remove devices 4-1
Administration folder, opening and navigating
   (Step 1) open the Monitor folder 1-5
   (Step 2) open the Dashboard folder 1-5
   (Step 3) display Administration folder files 1-5
   purpose of this action 1-5
alerts, configuring
   global settings for
   (Step 1) open the Global Threshold Settings window 4-2
   (Step 2) select the time interval between polls 4-2
   (Step 3) enter maximum number of warnings or alerts 4-2
   (Step 4) set logging of threshold violations 4-2
   (Step 5) save the new settings 4-2
individual device settings, changing
   (Step 1) open the Device Settings window 4-3
   (Step 2) select the device to modify 4-3
   (Step 3) select a time interval between polls 4-3
   (Step 4) choose all or individual devices 4-3
   (Step 5) save the new settings 4-3
```

In the procedures list the steps are listed in chronological, not alphabetical, order. The procedure names are cross-indexed. The links are live when the document is delivered in electronic form. It is in most respects simply another index.

Here are the steps for creating such a list:

1. In your file(s), create a new marker with a unique name. (“Procedure” seems appropriate, so I’ll use it as an example.)

2. As you build your index, add Procedure markers at the location of procedures and steps.

3. Make your “first-level header” here the name of the procedure.

4. Make each of the steps a second-level header. For example, the entry for a step in adding and removing monitored devices might be:

   ```
   adding and removing monitored devices:open the Device
      List window
   ```

5. For each step, add the string “(Step #),” where # indicates the number of the step.

   ```
   adding and removing monitored devices:(Step 1) open
      the Device List window
   ```

   This will cause the list to sort in chronological, not alphabetical, order.

6. Build a new generated list of the type Index of Markers, using your Procedure marker only.

7. Format the list as desired.

And that about wraps it up.

The Speaker

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