CHAPTER **9**   # INDEXING

INFOCUS

An *index* is an alphabetical listing of the topics or subjects in a document, and is typically located at the end of a document. An index is used primarily as a navigational tool, with the corresponding page number(s) for each topic listed alongside.

In this session you will:

- ✓ gain an understanding of indexing
- ✓ learn how to mark index entries
- ✓ learn how to create an *AutoMark* file
- ✓ learn how to use an *AutoMark* file
- ✓ learn how to delete unwanted index entries
- ✓ learn how to generate an index
- ✓ learn how to modify the index format
- ✓ learn how to update an index.

UNDERSTANDING INDEXING

As well as including a table of contents in long documents, consider also including an *index* at the end of the document. While a table of contents enables the reader to navigate to certain sections, for example, a well-constructed index will help the reader to locate all information about a specific topic within that document, by providing a detailed listing of the topics within the document.

What Is An Index?

An *index* is an alphabetical and detailed listing of topics in a document, with a corresponding page number displayed alongside (see picture below). An index is typically located at the end of a long document. An index helps readers to navigate long documents and locate specific information they may need. For example, you might refer to an index to locate all references to *solar panels* in a document about being environmentally-friendly at home. Unlike a table of contents, which lists headings and sections, for example, an index is based on specific terms and topics, making it a more detailed reference to the information in the document.

Another advantage of including an index is being able to create several index entries for a single topic. This can be useful, as people may use different terms to describe the same thing, for example *sun* and *solar energy*. By including both of these entries in the index, there is a much greater chance that readers will find the information they're looking for, despite not knowing the specific term used throughout the document.

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Generating An Index

You build an index by marking text to include with a special field, called an *index field {XE}*. This field tells Word to include the marked text as an *index entry*. You can create an index manually by marking all relevant text throughout the document, or you can create an *AutoMark file*, which Word will use to mark the entries throughout the document automatically on your behalf.

The obvious advantage of creating an index manually is that you have total control over the process, and can ensure accuracy of index entries. You also determine what text is marked to include in the index.

To help Word generate an index automatically, you need to create an *AutoMark file*, which is a two-column table. The first column lists the text to be marked, and the second column contains the corresponding index entry. The document is then cross-referenced with the AutoMark file, and *all* text that matches the data in the first column will be marked. This method, although a quick way to index a long document, does not offer a large degree of control; you might find yourself spending time deleting and adding field codes.

An advantage of using an AutoMark file is that you can mark any number of documents using the same table of data. If many of your documents are quite similar in topic matter, this could prove quite useful. Following this, you can then insert any additional field codes as required. By listing all of the common terms in the AutoMark file, you are able to save time with each new document.

MARKING INDEX ENTRIES

An *index* lists the topics (such as relevant key words and phrases) in a document, and is designed to make long documents easy to navigate. The first step in creating an index is to *mark* the words and phrases that you want to include in the index. This is done selecting a word and using the *Mark Index Entry* dialog box to add an *index field* to the text.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W853 Indexing_1.docx...

1. Navigate to page *3* and select *environment* in the first paragraph

2. Click on the *References* tab, then click on *Mark Entry* 🔲 in the *Index* group to open the *Mark Index Entry* dialog box

3. Click on **[Mark All]** to mark all occurrences of the word *environment*

4. Click on **[Close]**

   When marking index entries, Word will show all formatting codes – notice the index field next to the text…

5. Select the word *Arachnids* on the same page, then press [Shift] + [Alt] + [X] to open the *Mark Index Entry* dialog box

6. Type **Arachnidae** in *Main entry*

   An index entry need not be identical to the text...

7. Click on **[Mark All]** then click on **[Close]**

8. Click on the *Home* tab, then click on *Show/Hide* ¶ to hide the codes

9. Save and close the document

① AGE – Commitment to the Environment

At Alpheius Global Enterprises we are committed to minimising the impact that our methods have on the environment. Research into the practices currently in place have shown that there are a number of vulnerable species existing within these environments, and it is the intention of AGE to ensure that the effects of operating businesses in these areas are not detrimental to the welfare of this local fauna.

②

Mark Index Entry

Index
Main entry: environment
Subentry:

Options
○ Cross-reference: See
● Current page
○ Page range
Bookmark:

Page number format
☐ Bold
☐ Italic

This dialog box stays open so that you can mark multiple index entries.

[Mark] [Mark All] [Cancel]

AGE — Commitment·to·the·Environment¶

At·Alpheius·Global·Enterprises·we·are·committed·to·minimising·the·impact·that· our·methods·have·on·the·environment{·XE·"environment"·}.·Research·into·the· practices·currently·in·place·have·shown·that·there·are·a·number·of·vulnerable· species·existing·within·these·environments,·and·it·is·the·intention·of·AGE·to·ensure· that·the·effects·of·operating·businesses·in·these·areas·are·not·detrimental·to·the· welfare·of·this·local·fauna.¶

④

In·particular,·there·are·three·Classes·of·animal·that·require·further·and·close· evaluation:·Arachnids{·XE·"Arachnidae"·},·Amphibians·and·Reptiles.·As·these· animals·are·readily·susceptible·to·the·smallest·changes·in·the·quality·of·air·and· water,·AGE·have·recognised·the·importance·of·the·animals·within·these·classes,· as·a·potential·early·warning·mechanism·of·detrimental·effects·of·business.¶

⑦

For Your Reference…

To *mark an index entry*:

1. Select the text
2. Press [Shift] + [Alt] + [X]
3. Type the index entry in *Main entry*
4. Click on **[Mark]** or **[Mark All]**
5. Click on **[Close]**

Handy to Know…

- If you are marking index entries for the whole document, you can leave the *Mark Index Entry* dialog box open while you mark each entry, that is, you can still select text while the dialog box is open. When you click in the dialog box, the *Main entry* field is updated.

CREATING AN AUTOMARK FILE

To mark text for inclusion in an index, you can either mark it manually using the *Mark Index Entry* dialog box (as in the previous exercise), or you can mark text automatically by creating an *AutoMark file*. This file must be a two-column table, with the list of text to mark in the first column and the *index entries* in the second column. An *AutoMark file* enables you to mark text quickly.

Try This Yourself:

Open File

Before starting this exercise you MUST open a new, blank document...

1. Click on the *Insert* tab, then click on *Table* in the *Tables* group to display the menu

    You will create a 2-column table…

2. Hover the mouse pointer over the grid to highlight a table with *2* columns and *4* rows, then click to insert the table

3. Ensure the cursor is positioned in the first cell, type **environmental** and press Tab

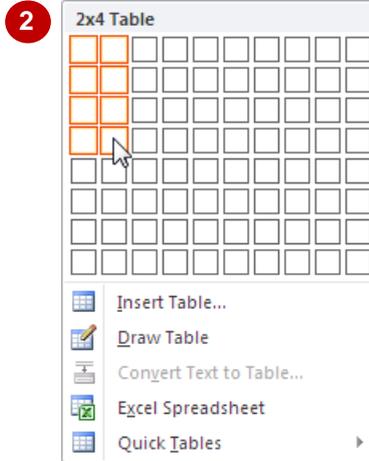   *Word has automatically capitalised the word, but marked text is case-sensitive, so it needs to be lowercase…*

4. Hover over the *E*, then hover over the blue square that appears below it to display *AutoCorrect Options*

5. Click to display the menu and select **Stop Auto-capitalising First Letter of Table Cells**

    This will stop automatic capitalisation…

6. Enter the remaining entries as shown

7. Save the document as *MyAutoMarkFile.docx* in the course files folder, then close the document

environmental	environment
Environmental	environment
habitat	habitat
waterways	water

For Your Reference…

To *create* an *AutoMark file*:

1. Create a new, blank document
2. Insert a table with two columns
3. Type **text to mark** in the left column and *index entries* in the right column of the table
4. Save and close the document

Handy to Know…

- In previous versions of Word, an *AutoMark* file was called a *concordance* file.

- For an AutoMark file to work properly when cross-referenced with another document, the text in the first column must exactly match the document text. For instance *computer* is not the same as *Computer* (case-sensitive).

MARKING INDEX ENTRIES WITH AN AUTOMARK FILE

One distinct advantage of using an *AutoMark file* to build your index is that once it is created and saved, you can apply it to any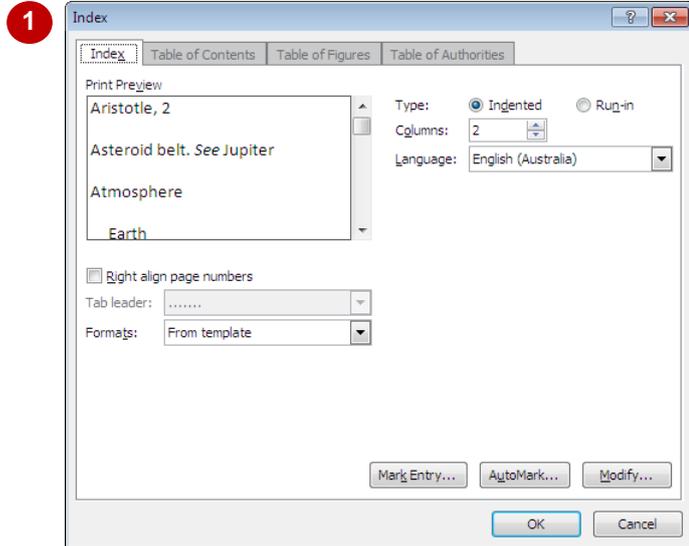 document that you want indexed. This is useful if documents you create contain similar topic matter. Word uses the text in the left column of the *AutoMark file* to locate text to be marked in the document, then lists it in the index using the entry in the second column.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W853 Indexing_2.docx...

1 Click on the *References* tab, then click on *Insert Index* in the *Index* group to display the *Index* dialog box

2 Click on **[AutoMark]** to display the *Open Index AutoMark File* dialog box

This dialog box enables you to locate and open the AutoMark file that you want to use...

3 Navigate to the course files folder and click on *MyAutoMarkFile.docx*

4 Click on **[Open]**

Word now scans through the document, marking all the text that matches the entries in the AutoMark file table...

5 Scroll through the document to view the new entries

Running the AutoMark file displays the index fields in the document...

6 Click on the *Home* tab, then click on *Show/Hide* ¶ in the *Paragraph* group to hide the codes

1

5

For Your Reference…

To *mark entries* using an *AutoMark file*:

1. Click on the *References* tab, then click on *Insert Index* in the *Index* group
2. Click on **[AutoMark]**
3. Locate and click on the AutoMark file
4. Click on **[Open]**

Handy to Know…

- Remain mindful of the multitude of different ways that people classify information. Two people, for example, may classify the same thing in different ways, such as *dirt* and *soil*. Try to account for and include these differences where possible.

REMOVING MARKED ENTRIES

Where you have used an **AutoMark file** to mark entries for indexing, you may find that you will need to remove marked entries from a document. As an AutoMark file will mark **all** matching instances of an entry, you may end up with marked entries that are not relevant or that you don't want to include. You can remove index entries by selecting and deleting the relevant **index fields**.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W853 Indexing_3.docx...

1   Click on the **Home** tab, then click on **Show/Hide** ¶ in the **Paragraph** group to display index fields

2   Navigate to the bottom of page **3** and position the cursor to the left of *{XE "environment"}* in the last paragraph

This marked entry is not necessary, as environmental is part of the name of an organisation…

3   Press Del

You will notice that the field is highlighted (selected)…

4   Press Del to delete the field

5   Repeat steps **2** to **4** to delete *{XE "habitat"}* on page **6** (*Turtles*)

6   Ensure the **Home** tab is active, then click on **Show/Hide** ¶ in the **Paragraph** group to hide the index fields

7   Save and close the document

In the South East region in Australia, large numbers of the Trapdoor spider exist in the location of several AGE businesses and these will be looked at very closely. The Trapdoor is reliant on the condition of the ground, in particular the soil. AGE will investigate the possible effects of run-off and soil erosion, caused by local businesses, on populations of the spider. AGE will communicate closely with the Goring's Plateau Environmental{ XE "environment". } Alliance in this matter.¶

2

In the South East region in Australia, large numbers of the Trapdoor spider exist in the location of several AGE businesses and these will be looked at very closely. The Trapdoor is reliant on the condition of the ground, in particular the soil. AGE will investigate the possible effects of run-off and soil erosion, caused by local businesses, on populations of the spider. AGE will communicate closely with the Goring's Plateau Environmental{ XE "environment". } Alliance in this matter.¶

3

Turtles¶

Turtles are heavily dependent on water for their survival. Turtles are acutely susceptible to habitat destruction or deterioration associated with the expansion of human activities. This is exacerbated by the fact that turtles experience late maturity, extreme longevity and low adult mortality. In fact, nearly 50% of living species are listed as endangered or vulnerable.¶

5

For Your Reference…

To **remove index entries**:

1. Click on the **Home** tab then click on **Show/Hide** ¶ to display the index fields
2. Position the insertion point to the left of the **index field** that you want to delete
3. Press Del twice

Handy to Know…

- If you have been indexing a document or checking the index marks, don't forget to click on **Show/Hide** ¶ to hide the fields before adjusting pagination, as the fields disrupt pagination (on-screen only) and the document will not print as it appears.

GENERATING AN INDEX

Generating the index is probably the easiest part of the whole indexing process. Once all of the index entries have been **marked**, you then only need to position the cursor at the point in the document where you want to insert the index (typically near the end of the document), and then decide on the desired **format** and layout of the index. Word will do the rest.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file W853 Indexing_4.docx...

1. Press `Ctrl` + `End` to move to the end of the document

   A heading for the index is already created – the insertion point should now be below the heading...

2. Click on the **References** tab, then click on **Insert Index** in the **Index** group to open the **Index** dialog box
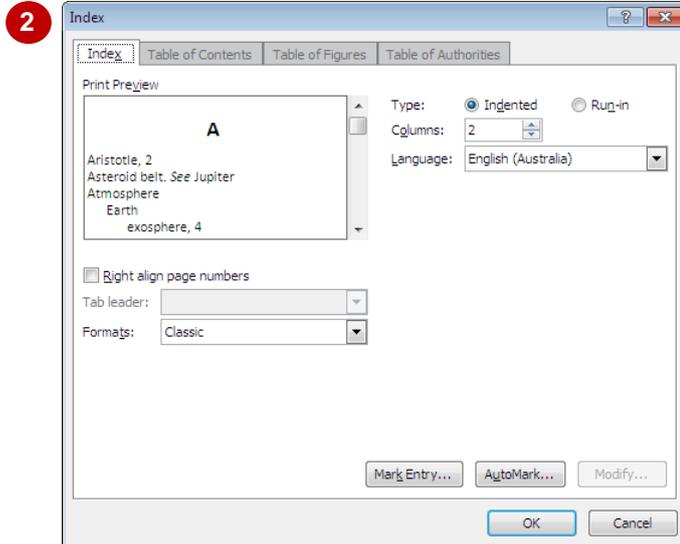
3. Ensure **Indented** is selected for **Type**, then click on the drop arrow for **Formats** and select **Classic**

4. Click on **[OK]** to generate the index

   A two-column index will be created from the index entry fields in the document…

5. Ensure the **Home** tab is active, then click on **Show/Hide** ¶ in the **Paragraph** group to hide the field codes

6. Save the document

For Your Reference…

To **generate an index**:

1. Position the insertion point
2. Click on the **References** tab, then click on **Insert Index** in the **Index** group
3. Make your selections
4. Click on **[OK]**

Handy to Know…

- To delete an index, click in the index and then press `Shift` + `F9` to display the **index field**. Select the index field and then press `Del`.

MODIFYING THE INDEX FORMAT

Once you have generated your index, you may want to make adjustments to the formatting and layout of the index to meet, for example, document or organisational requirements. For instance, you might want to apply a three-column format, or perhaps you would prefer to apply a different format altogether. You can modify the format of an index in the *Index* dialog box.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W853 Indexing_5.docx...

1. Press Ctrl + End to move to the end of the document, then click in the index

2. Click on the *References* tab, then click on *Insert Index* in the *Index* group to open the *Index* dialog box

   You will make some changes to the format…

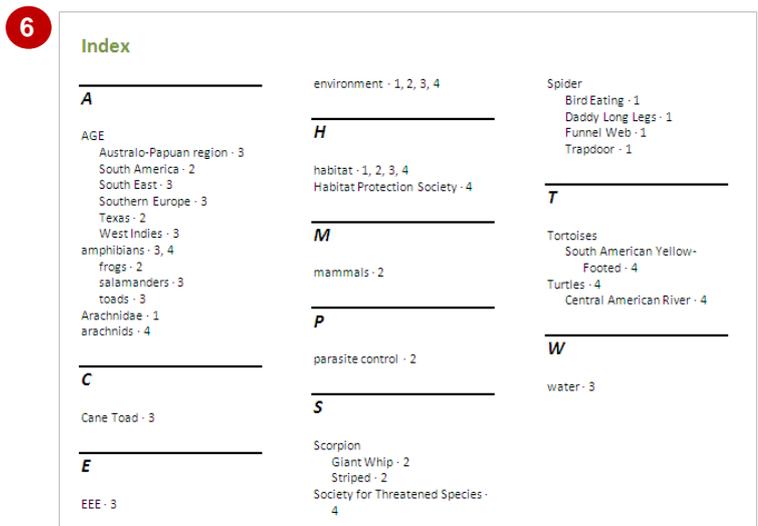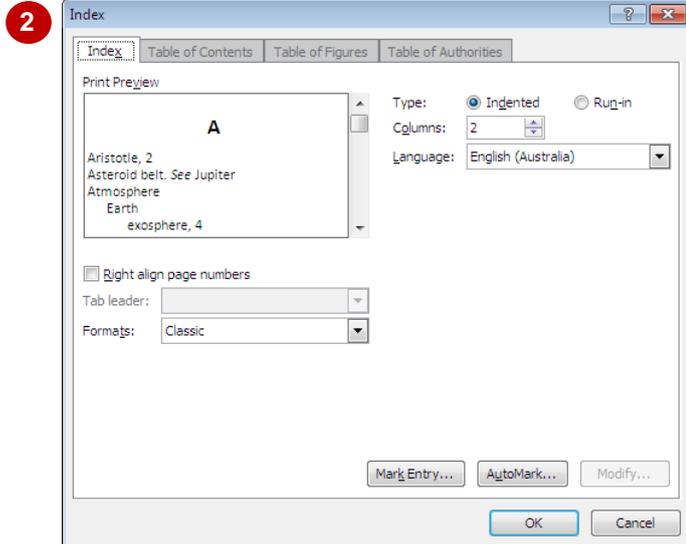3. Click on the up arrow for *Columns* to change to *3*

4. Click on the drop arrow for *Formats* and select *Modern*

5. Click on **[OK]** to apply the changes

   You will be asked if you want to replace the current index...

6. Click on **[OK]**

   The index will now display the formatting changes…

7. Save the document

For Your Reference…

To **modify** the **index format**:

1. Click in the index
2. Click on the *References* tab, then click on *Insert Index* in the *Index* group
3. Make the required changes, then click on **[OK]**, then click on **[OK]**

Handy to Know…

- You don't need to rely on the limited range of formatting options in the *Index* dialog box. You can apply any formatting to an index as you would to any other text in the document. However once you update the index any formatting will be lost. One solution is to modify the index styles: *Index 1*, *Index 2* etc.

UPDATING AN INDEX

An important and time-saving aspect of indexing in Word is that you are able to automatically *update the index* when changes have been made in the document. This feature ensures that if you add or remove any index entries to or from the document, or alter the pagination, the modifications can then be automatically incorporated into the index at the click of a button.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W853 Indexing_6.docx...

1 Navigate to page **2** and position the cursor immediately before the heading *Frogs*

Let's change the pagination of the document first...

2 Press Ctrl + Enter to insert a page break, thereby forcing the text to the next page

Now let's update the index...

3 Press Ctrl + End to move to the last page, then click on the index

Notice that the entry for "frogs", under "amphibians" is currently listed on page 2...

4 Click on the *References* tab, then click on *Update Index* in the *Index* group

"frogs" will now be listed on page 3…

5 Save and close the document

FROGS

Except for the very cold regions of the world (e.g. Antarctic, Arctic, Greenland etc), frogs are distributed broadly around the globe. Typically they are not found in high altitudes, preferring low to mid range elevations. The largest numbers and diversity of frogs are found in the neo-tropical environments of Central and South America and the West Indies. The diversity of frogs in these regions is almost five times that in the Australo-Papuan region.

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For Your Reference…

To *update an index*:

1. Click on the index
2. Click on the *References* tab on the ribbon
3. Click on *Update Index* in the *Index* group

Handy to Know…

- You can also right-click on an index and select **Update Field** to update it.
- You can also press F9 to update an index.

NOTES: