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TYPEFI™

USER GUIDE:

Typefi 8 Indexing

Automation for print, online and mobile



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1.0

Introduction

Typefi's Indexing Module enables you to create indexes embedded in your content for better workflow and for easy re-use.

The Indexing Module integrates Microsoft® Word indexing with Adobe® InDesign® indexing, seamlessly transforming Microsoft Word index tags into equivalent InDesign index entries, while also embedding the index markup in the underlying XML. Indexes created or embedded into Word documents can easily be used to generate the index in InDesign or for XML formats, future-proofing your index.

Index Extras enhance and extend InDesign's indexing feature. Index Extras:

- allow custom formatting within index entries (e.g., applying italics or bold)
- feature automatic inclusion of headings and/or keywords as index entries
- ensure that long paragraphs that split across pages are listed as a page range
- give you the choice of letter-by-letter or word-by-word sort order.

Index	
F	
fisherman	13, 14, 17, 20, 21, 22, 26, 105, 106
M	
magic	9, 10, 25, 43, 87, 108, 109, 111, 112, 122, 123, 142
P	
Places	
China	1, 83, 84, 85, 87, 88, 89, 91, 97, 111, 113
S	
slaves	6
Sultana	6
T	
travel	11, 32, 33, 35, 50, 124, 143
W	
Women	
Scheherazade	1, 2, 3, 5, 6, 12

An automatically generated index.

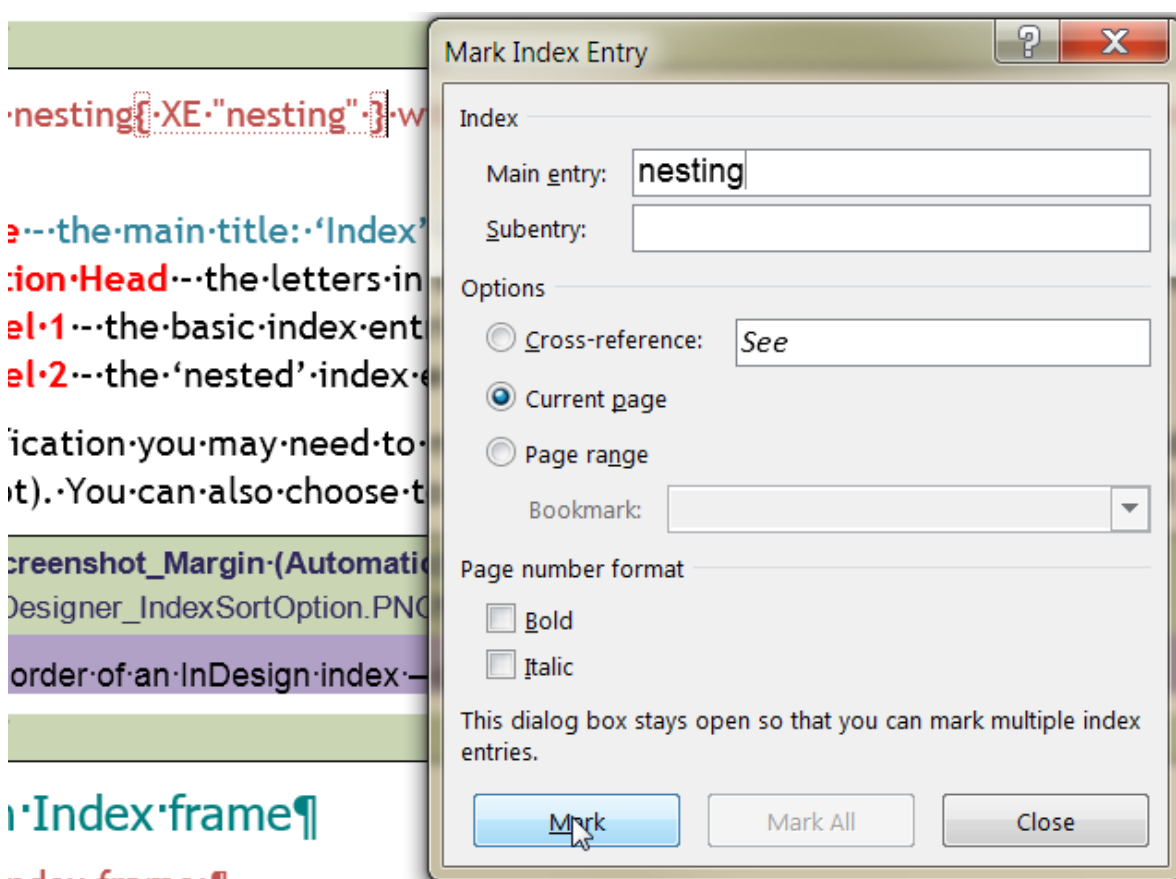
Indexing in Microsoft Word

There is already powerful indexing available in Microsoft Word, and Typefi Publish makes use of this feature.

Microsoft Word includes built-in tools for marking index entries:

- for an individual word, phrase, or symbol
- for a topic that spans a range of pages
- that refer to another entry.

When you select text and mark it as an index entry, Microsoft Word adds an XE (Index Entry) field that includes the marked main entry and any cross-reference information.



The Microsoft Word Indexing dialog with text marked for inclusion in an index

XE fields are hidden text and don't normally display within a document, but they can be toggled via the **Show/Hide ¶** button.

(For general information on creating Microsoft Word index entries, see the [Create an index and update an index](#) article on the Microsoft Office website.)

Professional indexers often prefer to use external indexing programs like **CINDEX™** or **SKY Index** to build their index outside of Microsoft Word and then use a tool **DEXembed** or **WordEmbed** to convert this stand-alone index into an embedded index that can be flowed through Typefi Publish.

XE (Index Entry) fields

XE field codes can be used to control how an index entry appears. Most, but not all XE field codes are supported. When you view an XE field in your document, the syntax looks like this:

```
{XE "Text" [switches]}
```

"Text"

This is the text you want to appear in the index. For example:

```
{XE "Machiavelli"}
```

Subentries can also be entered where each level is separated by a colon (:).

```
{XE "Machiavelli:The Prince"}
```

Entries may also have custom sorting overrides by inserting a semi-colon (;) between the entry and the sort text.

```
{XE "Machiavelli:The Prince;Prince, The"}
```

Switches

Switches may be appended to the XE field code. Here are the available ones:

\B

applies bold formatting to the page number of the entry (can also be combined with \i).

\I

applies italic formatting to the page number of the entry (can also be combined with \b).

\R Bookmark

inserts as the entry's page number the range of pages marked by a specified bookmark

```
{XE "Machiavelli" \r Machiavelli}
```

\T "Text"

inserts text in place of a page number (text must be enclosed in quotation marks). i.e., a cross-reference index entry

```
{XE "Machiavelli:Il Principe" \t "See The Prince"}
```

Character styling

There are some constraints. Indexes generated within Microsoft Word support **local** character formatting within the "Text" **switch** of an XE field, while Typefi Publish requires styles within an index entry to be applied using **explicit character styles**. (For more information on user styling, see next chapter **Indexing in Adobe InDesign CS6 and CC**).

Indexing in Adobe InDesign CS6 and CC

While some organisations prefer to create indexes manually after a document has been produced, it is easy to produce an automatic index with all the required features of a traditional index. Typefi Publish harnesses the power of the InDesign native indexing feature, and allows authors to use the standard Microsoft Word indexing feature.

Typefi Index Sections

A template needs to have a Typefi **Index Section** added to it that has its own master pages containing **Index Frames**. Index frames are the new Typefi Frame type now included in Typefi Publish 6.

The screenshot shows the 'Index' section configuration dialog. Key elements include:

- Section Name:** Index
- Section Type:** Index (circled in red)
- Master:** IXF-Index First (circled in red), IX-Index Continued
- Starts on:** Right Side
- Filler:** [None]
- Repeat Last Master:** ☒
- Page Numbering:**
 - Style: 1, 2, 3, 4...
 - Mode: Continue from Previous Section
- Text Before:** Section Prefix, Section Marker
- Field:** [None]
- Text After:** [None]

The Typefi Index section type (drop-down menu circled to show the new choice) uses master pages with frame type set as 'Index'.

Index Paragraph Styles

The index will be styled with the **default** InDesign Index styles, so it is necessary to create and modify those style definitions if you want the index to look different to the standard InDesign index. Those styles are named **Index Title**, **Index Section Head**, **Index Level 1**, **Index Level 2**, and so on. Depending on how many levels of 'nesting' are needed, more styles may be defined. (Word only offers nesting to one level in its indexing dialog.)

Generate Index

The screenshot shows the 'Index' dialog box in Adobe InDesign. At the top, the 'Title' is set to 'Index' and the 'Title Style' is 'Index Title'. There are buttons for 'OK', 'Cancel', and 'Fewer Options'. Below these are checkboxes for 'Replace Existing Index', 'Include Book Documents', and 'Include Entries on Hidden Layers'. A 'Book Name' field is also present. A 'Nested' dropdown menu is set to 'Nested'. Below this are checkboxes for 'Include Index Section Headings' (checked) and 'Include Empty Index Sections'. The 'Level Style' section has four dropdowns for 'Level 1' through 'Level 4', all set to 'Index Level 1' through 'Index Level 4' respectively. The 'Index Style' section has four dropdowns: 'Section Heading' (Index Section Head), 'Page Number' ([None]), 'Cross-reference' (Index Cross-reference), and 'Cross-referenced Topic' ([None]). The 'Entry Separators' section has six text input fields with dropdown arrows: 'Following Topic' (empty), 'Between Entries' (;), 'Page Range' (^=), 'Between Page Numbers' (,), 'Before Cross-reference' (.), and 'Entry End' (empty).

The InDesign Index dialog (expanded to show all options).

The index dialog allows the assignment of paragraph styles to the index. To access it:

- 1 Choose **Window** ► **Type & Tables** ► **Index** to open the **Index** panel.
- 2 Choose **Generate Index** from the Index panel menu.
- 3 Click **More Options** (located under the **Cancel** button) to view additional settings.
- 4 Accept the default settings or modify them as necessary to determine how your index section will be formatted.
- 5 Click **OK**.

The index styles will be generated automatically when the job is run by the author.

Note: The index dialog is a standard InDesign feature. For more information about indexing in InDesign, see <http://tinyurl.com/indesign-indexing>

More levels of nesting within the index are available in InDesign than are offered in Word. Therefore, you only need to create the following paragraph styles:

- **Index Title:** The main title: 'Index' (which could be set to span columns, for instance)
- **Index Section Head:** The letters in alphabetical order that form headings for the index entries
- **Index Level 1:** The basic index entries followed by page numbers
- **Index Level 2:** The 'nested' index entries that appear under a topic heading

Another modification you may need to make is to the **default sort order**. The standard sort order places symbols before Roman text characters, followed by numbers, and so on. You can also choose to include or not include certain categories.

Include	Priority	Script	Header Type
<input checked="" type="checkbox"/>	1	Symbol	
<input checked="" type="checkbox"/>	2	Roman	Basic Latin
<input type="checkbox"/>	3	Numbers	
<input type="checkbox"/>	4	Greek	

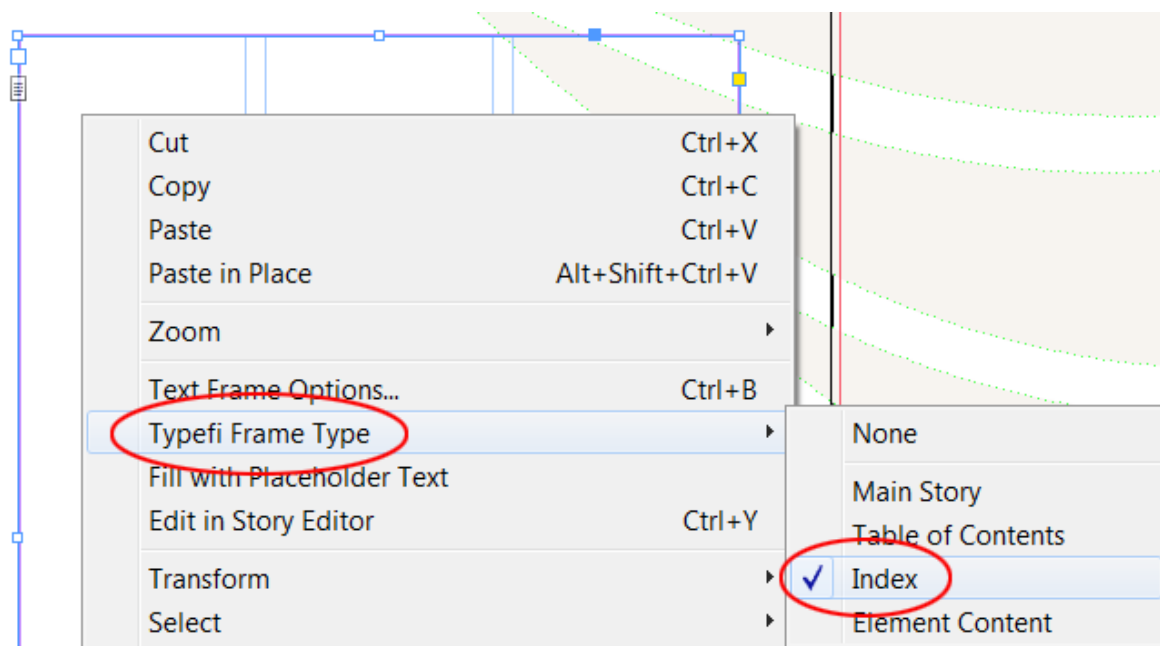
The default sort order of an InDesign index. Click the up/down arrows to change the order.

Creating an Index frame

To create an Index frame:

- 1 Open the master page used for your index and create a regular InDesign text frame for the index.
- 2 Select the text frame with the Selection Tool.
- 3 Choose **Object ▶ Typefi Frame Type ▶ Index**. Alternatively, right-click the frame and choose **Typefi Frame Type ▶ Index** from the context menu.

Tip: You may want to set up the Index frame with multiple columns since most indexes use two- or three-column layouts.



Applying the Typefi Index Frame type to a text frame.

The index master page can now be defined in a new Typefi Section called **Index** (or whatever is necessary for your template) that will be used to generate the index pages. As with the Table of Contents, you may need a second master for subsequent index pages. The author does all the indexing preparation using the standard Word indexing feature.

XML Converter

The Typefi (DOCX to CXML) Converter can natively transform Microsoft Word XE (Index Entry) fields into XML markup. The transform method is controlled by the **Converter.properties** file.

The Typefi (DOCX to CXML) Converter is installed locally for use with Writer and Typefi Print jobs and on the Publish Server to extract XML from checked-in documents. Enabling support for indexing requires modifying the Converter.properties file at both local and server locations. The local copy can be found at \Program Files (x86)\Typefi\Publish\FileManager\lib; and the server version at \Program Files\Typefi\Publish\Server\context\conf or /Applications/Typefi/Publish/Server/context/conf.

Note: You must restart FileManager or Publish Server for any changes to the Converter.properties file to take effect.

The first change is to enable the **index.handling** property in the Converter.properties file:

```
# index.handling [ IGNORE | CHAR_STYLE | CXML ]
#index.handling = IGNORE
#index.handling = CHAR_STYLE
index.handling = CXML
```

Lines starting with a hash (#) symbol are comments and are ignored by the converter. To enable Microsoft Word XE (Index Entry) field conversion:

add a hash symbol in front of `index.handling=IGNORE`; and

remove the hash symbol from in front of `#index.handling=CHAR_STYLE`.

Note: do not enable `#index.handling=CXML` as this is not supported with Designer 5.x.

Further down are three additional properties that determine which InDesign character styles are used for index page number style overrides to be applied by the \b and/or \i XE (Index Entry) field switches:

```
index.page.number.bold.char.style = Index Bold
index.page.number.italic.char.style = Index Italic
index.page.number.bold.italic.char.style = Index BoldItalic
```

Note: {XE "dog" \b} where the \b switch applies a bold character style override to the index page number.

The first line in the example above indicates that InDesign uses the character style Index Bold for style overrides in the generated index. If you use page number style overrides and the character styles which you use have different names than the ones in the properties file, change the properties file accordingly (or change the style names in the template to match the names in the properties file).

For more information, see [Field codes: XE \(Index Entry\) field](#) article on Office.com.

Note: Typefi Publish does not support the \f or \y switches.