

Creating Indexes with Microsoft Word

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1 Introduction

This guideline describes how to mark index entries in Microsoft Word and automatically create an index. In addition, it explains how to create multiple indexes.

Microsoft Word offers two ways to mark index entries with XE fields:

1. Manually mark individual words or phrases
2. Automatic mark index entries with the help of a list of terms (concordance file)

The first approach marks the index entries within the document using the Mark Entry dialog box. One can read through the manuscript to be indexed or manually search for predetermined search terms. The index entries are then created by hand for the respective index. Alternatively, a concordance file can be created. It is the basis for auto-marking the index entries. This procedure can be used in the following situations:

- The index entries are already available as a list. When writing the manuscript, they can be collected into an open concordance file.
- There is already a concordance file with normalized search terms. Only an update is necessary.

A disadvantage of this second approach is, that Microsoft Word also marks keywords on pages where they are not significant. This is because all places where the search term is mentioned are marked.

2 Manually marking individual words or phrases

In principle, the creation of the index should only take place after the completion of the manuscript. This will avoid additional effort. The index does not have to be constantly updated and renewed during the process, but it is created once at the end.

Step 1

Index entries are marked with {XE} fields that are not visible in the document itself. Instead, they are formatted as hidden text. To view these fields, first select *Display* ▶ *Hidden Text* in Word options (see Fig. 1). Alternatively, you can display "hidden symbols" on the ribbon under *Home* ▶ *Paragraph*; select the "Show/Hide ¶" icon (see Fig. 2) or use the key combination Ctrl + *.

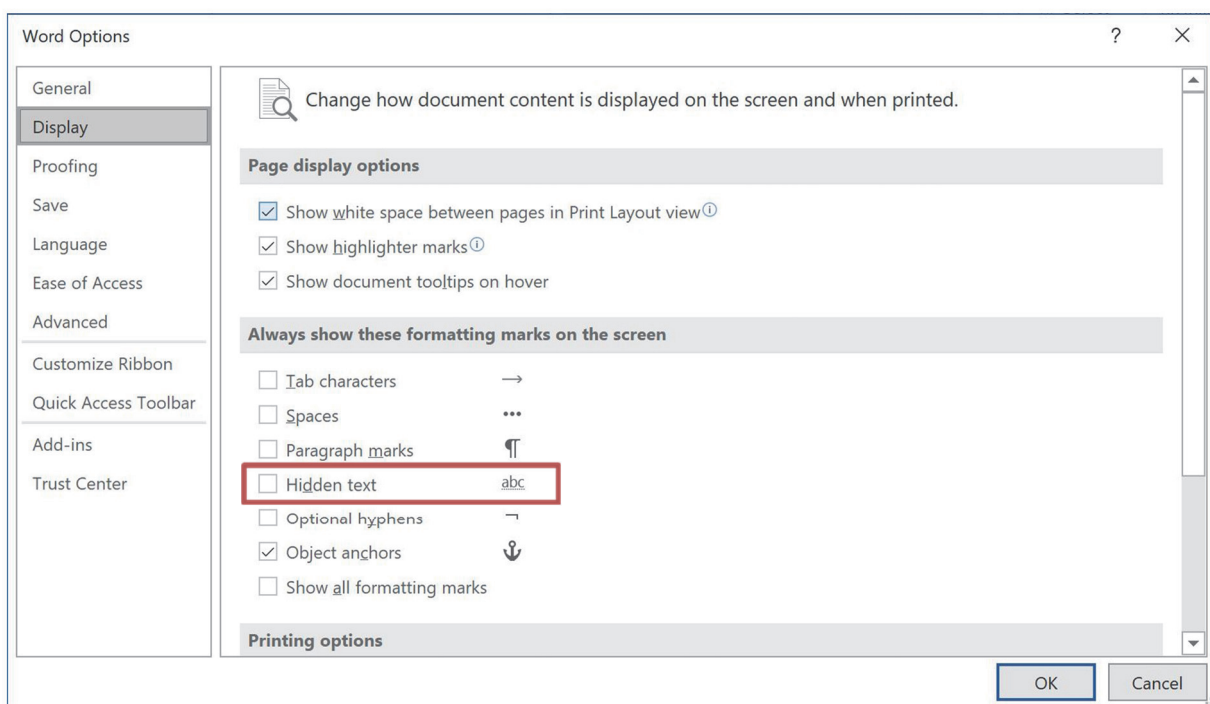


Figure 1: MS Word display options: *Hidden text*.

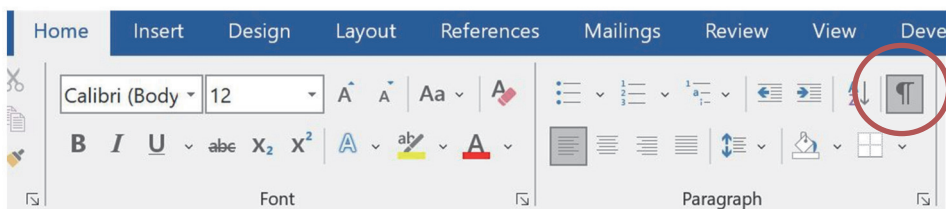


Figure 2: Show/Hide ¶ icon

Step 2

In order to mark an index entry, you must first select the corresponding text and use the *Mark Index Entry* dialog box (Ribbon: *References* ► *Index* ► *Mark Entry* [see Fig. 3]). Otherwise, the key combination Alt + Shift + X can be used here.

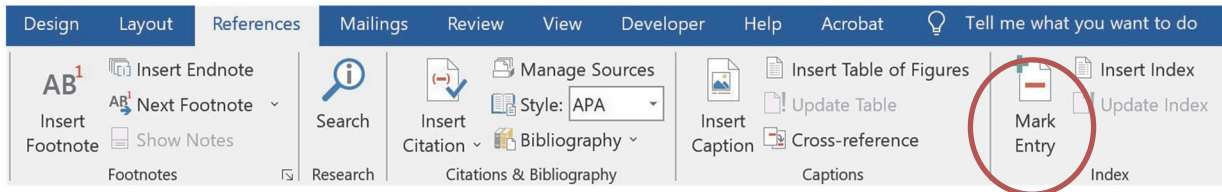


Figure 3: Mark Entry.

When you mark an entry, a *Mark Index Entry* dialog box appears with the word you selected in the *Main entry* field. You can then modify this term and the modification will appear in the index while still being linked to the term in the text that you selected. This can be used to modify a term slightly – like changing a plural to a singular – or to link specific terms in the text with a general entry in the index.

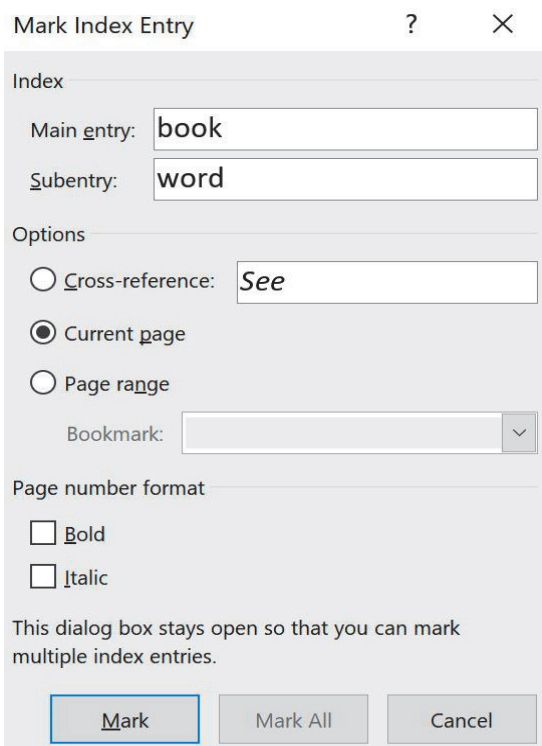


Figure 4: Set Index Entry.

As an example, figure 4 marks the term “book”. This was selected before the dialog box was opened and the term appears automatically in the *Main entry* field (however, still without the completed subentry “word”).

Note: You should change the term to the standard form (normally nominative, singular) that you want to appear in the index. In addition, pay attention to the formatting of the term in the *Main entry* field, which by default will follow the formatting of the selected term in the text. It must be set to *standard* font (i.e. not bold or italic) because the formatting is taken over in the index and would otherwise have to be subsequently adjusted with each new index creation.

If the index entry is marked without modification, then the manuscript text appears in the index with the current page number. Alternatively, as described previously the *Main entry* field in the dialog box can be edited directly to change what appears in the index, but the entry will remain anchored to the XE field in the manuscript.

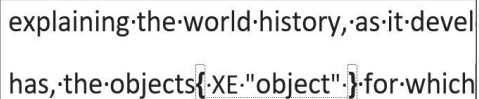
The *Subentry* field can, as the name suggests, can be filled with a keyword that will be subordinated to the main entry in the index. For example, the main entry *Book* can receive the subentry *Word* (see Fig. 4). With this function, only one subentry can be assigned to each main entry at first. If several subentries are desired, a different subentry must be created for each given main entry, for example *Character*, *Table* or *Page*.

In the section *Options* of the dialog box, you can choose between *Cross-reference*, *Current page* and *Page range*. By default, the index entry is referenced to the current page number of the marked term. *Cross-reference* can be useful if the index entry should refer to another index entry. The default text *See* can also be replaced with a corresponding term. The *Page Range* option can be used to link an index entry to a bookmark. Before this, there must be a bookmark defined in the document, which typically identifies a specific page range.

The *Page number format* section lets you set the formatting of the page number in the index to **Bold** and/or *Italic*. This can be useful if you want to differentiate where index terms appear, for example, using *italic* for footnotes and **bold** for tables while regular font indicates material in the main text.

Step 3

Click the *Mark* button to complete the definition of the current index entry. When this is complete, the dialog box for entering other index entries remains open. Thus, for example, additional subentries for the same main entry can be added by typing a new term in the subentry field and clicking *Mark* again. When the dialog box is no longer needed, click the *Cancel* button to close it.



explaining the world history, as it develops, the objects{XE "object"}

Figure 5: Example of a marked index entry.

When you mark an index entry, it inserts a hidden {XE} field into the document following the text that is selected. These {XE} fields are marked with curly braces {} (see Fig. 5). The text inside the quotation marks represents the entry as it should appear in the index. A subentry is separated from the main term using a colon (example: { XE "main entry:subentry" }). You can manually edit the {XE} fields at any time, and once they are inserted into the document, this is the only way to change.

Following the entry in quotation marks, a so-called *switch* can be integrated to modify the index entry. Selecting the options for **bold** or *italic* page numbers in the dialog box results in the switches “\b” and “\i” respectively (example: { XE "main entry:subentry" \b }). Other switches can be added to the {XE} field manually. A table of possible switches is given at the end of this document in section 5.5.

In the dialog box, if you instead select the *Mark All* button, all occurrences of the marked term in the current document will be marked. In addition, when you generate an index, the resulting entry will include every page number where the term appears.

There is one exception to the *mark all* function. It marks only the first occurrence in a paragraph. So, if a term occurs twice in the same paragraph and these appear on separate pages, only the first will be recorded. This is because the second page number for that paragraph does not need to be provided in an index, so there is nothing that needs to be done to change this function.

After you have marked an index entry, you can select a new term in the document and click again on the dialog box. The term you have just selected will now appear in the *Main entry* field and you can modify and mark it as described above. In this way, you can leave the dialog box open and go through the document, marking all of the index terms as you go.

Step 4

Once you have indexed all the terms, you can hide hidden text again using any of the methods described in Step 2.1. This is necessary because the hidden text include all of the {XE} fields you have inserted, make the document longer and change the pagination. When you hide hidden text, the pagination and also the page count are displayed again as they are in print and the correct page information will be generated when you generate the index.

To generate an index from the terms you have marked, follow the menu path: *References* ▶ *Index* ▶ *Insert Index*. Then the field function *Index* is selected. There are various setting options that can determine how many columns the index should have and whether the subentries should be displayed continuously or indented.

Note that a generated index will not be used in typesetting. Instead, the {XE} fields will be taken into the typesetting program and a final index will be generated using the final pagination from the page proofs. Nevertheless, generating an index in MS Word is a good way to check the entries that you have marked. So you can correct any errors.

3 Automatic marking of index entries with the help of a Concordance file

bookx	chapter:bookx
booksx	bookx
carx	carx
vehiclex	carx
wordx	wordplay:wordx

Figure 6: Example of a small concordance file.

A *concordance file* is a Microsoft Word document that is used to mark index entries. This Microsoft Word document contains a simple two-column table (see Fig. 6). The left column contains the search terms that are to be automatically marked as index entries. It is important, to make sure that the search terms are displayed exactly as they appear in the target document. This applies not only to the grammatical form (singular, plural, inflections, etc.), also to the case of the terms.

The right column includes all entries, as they should appear in

the index. If the search term from the left column is to be taken as it is into the index, the right table column can remain free. When introducing a subentry, it is important that the main entry is recorded first followed by a colon and then the then the associated text.

The output from figure 6 would thus be:

```
chapter
  book, #
car, #
wordplay
  word, #
```

Note the creation of subentries and the collection of page numbers for “car”, and “vehicle” under the index entry “car”.

Step 1

First display hidden text by one of the methods discussed above: select *Display* ▶ *Hidden Text* in Word options (see Fig. 1); select the “Show/Hide ¶” icon on the ribbon under *Home* ▶ *Paragraph* (see Fig. 2); or use the key combination Ctrl + *.

Step 2

To use a concordance file to automatically mark the index terms, follow the path *References* ▶ *Index* ▶ *Insert Index* (see Fig. 7).

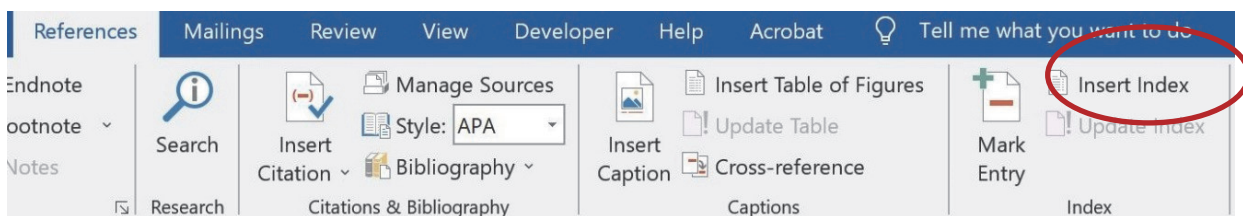


Figure 7: Insert Index.

Step 3

In the *Insert Index* dialog box, select the *AutoMark* button (see Fig. 8). This will open another dialog box where you can navigate to and open the concordance file. Word will then automatically index all the terms in the file. If hidden text is already switched on, the target document immediately shows which terms have been included in the index. This can be seen in the {XE} fields that were inserted throughout the document.

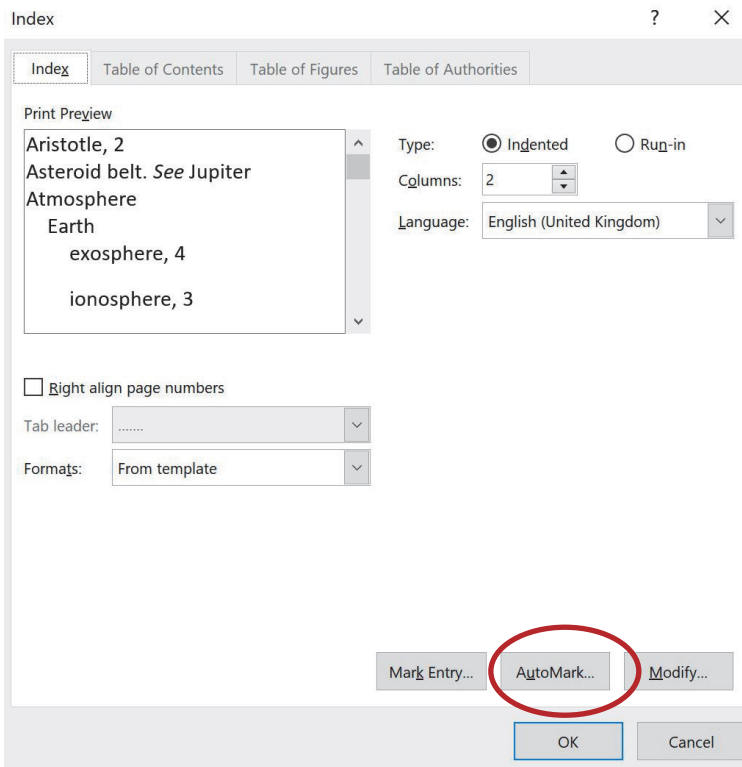


Figure 8: Concordance File Selection.

Step 4

As described above, once you have indexed all the terms, you should turn off hidden text before generating an index from the terms you have marked so that the correct page numbers appear in your index (see Step 2.1). To insert the index, follow the step outlined above in Step 2.4.

4 Marking multiple indexes

4.1 Inserting the \f-switch manually

Step 1

Please follow one of the two above variants to mark the index entries.

Step 2

Suppose you have a name index and a subject index. In each index entry (which appears in hidden text as `{ XE "Term" \f "a" }`), you can insert the **switch** `\f` with an identifier for the corresponding index in quotation marks (see Fig. 9). The index identifier can be as simple as a letter, so this can look like: `{ XE "Term" \f "a" }` and `{ XE "Term" \f "b" }`. You can also name the switch after the index type: `{ XE "Term" \f "Name" }` and `{ XE "Term" \f "Subject" }`.

Note: The dots in the above sample `{ XE }` fields represent the hidden symbols for spaces that appear in the hidden text view, which is the only way to view `{ XE }` fields. Please do not copy the above examples from this document, but enter the switches yourself in Word, using spaces where indicated.

A motor vehicle { XE "car" \f "a" }, also known as motorized vehicle or automotive vehicle, is a self-propelled vehicle, commonly wheeled, that does not operate on rails (such as trains or trams) and is used for the transportation { XE "transportation" \f "b" } of people or cargo. ¶ The vehicle { XE "car" \f "a" } propulsion is provided by an engine or motor, usually an internal combustion engine or an electric motor, or some combination of the two, such as

Figure 9: Assigning the Switches in the Index Entries.

Advice: Once you enter a switch for one index, you might find it goes faster to copy/paste that switch into all of the `{ XE }` fields for that index throughout the document before going on to the next index. This means several passes through the document but require less typing and it can work especially well with entries that are distinctive for one index, such as citations general terms.

Step 3

As described above, when you have indexed all the terms, you should turn off hidden text so that the correct page numbers appear in your indexes (see Step 2.1).

Step 4

If you want to check your index entries by generating indexes in your Word document, the method for inserting multiple indexes is different from inserting one index.

First, place the cursor at the place where you want to create the first index. On the ribbon menu, follow the path *Insert* ▶ *Text* ▶ *Quick Parts* and then select *Field*. From the *field names* list, select the name *Index*. Then click *Field Codes*. You will see the *Advance field properties* displayed now. After "INDEX" (which appears automatically), enter a blank space and then the switch for the index you are inserting; ex. "INDEX \f "a"" (see Fig. 10). Confirm your entry by selecting *OK*. The named index has now been created.

For the other index(es), simply repeat this process for each separate index; the only change is that the switch name must be adjusted accordingly: `\f "b"`, `\f "c"`, `\f "d"`, `\f "e"`, etc.

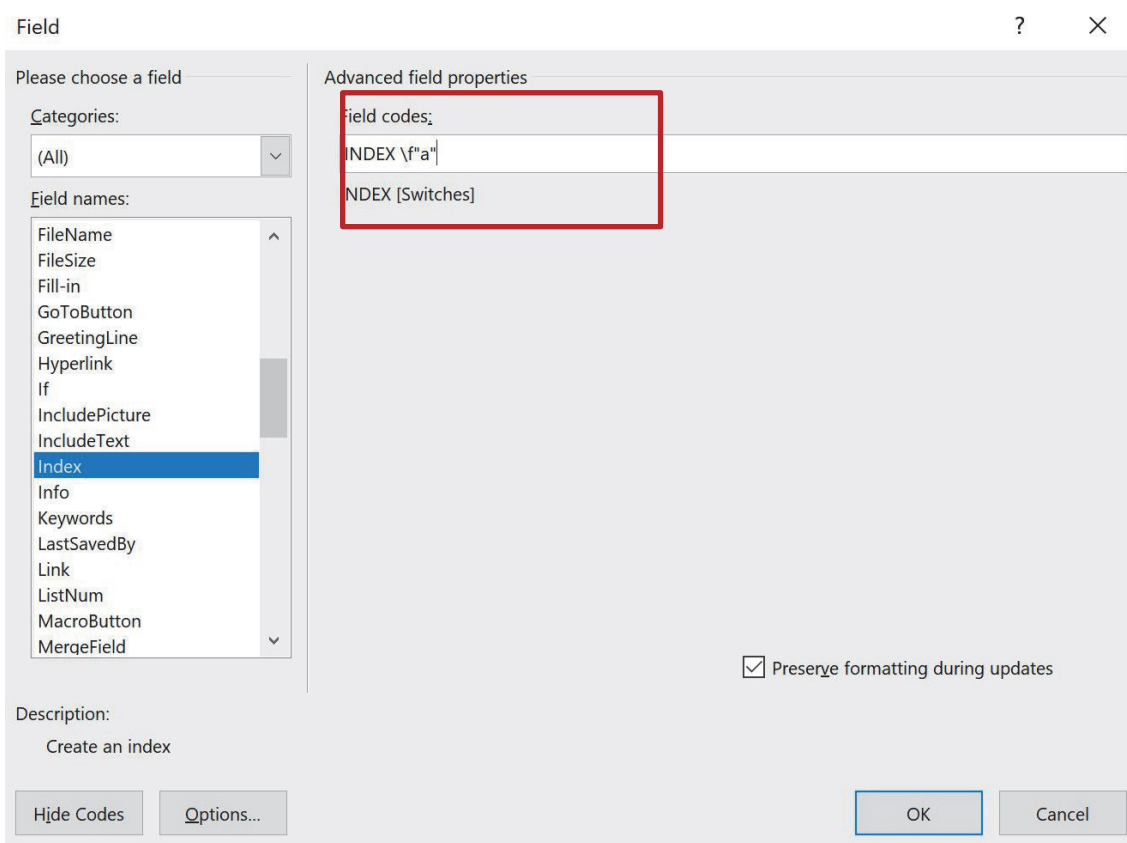


Figure 10. Create index with switch.

4.2 Multiple indexes using the concordance file

Using a trick, you can insert the \f-switch with the concordance file, too, to produce multiple indexes automatically. E.g. “s” for index of subjects, “n” for index of names:

Perestroika	Perestroika" \f s
Mikhail Gorbachev	Mikhail Gorbachev" \f n

Attention to use the (correct) quotation mark (insertion is possible via *Insert/Symbol*, too).

The field command to write the index should then be: { INDEX \f n } for index of names and { INDEX \f s } for the index of subjects.

5 Making basic changes to the indexing

5.1 Search for index entries

A search for a specific index entry can be done via the *Find and Replace* dialog box, which you can open from the basic search function by selecting *Advanced find...* or *Replace...* To search for a particular word, such as "form", enter into the search field:

```
^d XE "form
```

It is important to make sure that there is a space between d and XE and between XE and the quotation mark. Note also that a second quotation mark is not used. It is not necessary to enter the entire term; a few characters are already sufficient.

5.2 Changing index entries

To change an index entry after it has been created, you need to manually edit the {XE} field. If the quotation marks are deleted by mistake, they can easily be added again. The changing can include changing the main term between the quotation marks, adding a subentry with a colon (ex. { XE "form:fill in" }), or adding a switch to the entry.

5.3 Updating index entries

If one or more index entries have been changed, an update must be performed on the index itself. This is done as follows:

- place your cursor anywhere in the index and press the F9 key. This will update all fields in the index.
- Alternatively, select the entire document by pressing Ctrl + A (which will thus include the index) and press the F9 key.

In order to make sure that all fields are updated before each print operation, the checkbox *Update fields before printing* can be selected under *File* ▶ *Options* ▶ *Display* ▶ *Print Options*.

5.4 Delete index entries

If an index entry is not needed and should be removed, the entire field including the curly brackets {} must be deleted from the text. To find this index entry in the Word document, use the *Search and Replace* dialog box as describe above in 5.1.

While you can manually delete each {XE} field from the text, you can also remove them with the *Replace* function by leaving the *Replace with* field empty. To complete the process for an entire index entry (thus removing all associated {XE} fields), use the *Replace All* button.

5.5 Overview of field switches for marking index entries

Switch	Description of the switch
\b	Sets the page number in bold during the index generation.
\f	Assigns an entry to a particular index; ex. { XE "term" \f "a" }. You can only assign one index for a particular entry.
\i	Sets the page number in italics during the index generation.
\r	Connects the index entry to a page range instead of a single page. To use this switch, you must first create a bookmark in MS Word; the field then reads: { XE "term" \r "bookmark" }
\t	This flag lets you add text to the end of an entry. This is a good way to include a cross reference; ex. { XE "term" \t "see also second-term" }

5.6 Overview of field switches for inserting indexes

Switch	Description of the switch
\b	Builds an index for the portion of the document marked by the specified bookmark. The field { INDEX \b Select } builds an index for the portion of the document marked by the bookmark "Select".
\c	Creates an index with multiple columns on a page. The { index \c 2 } field creates a two-column index. You can specify up to four columns.
\d "Separators"	Used with the \s switch, specifies the characters (up to five) that separate sequence numbers and page numbers. The field { INDEX \s chapter \d ":" } displays page numbers in the format "2:14." A hyphen (-) is used if you omit the \d switch. Enclose the characters in quotation marks.
\e "Separators"	Specifies the characters (up to five) that separate an index entry and its page number. The { INDEX \e ";" } field displays a result such as "Inserting text; 3" in the index. A comma and space (,) are used if you omit the \e switch. Enclose the characters in quotation marks.
\f "Identifier"	Creates an index using only the specified entry type. The index generated by { INDEX \f "a" } includes only entries marked with XE fields such as { XE "Selecting Text" \f "a" }. The default entry type is "I".
\g "Separators"	Specifies the characters (up to five) that separate a range of pages. Enclose the characters in quotation marks. The default is an en dash (–). The field { INDEX \g " to " } displays page ranges as "Finding text, 3 to 4".
\h "Heading"	Inserts text formatted with the Index Heading style between alphabetic groups in the index. Enclose the text in quotation marks. The field { INDEX \h "—A—" } displays the appropriate letter before each alphabetic group in the index. To insert a blank line between groups, use empty quotation marks: \h "".
\k "Separators"	Specifies the characters that separate an index entry and its cross reference. The { INDEX \k ":" } field displays a result such as "Inserting text: See Editing" in the index. A period and space (.) are used if you omit the \k switch. Enclose the characters in quotation marks.

<code>\l</code> "Separators"	Specifies the characters that separate multiple-page references. The default characters are a comma and a space (,). You can use up to five characters, which must be enclosed in quotation marks. The field { INDEX \l " " } displays entries such as "Inserting text, 23 or 45 or 66" in the index.
<code>\p</code> "Range"	Compiles an index for the specified letters. The field { INDEX \p a-m } generates an index for only the letters A through M. To include entries that begin with characters other than letters, use an exclamation point (!). The index generated by { INDEX \p !-t } includes any special characters, as well as the letters A through T.
<code>\r</code>	Runs subentries into the same line as the main entry. Colons (:) separate main entries from subentries; semicolons (;) separate subentries. The field { INDEX \r } displays entries such as "Text: inserting 5, 9; selecting 2; deleting 15".
<code>\s</code>	When followed by a sequence name, includes the sequence number with the page number. Use the \d switch to specify a separator character other than the default, which is a hyphen (-).
<code>\y</code>	Enables the use of yomi text for index entries.
<code>\z</code>	Defines the language ID that Microsoft Word uses to generate the index (note: 1031=German; "1033"=English).

The second list of switches is taken directly from: <https://support.microsoft.com/en-us/office/feldfunktionen-index-feld-adafcf4a-cb30-43f6-85c7-743da1635d9e?ui=de-de&rs=de-de&ad=de>