Using Microsoft Word's Indexing Software/Pagination
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Robert Bloom: The Story of a Working Musician

Word's *Create an Index* explains: "Word can automate most of the work involved in creating an index and allows for easy updates and formatting changes. To create an index, first mark your index entries by providing the name of the main entry and the cross-reference in your document, and then create the index itself." It goes on to break down each step with easy to follow instructions.

In my research phase I also read articles such as the one contributed by John McGhie titled "How do I generate an index in Word?" and posted on the MVP (Most Valuable Professional Microsoft website). McGhie, a professional indexer, begins by stating, "The Microsoft Word help suggests that you can automatically generate an index. Sorry, but you can't (the result looks like an index, but the reader can't use it). You can automatically mark index entries; however, the amount of work required to edit the result into a useable index is usually double the effort required to manually mark the index entries one-by-one."

I am very happy not to have followed McGhie's advice! Apparently not all books or their indices present equal challenges, for I fear that I might have given up or out had I tried going mano a mano with my entries.

However, I did have to do some fancy maneuvering to complete my task using Word's automated indexing procedure. As an author I found myself with the challenge of indexing a book that had already been printed on 9x12-inch pages, resulting in pagination that was different from the pagination of the original manuscript done using Word. (I'm revealing my inexperience, but wouldn't this also be the case for an author indexing the galley proof of a book just prior to printing?) Since I sensed that this index was destined to be lengthy and complex, I could not conceive of creating it the old fashioned way with note cards, without using a program. After rejecting McGhie's advice and spending a bit of time experimenting, I discovered a few creative steps that allowed me to use Word's indexing software to create an index that I feel comfortable presenting to readers.

More easily demonstrated than described, nonetheless here is an attempt to share the techniques that I developed:

First, put all of the text into one Word document. Combining what were separate documents for each chapter, I converted my 467-page printed book into one long Word document of over 700 pages. To fit more text on each page even before working with font size (since the larger pages of my printed book accommodate a larger amount of text than does a page of my Word doc), my very first step was to reduce all four of the margins of the Word doc page.

Now go through and create several inches of space in the Word doc that match exactly the page breaks of the printed pages. (Understand that, for now, the spaces defining the printed book's page breaks can fall anywhere on the Word doc pages.) This spacing will add even more pages to the working document, which is of no consequence. Type the book's page number on the line above the first line of text of that page; ignore where this falls on the Word doc page.

If your photo captions are in separate docs as mine were, go through and type in or cut and paste in the caption at the end of the text for each page that includes a caption or captions. Layout is not important, only content and page breaks.

Now you are ready to use the Word indexing program. I asked it to mark every entry for the titles, proper names, institutions, locations, nouns, and topics I chose to index. Again, do not pay any attention to the pagination that the index is giving to your entries while you are completing this selection process since obviously it will give page numbers that correspond to the Word doc (which are ever-increasing in number as you work) and not to the pagination of your printed article or book.

Microsoft's instructions on how to tag entries are easily followed; clearly described is how to highlight and mark either just that particular entry or every entry of the highlighted text. (Most often I tagged every entry and later weeded out inconsequential entries.) There are many considerations that you will discover as you work; e.g., even though you highlight a name that appears first name first in the text, it's good to change the entry to last name first at the time you are tagging the entry so that last names are alphabetized in the index as you make each entry, saving later editing work. You will soon create a system for handling last names that appear in the text without a first name (or first without last) and last names that are shared. Keep track in a notebook exactly what word or phrase you use for topics and subtopics so that you are indexing references consistently as you move through the text. Decide when (if ever) to use quotation marks around an entry since any word or words in quotation marks is/are moved to the top of the index. (I chose not to use quotation marks for any entries.) Be aware that entries that begin with numerals will be moved to the top of the index. I chose to use some numerals deliberately to highlight entries such as 80th and 95th birthdays.

I did all of this using 14 point font just to make working on creating an index easier on my eyes!

With the entry task completed, the instructions clearly describe how next to hide the entries (which will shrink the number of pages of the Word doc) and then how to create the Index, doing so and saving it periodically as you work. Saving your work at regular intervals is crucial since lost work leads to tears shed (fortunately only a one-time occurrence for me, but it was a whole day's work. What was I thinking?), but everyone knows this. My downfall was not realizing that very long Word docs "save" in sections. But everyone probably knows this as well.

When selection is completed and entries are hidden and the index is formatted for the entire Word doc, print out the working index (for content, still ignoring the pagination discrepancy) and go through to eliminate entries that are not important, create more nests as appropriate, etc. This is important work; the success or failure of the index depends on its logical and instructive organization. Return to the electronic file and make these changes manually in the Index, which still is not referencing correct page numbers.

Once you have all the entries correctly set up and have edited the Index, and with the entries "hidden," the final step is to choose Select All and reduce the font of the entire Word document to as small as you need to get the pagination of the Word doc to correspond to the pagination of your already printed or laid out in galley proof article or book. You can experiment with a couple of sizes to see which size captures the entire text for most of the printed pages on your Word doc page. For my project, this font was smaller than I could comfortably read (5 point, I believe) but remember, at this point you are done with content and your only remaining task is to correlate page numbers. As I scrolled through the Word doc, using the book's page numbers that I had typed in as a guide, I needed occasionally to adjust the spaces I had created to indicate page breaks to exactly correlate with the book's page breaks; I also needed on occasion to reduce the text of a single page even more to fit on one page to correspond exactly to the pagination of my book if that page was particularly rich. Remember--layout of text on the page is inconsequential. Your only concern is to fit all the text of each page of the book on to one page of the Word doc, regardless of how it is laid out on that page.

Backing up for a moment, I need to mention what is perhaps obvious, that it is important to have page one of your Word doc correspond to page one of the book. That means that before creating the final

Index, you need to insert blank pages in the beginning of the Word doc if the book has blank pages at its beginning; in other words, if the text begins on page 3 of the book, be sure that the text in your Word doc begins on page 3 as well. Also, be sure to insert blank pages or title pages between chapters in the Word doc to correspond exactly with the layout of the printed book; also insert blank pages to indicate a page with, e. g., photos or music but no text to continue setting up the pagination of the Word doc to correspond exactly to the pagination of the printed book. Type the book's page number anywhere on these blank pages in your Word doc just as a reference; when all steps are completed, it will correspond with the Word doc's page number.

My book starts with a dozen or so pages that are numbered i, ii, iii, iv, v, etc. I put this text (which included two pages for the Table of Contents) at the end of the Word Doc and made myself a chart, corresponding i to page 468, ii to page 469 and so forth. Then I manually corrected the Index, changing references to page 468 to page i, page 469 to page ii, etc.

The most complicated task in creating an index is nesting subtopics. After completing the Index for this 467-page book crammed with important topics/subtopics, I definitely wished I had known when I started what I knew when I ended! There is really no way to anticipate the very best organization, but the caveat is to take your time before starting and sketch out some nests, and think some more, and sketch some more, and think some more again before you begin! The index is a roadmap to best usage of the information in the book and is in its way your stand-alone commentary on the hierarchy of that information.

I found the task baffling technically before designing the above process but having resolved that, I found that nesting was even more challenging intellectually and emotionally since it forced me constantly to ask myself, "What can be found in this book?" and "What keyword is likely to be used by a reader?" and "What do I want the reader to learn?" perhaps even more intensely than I did when writing it.

The final task is to look at every page in the Word doc and confirm that its content exactly corresponds with the printed page with the same page number. Then ask the program to create the final version of the Index...and hit "save"!

The indexing program formats the index into two columns and alphabetizes entries automatically. (I was happy with the standard format but it can be customized if it does not serve your purpose.)

Once you have finalized your index, choose a font for the index that seems comfortably legible for the average reader while being space-efficient and then paginate the index itself and voila!