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Indexing Your Family History

By Mike Blackledge.Com



During the year just passed, our Albuquerque Genealogical Society established a Special Interest Group on Writing and Publishing. The group met several times to discuss subjects relating to getting your research into publication. Of the six subjects, nothing captivated the interest of the participants more than a demonstration of indexing – to see how one could easily create an index, how the embedded text to do this was in every narrative report created by our genealogy software programs, and how we can add to that index and format and modify it. This column provides some of the steps you can accomplish to ensure your family history includes a first-rate index.

Do you know what a biennial vegetable is? One that requires two (2) growing seasons. Do you know what kohlrabi is? Kohlrabi is a biennial vegetable, a low, stout cultivar [a plant variety that has been produced in cultivation by selective breeding] of cabbage. Kohlrabi can be eaten raw as well as cooked; you can eat the stem or the leaves. Not a big fan club for kohlrabi.

So: In 2000, the **American Society of Indexers** (ASI) designated that the official vegetable of the Society would be the kohlrabi because “no one knows what we are, or what to do with us.”

I beg to differ. We genealogists very much appreciate the work of indexers. We love these guys (kohlrabi, not so much) because the **Index** is what we love about published non-fiction. I would estimate that 95% of folks that pick up a non-fiction book at Barnes & Noble immediately open it to the front, to the title page and the table of contents – and anyone who does the opposite, who starts in the back with the index, is, by definition, a genealogist. If there is no index, we genealogists tend to denigrate the work. Or perhaps ask **Howard Henry** to index it for us.

We all know what an index is: a guide, in an electronic or print form, used to locate information in documents, files, publications, or a group of publications. The traditional **back-of-the-book index** is a list of words that point to where those words [or ancestors] can be found in a document. The words or phrases are selected by an indexer and the pointers are page numbers, paragraphs, or section numbers. In a family history or genealogical report, it is listed in alphabetical or numerical order, primarily arranged by surnames.

All non-fiction books should have an index, but not all of them do. There are even some family histories published with no index. Browse the 929.2 aisle of any large Public Library and you will find a spectrum of publication quality from the very professional to the rather crude. But certainly no index should not be the case for our *own* family history – a book we write and publish ourselves – and in the 21st Century! How can we ensure we have a solid and useful index? How to make our personal genealogical history into a useful genealogy source?

Part of the answer lies with The Magic Button – as we learned in the previous [Nov 2016] *Quarterly*, any software genealogy program worth its salt has the capability to produce narrative reports ready to publish as family histories. We called this feature “**The Magic Button**” because if you ‘push the button’, a book comes out! (well, usually just a chapter as it takes more pushes, more steps to produce a book ... like creating an index.)

But we didn’t spend time on a cleverly hidden charm of the Magic Button: that within every narrative report so produced, the indexing work has already been accomplished for you. You can’t see it when you read the report and most people don’t realize it’s there as it won’t show up unless you push one more button, but it’s there. It is embedded in every such generated

What is indexing?

Indexing is a system used to represent information from a document so that those conducting searches can retrieve the information easily.

“An index can be viewed as an alphabetized list of items that direct the searcher to further information.” 1

report, just waiting for you to call it forth. We will take a look at how this is accomplished, and what you can do to enhance the process.

Word Processors: Let's start with the basics: word processors are one of the two software tools that made personal computers personal and useful. (the other is spreadsheets, e.g., Lotus 1-2-3). This column has claimed that our genealogy software program, be it Brothers Keeper, Legacy, RootsMagic, whatever – is the most valuable tool the 21st Century genealogist can own and operate. But the ubiquitous word processor is not far behind.

A bit of background: on early computers, word processing began with text editors: relatively simple programs used for typing, copying, pasting, and printing text (a single character, or strings of characters). Text editors do not format lines or pages. Word processing added to the text editor the ability to control type style and size, to manage lines (word wrap), to format documents into pages, and to number pages. Functions now taken for granted were added incrementally, sometimes by purchase of independent providers of add-on programs. Spell checking, grammar checking and mail merge were some of the most popular add-ons for early word processors. Word processors are also capable of hyphenation and the management and correct positioning of footnotes and endnotes. In our lifetimes, word processors have evolved from standalone dedicated computer hardware [e.g., Wang 1200 WPS, 1976] up to today with web-based word processors such as Office Online or Google Docs [cloud-based computing].

Not every word processor can generate an index. **Debbi Wedemeyer** called Apple support to convince herself that Pages, her favorite word processor that now comes free with the Mac as part of the iWork productivity suite, does not have the capability to take your genealogy narrative report and automatically generate an index. The call convinced her – if you want a 'generated' Index, consider moving to Word on the Mac, or Word or WordPerfect on the PC.

What if you want to use a word processor other than Microsoft Word or Corel WordPerfect? You will need to check it out on your own. For example, Legacy gives this 'warning' to users:

"The ability of a word processing program to interpret the RTF files produced by Legacy and duplicate the report format, generate Indexes and Table of Contents, etc. **will vary from word processor to word processor** as well as between different versions of each. Because of this, we do not provide support for working with word processors. Each company that makes a word processor has its own technical support and system of Help files and/or manuals to guide their users."

Microsoft Publisher is in several ways a Microsoft Word on steroids, designed to do all the publishing steps required to produce a first-class newsletter such as this Quarterly, or even a complete book. Microsoft will tell you that the difference from Word is that Publisher emphasizes page layout and design rather than text composition and proofing. For genealogists, for our purposes, we need a top-drawer word processor. Microsoft Word and Corel WordPerfect can do everything we need, as can Office Libre, but not many of the 'provided' word processors such as Works, Pages, Notes, all those free software packages that are basically enhanced text editors.

During the late 1980s and into the 1990s the predominant word processing program was WordPerfect. It had more than 50% of the worldwide market as late as 1995, but by 2000 Microsoft Word had 95% market share. WordPerfect is still preferred by many law firms. For the purpose of this column on indexing, we will give examples from Microsoft Word which (as Debbi will tell you) is available on both PCs and the Mac. These Word remarks apply to Word 2016, Word 2013, Word 2010, Word 2007, plus Word 2016 for Mac.

Hidden Characters: the next concept we need to understand is that within every document created by Word, there are many, many characters that we cannot see with the naked eyeball. They do not show up on our monitor screen, they do not print, yet ... they are there! Magic, right? And they are important: These non-printing characters are required for computers and printers to render formatting properly but which are not a part of the content, so they are hidden. If you think about it, what have we said makes a word processor superior to a text editor? It is the ability to format the text, to control word-wrap, page and section breaks, multi-column printing, and on and on. All of these features are accomplished by commands that must be relayed to your monitor or to your printer; these commands are called out by hidden characters.

Show or hide formatting marks: Now, here is the cool part: we can actually see these unseen commands, these hidden characters, if we want to, whenever we want to. They still won't print, but we can see them on the monitor screen! Get into your word processor and open any document – yes, any document, as we said they all

have hidden characters. In the taskbar (the control bar or ribbon at the top of the page), look for the Paragraph Symbol (it looks like this: ¶) Do you see it? If you don't, you need to do a little research on your version of Word, or on the word processor you are using to display hidden characters. That symbol is usually found near the middle of the task ribbon at the top of Word. Click on it – you won't hurt anything, as this symbol is just a toggle switch to allow viewing (or not) of hidden characters. You can click them 'on' and then 'off.'



Above is the “start paragraph” symbol

These particular hidden characters are called **formatting marks**.

You will see several different hidden characters besides the symbol, which is named “paragraph symbol” as it designates to the formatting: “start a new paragraph following this mark”. Formatting marks like dots (...) for spaces or arrows (→) for tab characters are used in Word to show the text layouts of documents. You might find these formatting marks useful when you're designing content with a specific look in mind. We're not going to spend more time on this and other formatting symbols, as our interest here is Indexing.

Embedded Index: Once we accept the presence of hidden characters in Word documents, we're ready to appreciate “Magic Button #2” provided by top word processors to operate on genealogical reports. The secret behind this second Magic Button is that whenever you generate a narrative report, your software genealogy package will also mark all your database names in the report for indexing, embedding the results as hidden characters, and thus doing much of the work of a publishing house indexer specialist. Thanks to these two tools, all you have to do is to push yet another magic button and voila! A beautiful, multi-column index will appear! Let's examine this 'gift': Take any .rtf file generated as a narrative report from Legacy or RootsMagic or whatever genealogy software program you use. [If you don't know how to produce a narrative report, this might be a good time to review the previous *Quarterly* column on *The Magic Button*.] You want to save your narrative report as an .rtf file [Rich Text Format] and not a .pdf file, as PDF [Portable Document Format] is just an image of your document, like a photo of what your printer would produce. Thus PDF is a great format to send your camera-ready pages to a publisher for printing, but is not the vibrant collection of individual characters to edit and work with in a word processor.

Open your narrative report – any .rtf narrative report so generated – in your word processor such as Microsoft Word. Now toggle on/click on that ¶ paragraph symbol, and what do you see? After every name in your report, you can now view an Index entry. Here is a sample of lines of printout without the toggle on:

2. **Patrick Verne WILSON** was born on 13 May 1961 in Atkinson, Holt Co, NE.¹

Patrick Verne WILSON and Laura Marie CORNHUSKER were married on 9 Oct 1982 in Omaha, Douglas Co, NE.^{1,3} They lived in O'Neill, NE in 1991. **Laura Marie CORNHUSKER**¹³ was born on 10 Jan 1960 in Omaha, Douglas Co, NE.

And here we see those same lines once we have clicked on that paragraph symbol:

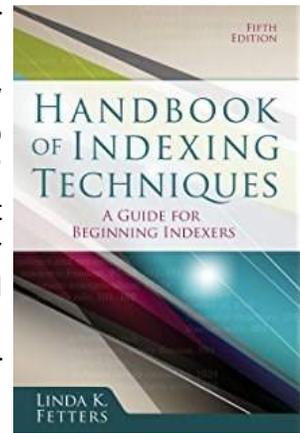
2. {xe “WILSON:Patrick Verne”}**Patrick Verne WILSON** was born on 13 May 1961 in Atkinson, Holt Co, NE.¹

Patrick Verne WILSON and Laura Marie CORNHUSKER were married on 9 Oct 1982 in Omaha, Douglas Co, NE.^{1,3} They lived in O'Neill, NE in 1991. {xe “CORNHUSKER:Laura Marie”}**Laura Marie CORNHUSKER**^{1,3} was born on 10 Jan 1960 in Omaha, Douglas Co, NE.

Can you spot the differences? Some hidden characters are now highly visible! We see them in curly brackets “{“, “}”, and with the designator **xe** (for Index Entry). They also have the index material enclosed in quotation marks, with the surname first, followed by a colon, then followed by the given names. If the surname is all caps (all upper case), that is because that is how you designated surnames to be listed in your genealogy database program. In this example, I didn't show you all the spaces and all the formatting marks, as I want you to notice the additional index entry characters, now that they are no longer hidden. These index entries were inserted for us by our [Legacy, RootsMagic, etc.] software package (what a bargain that package is!).

So now we know we have what we need for the content of our Index. To actually produce the

Index is a snap: still in Word, just move the cursor to where you want your Index to appear, say at the end of the document; and then under References, just click on **Insert Index**. A dialog box will appear, showing a Print Preview of the format for a sample index, and allowing you to format your Index as to number of columns, leading tab characters (such as a straight line, or 'dots' from the entry to the page number), and other choices. Again, nothing to hurt – try it out! You don't have to save what you come up with; just see what your options are. Once you generate your Index, try selecting one surname – you'll see that every surname in your index is selected, so if you format one, you format all of them. Thus you can make your surnames in the Index all bold, or all italic, or both – the choice is yours.



Thus it's easy to do an index in a single document. But most of us in our Family History will have several chapters. Let's say, by working in a word processor, you have created several chapters, each in its own file, and now you would like to see what your index might look like. Each file (containing a chapter) has its own name, and since you started with your genealogy software, each file has embedded hidden text: those {XE} field codes for indexing all the names that came from your database.

The secret to creating an index for multiple chapters is ... more hidden text! This hidden text is called Field Codes. Word has more than 50 different Field Codes, for everything from an Author field to a Bibliography field to a CreateDate field to a Citation field. Fields behave like formulas in Microsoft Excel — the field code is like the formula, and the field result is like the value that the formula produces. All field codes exist within curly brackets { }, as we will see. You can switch between displaying field codes and results in your document by pressing ALT+F9. The field code we want is **RD** (for Referenced Document – yeah, not quite as obvious as TOC for Table of Contents field) and we'll see how to use it next.

The RD field identifies a file (like one of your chapters) for Word to go through when you create a table of contents, or an index with the TOC, TOA, or **Index field** [TOA is Table of Authorities, but that is for lawyers, not genealogists!] Of course, before you generate your index, you must first ensure each chapter is page numbered. Manually set starting page numbers in those chapter files you plan to index.

Now we're ready to set up the field codes, the RD field code, which will be formatted as **hidden text**. In your Word taskbar ribbon, click on Insert, then Quick Parts (yes, Quick Parts – I didn't make up these names). Under Quick Parts, click on Field ... Word will produce a dialog table listing those 50 Fields. To simplify that list, under Categories, select **Index and Tables** – this will reduce your choices down to about 7, most of which you know by now!

Click where you want to **insert a field**. Tip: If you know the **field code** for the **field** that you want to **insert**, you can type it directly in your document. First press CTRL+F9, and then type the code within the brackets. Remember, our code will be RD. Note that our code will 'disappear' when you complete the two characters for a legitimate field code; you'll see it as you type the R and then all will disappear as you type the D. Don't panic! Remember that all codes are hidden text! To toggle between viewing the field code and the field code results, press Alt+F9. When you view the RD field in your document, the syntax looks like this:

{ RD "FileName" }

We see the curly brackets and the RD field code. That "Filename" is the file to include when generating a table of contents, table of authorities, or index. For our case, it will be the filename for our first chapter. If it is a long file name with spaces, enclose it in quotation marks. Replace single

backslashes with double backslashes to specify the path, for example:

"C:\\My Documents\\ChapterOne.doc"

My suggestion is that you line up all your ready-to-go chapters in one folder, and generate your index in that folder as well in a nice new 'clean' document. Here is what an Index 'set-up' might look like with three chapter files:

```
{ RD \\f Robert Benjamin Oder.RTF }  
{ RD \\f Kate Blacklidge Johnson.RTF }  
{ RD \\f chp7-2ndEd.doc }
```

We have two RTF files and one Word (.doc) file referenced. We also have an \\f instruction. This \\f indicates that the path is relative to the current document where we are creating our index; otherwise, we would use some lengthy file reference starting from the C: drive.

Once you have your RD field code instructions set up with your chapters, you do an **Insert Index** as you did for a single chapter, and the Index will again appear, but this time with the entries from all of these referenced chapters. As suggested, we placed all our chapters in one folder, and in that folder we create our Index on a nice new document. Try it! You won't hurt anything! I promise! What about adding your own entry in your Index? The Magic Button takes care of all the names in your narrative report, but what if you add more text with those names used and want them in the index, or perhaps you want something else in the Index like counties or rivers or cemeteries or wars? You can hand-edit in those entries, and it is not as difficult as you might think. First **select** what you want indexed in your report, such as **Rio Grande Cemetery**; then under References in the Word ribbon, click Mark Entry. The table resulting will show the entire entry, Rio Grande Cemetery as your primary entry, like a surname. You just want Cemetery for your 'surname' and Rio Grande as your subentry or 'given name' so cut and paste Rio Grande accordingly. Don't forget to click on "Mark All" so the software will go through your report and ensure every Rio Grande Cemetery it finds is captured in your Index. Again, try it out!

If you have problems with these instructions or with indexing, look at the Reference on indexing/wordproblems – or bring your laptop to the February AGS SIG meeting!

Summary: The tools to produce an index for any self-publication that moves our research onto the Library shelf are all on our home computer. The techniques to try out these tools are straightforward and 'won't hurt anything.' A recommended approach is to start with a narrative report from one's genealogy software, examine the characters hidden by toggling the results on and off with the paragraph symbol in Word, then generate an Index to see what our family database has within it, how it will appear as an index, and to correct our database entries accordingly. Then work with the resulting Index to correct typos or add more entries. The reader is encouraged to try these tools – even if they take more than one growing season.

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