**Index marking in Word**

General

To mark up an item for inclusion in the index, highlight the item in the text and press Alt+Shift+X (PC), or Cmd-Opt-Shift+X (Mac) (or go to the References tab and click Mark Entry). The selected item is shown in the 'Main entry' field of the Mark Index Entry dialog (see fig. 1). You can add one subentry in the Subentry field. Click Mark to add the entry at the insertion point.

Word switches the document’s view to display codes (if it doesn’t, go to the Home tab and click the pilcrow symbol or press Shift+Ctrl+8 (PC), or Cmd+8 (Mac)). The index entry is shown as follows:

{ XE: "Constitution:United Kingdom" }

The braces are highlighted and there’s a thin dotted line under the whole entry. (The examples here are entered as plain text for clarity. Press Shift+Ctrl+8 (PC) or Cmd+8 (Mac) to display the above example as a real index item.)

The colon separates the main topic and and the subtopic, and this entry would appear in the index as follows:

Constitution

 United Kingdom 1

The text inside the braces is plain text. The braces are codes. Once the marker is placed you can change the content, but you should not change the XE: identifier. You can delete the marker by deleting either of the braces.

Though the Mark Index Entry window doesn't show it, you can add more subtopics. Add a colon at the end of the last (sub)topic and type the subtopic:

{ XE: "Constitution:United Kingdom:classification" }

InDesign can handle four levels of topic so please don't use more than three subtopics.

To change the sort order of a topic, add a sort-order string. In MS Word you do that by adding the sort-order string after the topic, separated by a semicolon. For example, to ignore insignificant words, repeat the topic name without the insignificant words:

{ XE: "Constitution:in the United Kingdom;United Kingdom" }

The subtopic 'in the United Kingdom' of this item is now sorted as 'United Kingdom', not as 'in the . . .'. You can use digits, letters, underscores in sort-order strings.

**Formatting index entries**

To change the appearance of index entries in the final index, you can apply a character style to any part of the topic names. But you should use a character style, not local formatting. For example, if a topic should appear bold in the printed index, create a character style ‘bold’ and apply that in the index marker. (The formatting doesn’t show in a generated index in the Word document, but *does* appear in the InDesign document.) Make sure that you apply the format to a topic name only: avoid applying it to colons and semicolons. Be precise.

**Principal locators**

To mark locators (page numbers) as principal in the index, bold for instance, check Bold under Page number format in the Mark Index Entry window. This is entered as \b in the index marker. Again, this is plain text and you could add it to any existing index markers, as in the following example:

{ XE: "Constitution:United Kingdom:classification" \b }

Note that the \b code is outside the quotes. When you add \b to an existing marker, make sure you don’t add it inside the quotes.

**Tables of Cases and Legislation**

The tables of cases and legislation are marked up in the Word document using Word's standard index markers. Each table is a list of subtopics with the table's name as the main topic. The name should be formatted so that when the index is created, the tables are easy to isolate in the Typefi workflow. The Table of Cases and the Table of Legislation are marked up as follows:

Entries for the Table of Cases index need to start with zzz1Table of Cases

Entries for the Table of Legislation index need to start with zzz2Table of Legislation

By prefixing the table's name with zzz, it's placed at the end of the index so that we can find it easily; the use of '1' is explained below. The table's name is the name of the topic. (The InDesign template should contain a Typefi section whose name corresponds with the topic name.)

Topics in the tables are marked up as subtopics of the table's main topic. For example,

{ XE: "zzz1Table of Cases:Abbott v Abbott [2007] UKPC 53"}

If the table contains sections and section headings such as such as 'UK' and 'European Union', these headings are added in the index marker as subtopics:

{ XE: "zzz1Table of Cases:UK:Benkharbouche v Embassy of Sudan" }

{ XE: "zzz1Table of Cases:European Union:Abrahamsson and Anderson v Fogelqvist" }

It's not necessary to type those long topic strings: you can copy and paste index markers like other text items. When you do, make sure that you include the two braces. After copying an item you can replace part of the pasted marker as necessary.

If a table doesn't contain any sections, no further formatting is required: all entries are subtopics of the main topic zzzTable of Case. But if there are sections and perhaps subsections, they need to be formatted (a) because they usually do not appear in alphabetical order, (b) there can be several levels of sections, and (c) to distinguish them from entries.

The order in which sections should appear can be set by using Word's sort-order feature. A table can contain topics and subsections, as in this example:

----------------------------------------------------------------

Table of cases

Abbott v Abbott [2007] UKPC 53 175, 178

. . .

Zeital v Kaye [2010] EWCA Civ 159 84

Canada

LAC Minerals

----------------------------------------------------------------

Where Canada is a section heading. In this case, the topics 'Abbott. . .' and 'Zeital. . .' are marked up as usual, no sort-order strings required. 'Canada', however, must be marked in two ways: its sort order should be set so that it appears at the end, and we must also indicate that this is a heading and that it's a level-1 heading. This is the way to do that:

{ XE: "zzz1Table of Cases:Canada\_1;zz1:LAC Minerals" }

The zz1 sort string ensures that the Canada heading is placed at the end of the table. \_1 tells us that Canada is a level-1 heading (this is not a Word feature, so when you generate the index in Word, the level indicator will be visible; it will be deleted in the Typefi output).

Returning to our earlier example, it would be marked up as follows:

{ XE: "zzz1Table of Cases:UK\_1;zz1:Benkharbouche v Embassy of Sudan"}

{ XE: "zzz1Table of Cases:European Union\_1;zz2:Abrahamsson and Anderson v Fogelqvist"}

to indicate that UK and European Union are level-1 headings and that the UK heading should be sorted before the European Union heading.

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Table of Cases

UK

Benkharbouche v Embassy of Sudan 000

European Union

Abrahamsson and Anderson v Fogelqvist 000

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This system is quite flexible. A more complicated example is the following:

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Table of Legislation

Primary legislation

Statutes

Acquisition of Land . . . 000

. . .

Youth Justice and Criminal Evidence Act 000

EU

Charter of Fundamental Rights 000

. . .

Treaty of Rome 000

International

European Convention . . . 000

 Art 2 000

 Art 3 000

Canada

Constitution 000

United States

Bill of Rights

Secondary Legislation

SIs

Atomic Weapons Establishment 000

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These would be marked up in the text as follows:

{ XE: "zzz2Table of Legislation:Primary legislation\_1;zz1" }

{ XE: "zzz2Table of Legislation:Statutes\_1;zz2:Acquisition of Land"}

{ XE: "zzz2Table of Legislation:Statutes\_1;zz2:Youth Justice and Criminal Evidence Act" }

{ XE: "zzz2Table of Legislation:EU\_1;zz3:Charter of Fundamental Rights" }

{ XE: "zzz2Table of Legislation:EU\_1;zz3:Treaty of Rome" }

{ XE: "zzz2Table of Legislation:International\_1;zz4:European Convention" }

{ XE: "zzz2Table of Legislation:International\_1;zz4:European Convention:Art 2" }

{ XE: "zzz2Table of Legislation:International\_1;zz4:European Convention:Art 3" }

{ XE: "zzz2Table of Legislation:Canada\_1;zz5:Constitution"}

{ XE: "zzz2Table of Legislation:United States\_1;zz6:Bill of Rights"}

{ XE: "zzz2Table of Legislation:Secondary Legislation\_1;zz7" }

{ XE: "zzz2Table of Legislation:SIs\_1;zz8:Atomic Weapons Establishment"}

It so happens that all these markers contain level-1 headings, but if there are had been any level-2 headings they'd be marked up as \_2.

Note: when you add sort strings the way we did here – using zz followed by a number – those numbers needn't be contiguous. If you think you might want to add sections somewhere in between, leave gaps. The sort strings zz10, zz20, zz30 result in the same sort order as zz1, zz2, zz3. And with the double-digit gappy range you can insert numbers more easily. Adding letters works too: zz1, zz1a, zz2, zz2a, zz2b, zz3 are sorted in the order shown here.

Tips

**Tip**: You can at any time generate the index in the Word document. This gives you a good idea of how the index is developing and you can fix any errors that you spot. Remember that index markers are essentially plain text items which you can locate by using Word's Find function, Ctrl+F (PC), Cmd+F (Mac).

**Trick**: Once you have entered an index marker you can copy and paste it elsewhere: no need to create the whole marker from scratch. After pasting a marker you can change part of it, e.g. just a subtopic.

**Tip**: In MS Word you can look for whole markers by entering ^d in the 'Find what' field. Note that this finds all field codes, not just index markers, but it's useful all the same.

**Trap**: Index entries are case-sensitive. 'European union' and 'European Union' are two different topics. When the indexing is done, do generate it and check it.

**Trap**: When identically spelled topics are assigned different sort orders, they're considered separate topics:

{ XE: "zzz2Table of Legislation:Secondary Legislation\_1;zz7" }

{ XE: "zzz2Table of Legislation:Secondary Legislation\_1;zz8" }

Would result in two occurrences of the heading 'Secondary legislation'.

**Trick**: InDesign’s indexes allow four levels of subtopic. If that’s not enough, combine the first two levels in the Word document. For example, this marker is illegal:

{ XE: "zzz1Table of Legislation:Primary legislation\_1:International\_2;zz3:European Convention:Art 3" }

because it has five levels of topic. To remedy this, combine the first two by replacing the colon with an at symbol @:

{ XE: "zzz1Table of Legislation@Primary legislation\_1:International\_2;zz3:European Convention:Art 3" }

The combined item will be split during Typefi composition.