

Guide to indexing in Microsoft Word™

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A brief introduction to indexing in Word

Traditionally, indexes were generated by identifying key words, phrases, or topics and writing them on index cards, then searching the page proofs for occurrences of those words, phrases, or topics and writing the corresponding page number on the card, before finally organizing all the cards and typing up an index manuscript.

A better solution for creating an index is the utilization of the index function available in Microsoft Word. **Indexing in this way adds value to the book:**

- Since an index entry is linked to a space within the text, rather than to a page number, the index will be interactive when the book is repurposed into an eBook or other electronic product.
- This method allows for the indexing process to occur in the time before copyediting, or even submission, which allows you more time to concentrate on the page proofs once your book is in production.
- This is a straightforward process that can be completed by you as the author, with your specialist knowledge of your topic.
- Creating your own index is also an alternative to hiring a professional indexer, for which you would likely be responsible for costs.

The process is relatively simple and occurs in one or two basic steps. First, you'll need to tag the index entries in your document, building the index entry by entry. Second, should you want to make any tweaks to the alphabetization of your entries, you'll need to insert the collection of entries at the end of your manuscript.

Indexing in Word is relatively straightforward, and these notes are intended as a brief introduction. More detail can be found via Word's Help menu.

NOTE: T&F can currently only accept XE tag indexes when provided within your original manuscript submission. We are unable to accept XE indexes once your title has been copyedited / typeset.

What you should submit

We ask that you submit the Word file with the index entries embedded and the index list placed at the end. Should there be any changes that you want to make to the layout, order, or content of the index but cannot achieve directly in the automatically generated list, please copy the list to a new Word file and make the changes with "tracked changes" switched on (see below). Your typesetter will then extract the index from the main Word file and incorporate your marked corrections during typesetting.

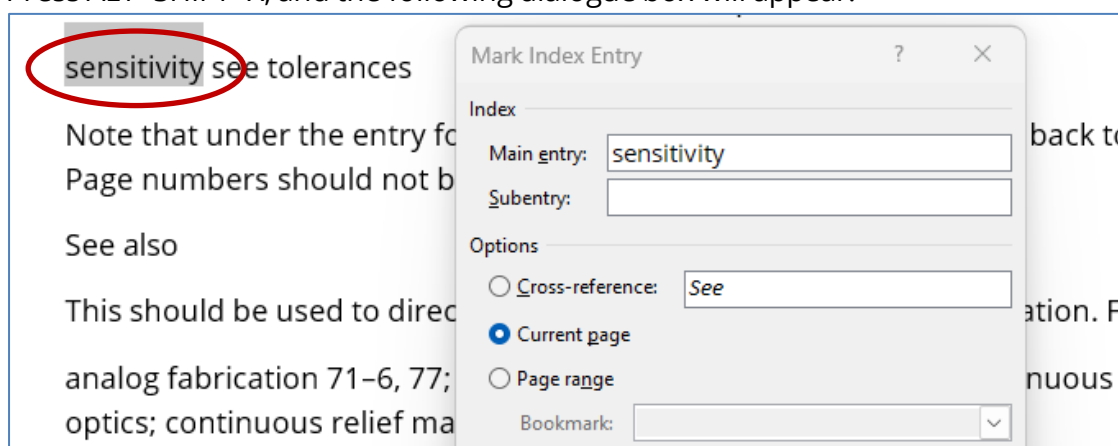
Getting started

We advise that you first review your manuscript and compile a list of terms that you will want to include in the index before you begin tagging (see the “What to include in the index” section below for more info). This will help you decide how you will want to structure your headings, subheadings, and cross references, and will avoid entries being missed.

Indexing a word or phrase

1. Adding a term from the chapter to the Index

To use a word or phrase from the chapter text as an index entry, select the term. Press ALT+SHIFT+X, and the following dialogue box will appear:



Here the word “sensitivity” has been highlighted in the text before pressing ALT+SHIFT+X and appears automatically in the “Main entry” box. It is possible to edit the entry as required.

2. Adding your own term to the Index

To enter your own text as an index entry, place the cursor next to the text that you are indexing without selecting any text. Press ALT+SHIFT+X, as before. You can then type the index term into the “Main entry” box.

3. Adding subentries

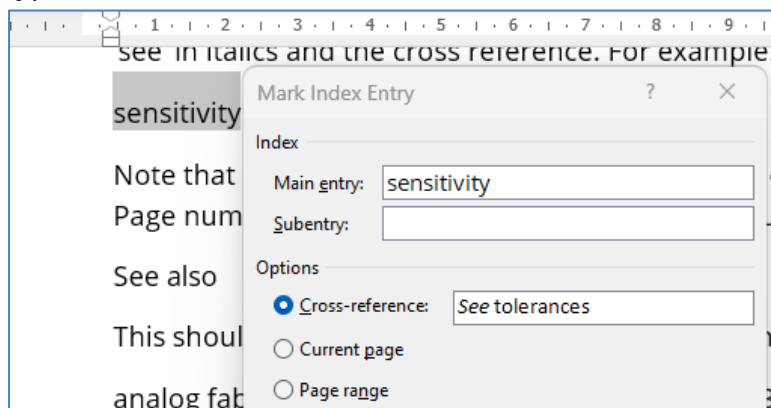
To create a subentry, type the headword in the “Subentry” box below the “Main entry” box.

To create a sub-subentry (third-level entry), type the subentry text followed by a colon (:), and then the text of the third-level entry.

NOTE: For more information on what to include as an entry or subentry, see the “What to include in the index” section below.

4. Adding cross-references

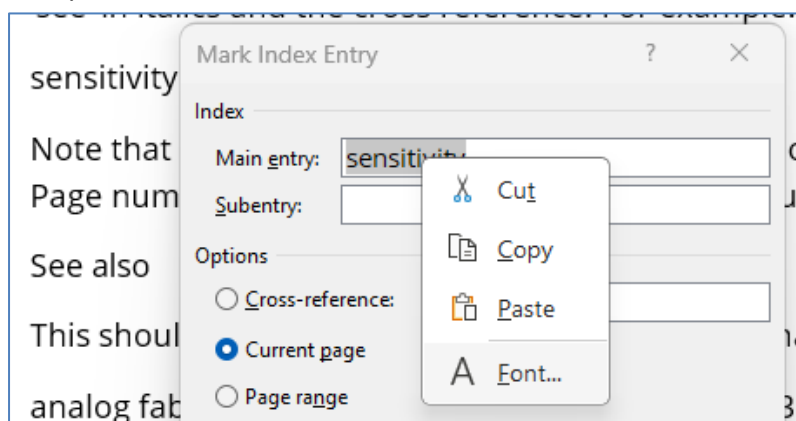
The “Current page” option (centre of the dialogue box) is the default: it simply inserts the page number into the index. If you want to create a cross-reference from the index entry rather than insert a page number, click the “Cross-reference” option and type the cross-reference text into the box:



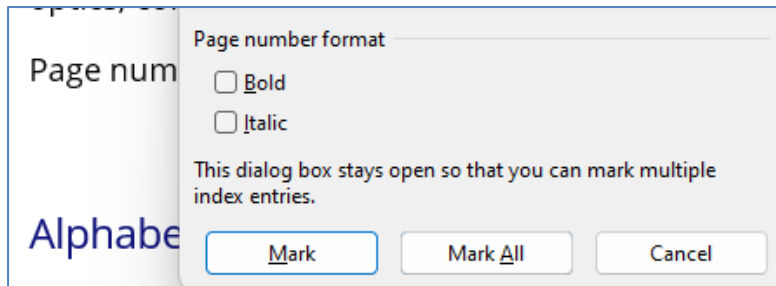
NOTE: Inserting a cross-reference entry does not include a page number reference at the same time. So, if you are including a “see also” cross reference for example, you will have to mark an additional page entry to ensure that the page number also appears in the index.

5. Formatting entries

You can modify the font of a main entry or subentry by selecting it and then right-clicking with your mouse. You can then select options from the font menu (to add styling such as italic for example. Also note that the usual keyboard shortcuts apply here).



Two checkboxes also allow you to specify that the *page number* for this index entry should be bold or italic (check both boxes for bold italic). This is useful for when referencing figures, tables, etc.



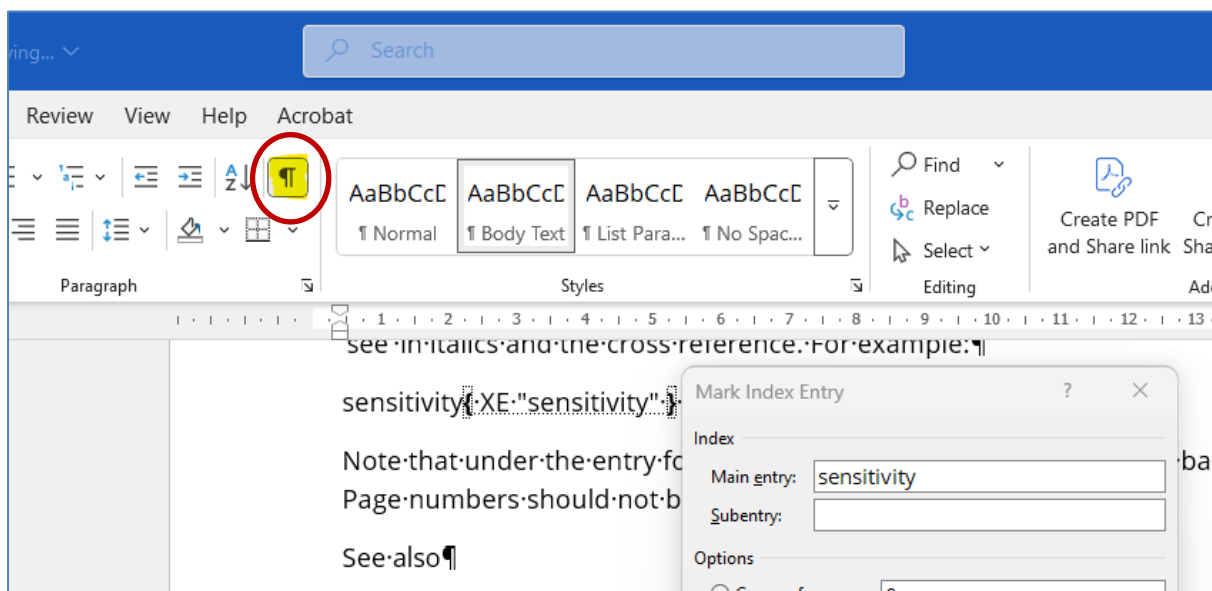
To mark the index entry, click “Mark”. To mark all occurrences of this text in the document, click “Mark All”. Note that the Mark All option is available only if you selected text before opening the dialog box – not if you typed your own text in the dialog box.

NOTE: “Mark All” should be used sparingly and only for very specific, and infrequently occurring, terms. Note that every occurrence of the phrase you’ve selected will be indexed, and there is no guarantee that they will all constitute “significant reference” to this term. This can often lead to long strings of page numbers, often better indexed using the page range option defined below.

6. Compiling entries

You can close the indexing dialogue box or leave it open while you work. If you leave it open, you can move around the document and select new words/phrases to index. When you want to insert a new index entry, click on the dialogue box to reactivate it. Any words that you have selected when you click will appear in the Main entry field.

NOTE: Working in this way will switch on Word’s ability to show hidden formatting symbols. To turn this off again, simply press the “Show/Hide” button in the ribbon, as highlighted below:



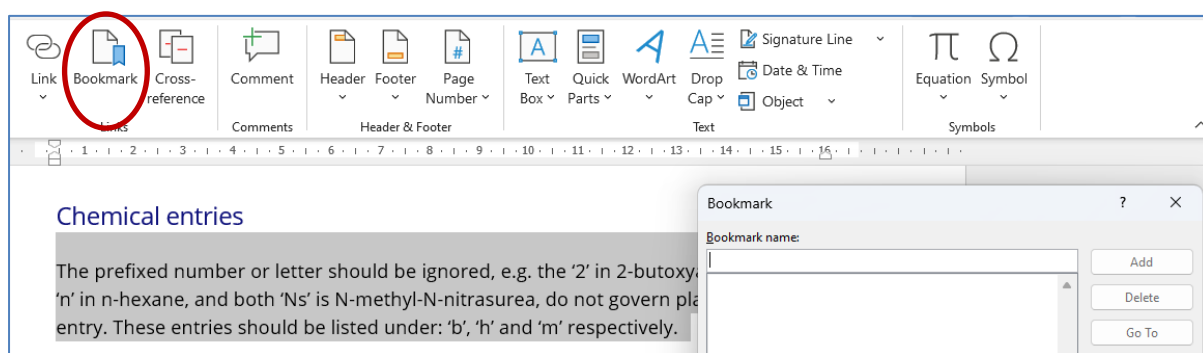
Indexing a whole section of text

The third option, along with “Cross-reference” and “Current page,” in the indexing

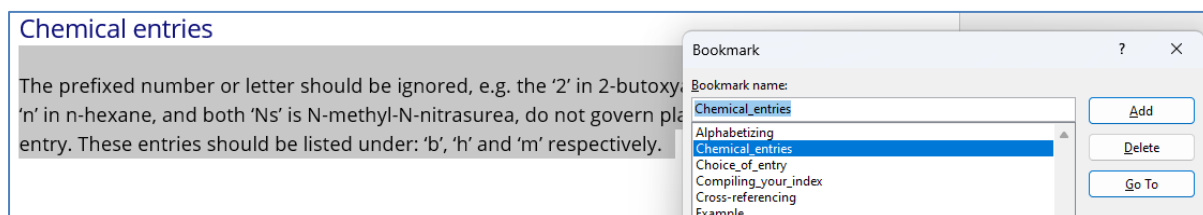
dialogue box is "Page range." This is the option that allows you to assign an index entry to a continuous block of text, be that a few sentences or multiple paragraphs, and whether or not it runs over multiple pages.

This process has one step in addition to the process for indexing a single word or a phrase: you have to begin by giving Word a name for the block of text that you want to index. You do this by creating a bookmark in Word.

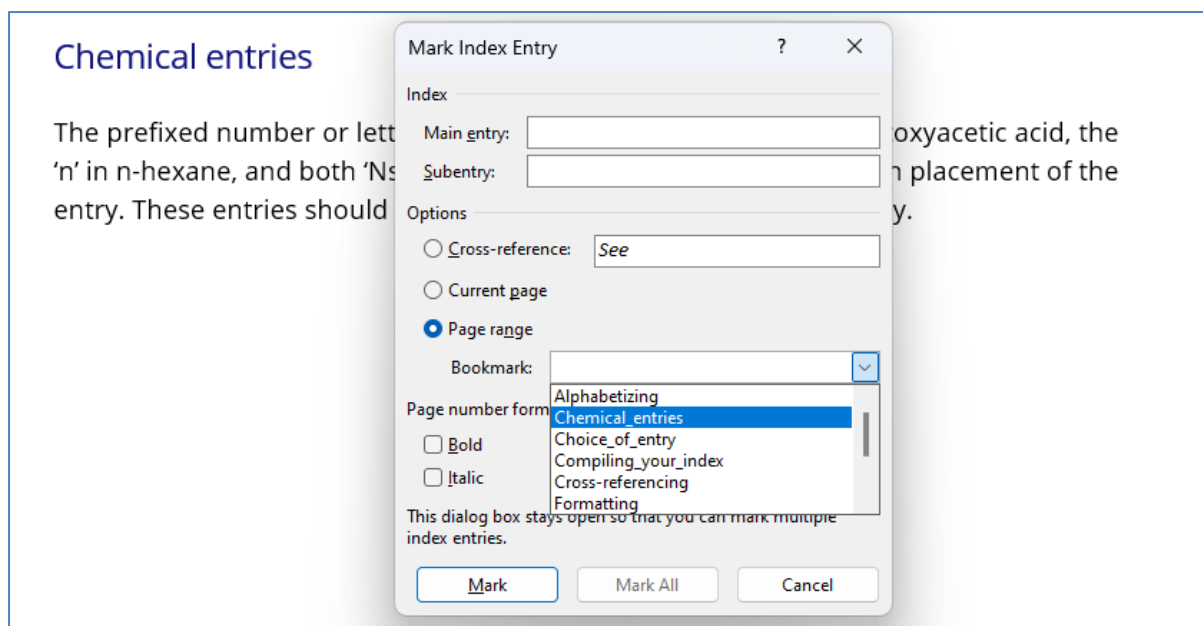
1. Select the range of text that you want to index.
2. From the "Insert" menu in Word, select "Bookmark." The following dialogue box will appear.



3. Type a one-word name for the bookmark in the top line and click "Add" to save it. Each separate block of text requires a new bookmark.

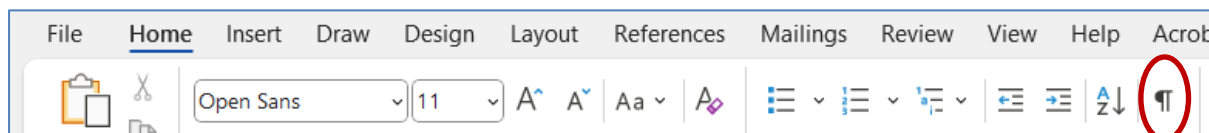


4. Place your cursor at the end of the bookmarked section.
5. Press ALT+SHIFT+X to open the indexing dialogue box, and do everything as you would for a standard entry (as in the previous section) including typing the headword, except:
6. Click on the "Page range" option and choose the name of the bookmark you've just created from the dropdown list immediately below.



Modifying index entries after you've typed them

Word holds index entries directly where they have been placed in the file, as hidden text. To view the entries, you will need to unhide the text by clicking the ¶ symbol on the “Home” toolbar in Word.

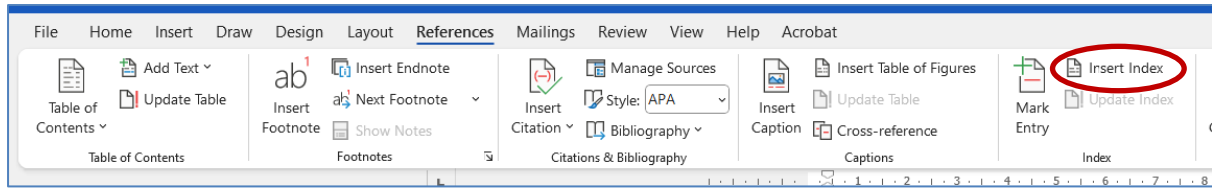


The index entries are in curly brackets, with the code XE at the beginning. A typical entry might look like this: {XE “indexing;in Word:advantages of”}. Here, “indexing” is the main entry, “in Word” is a subentry, and “advantages of” is a sub-subentry. You can edit this text to change the index term.

Reviewing your index list in Word

We encourage you to review your index regularly as you work through the indexing process. You can view how your index looks so far by following these steps:

1. Place your cursor at the end of the document **before any endnotes** inserted using Word’s automatic endnotes feature.
2. Choose “Index and Tables” from the “Reference” submenu of the “Insert” menu in Word / “Insert Index” in the “References” ribbon:



3. This creates an index in Word's standard layout. There is no need to engage with the options for changing the format of this index (alignment, spacing, etc.) as it will be taken care of during typesetting. **Please note:**

- Word automatically deletes duplicate page entries for the same heading.
- After you have created the index, you can continue to work on it. To update the index to take account of changes, place the cursor anywhere within the index and press the F9 key.
- The order in which Word sorts index entries does not account for the subtleties of alphabetization that have become standard in publishing. It's important to note that any rearrangements you make to this list will automatically be undone when the list is refreshed.

Editing your completed index

Once you have finished indexing, follow these steps to make edits to the list (if you have any):

- Generate the final index list following the steps outlined above.
- Copy the list and paste it into a new Word file.
- Switch on "track changes" and make any **text** edits necessary to bring the list up to your expectations

NOTE: Changes should be made to the text parts of the index only. Changes should not be made to the page numbers which are automatically generated. Any alterations to the page numbers will not be shown in the proof

1. Please note that indexes should be alphabetized in order of the key term, ignoring the preposition (i.e. *a, an, on, or, and the*).
2. Save the file and send that along with the main "tagged" Word file.

These corrections will be incorporated during the typesetting stage, which is also the stage when your index tags in the Word files will be coded directly into the typesetting files.

Indexing multiple separate chapter files

For Edited collections, or books with multiple chapters that have been worked on separately, there is no need to provide an overall "Index.docx" file unless you would like

to, as we can collate it into a single index on your behalf after submission.

What to include in the index

More information on compiling word choices for your index can be found [on our website](#).

In addition to the guidelines that follow, the section on indexing in the *Chicago Manual of Style* and the discussions about the author as indexer in Pat Booth's *Indexing: A Manual of Good Practice*, Nancy Mulvany's *Indexing Books*, and Beth Luey's *Handbook for Academic Authors* can be useful. You should also take time to review the indexes in books on topics similar to yours.

An index entry is composed of the main heading and page numbers, subheadings and page numbers, and cross references.

Main headings (use nouns or noun phrases, not adjectives)

- terms or concepts used throughout the book
- names of authors whose work is quoted or discussed at length
- names of people mentioned because of their importance in the text
- names of relevant countries, regions, and jurisdictions
- names of relevant organizations, political parties, and institutions

Subheadings

- aspects or explanations of terms, concepts, and actions
- subdivisions logically related to the main heading

Footnotes or endnotes should be indexed only when they contain substantive information that is not found in the text.

Tables and illustrations should be indexed separately only if they provide information in addition to what is contained in the text.

Cross references

- “see” references are used to assist the reader in finding a subject or name that may appear in the text in more than one form – i.e. Carroll, Lewis *see* Dodgson, Charles Lutwidge; NATO *see* North Atlantic Treaty Organization
- “see also” references are used to direct the reader to topics linked to the topic entry – i.e. bodies, falling *see also* motion; space; speed, time; velocity; weight; postcommunist countries *see also* countries by name

Entry treatment

- common nouns and noun phrases should be listed lowercase – i.e. economic theory; global warming; philosophy; technology
- proper nouns should be capitalized as they are in the text – i.e. Tocqueville, Alexis de; von Neumann, John



- use italics for titles of books, songs, ships, legal cases – i.e. *Rising Sun* (ship); *Alice in Wonderland*; *Brown v. Board of Education*

What not to include in the index

- Table of contents
- Preface
- Acknowledgments
- Chapter titles
- Bibliography / References
- Verbs or adjectives standing alone – i.e. peripheral; circular; global