

# Index Tools Professional

**Version 2.2 - November 2007**

**A shareware plug-in for FrameMaker**

**Silicon**  **Prairie Software**

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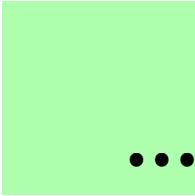
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# Introduction

Index Tools Professional is a FrameMaker plug-in that makes working with index entries in FrameMaker documents much easier. It also provides utilities that aid in formatting an index and allows you to easily produce a master index for a set of FrameMaker books.

## Requirements

To use the Index Tools Professional plug-in, you must be using FrameMaker version 6.0 or later. The plug-in is available for the following platforms:

- Windows
- Macintosh

## Installation

To install the Index Tools Professional plug-in, perform the steps for the platform you are using.

### Windows

Perform the following steps to install Index Tools for Windows:

- 1 Copy the appropriate version of the IndexToolsPro.dll into the \fminit\PlugIns directory that is located in the directory where FrameMaker is installed.**



*To install the plug-in, you will need to have file system permission to write to the PlugIns directory. For Windows XP and earlier, this means being logged into the system as a member of the Administrator or Power User groups. For Windows Vista with User Account Control (UAC) this means providing Administrator credentials when you copy the DLL file into the directory.*

- 2 Restart FrameMaker.**

## Macintosh

Perform the following steps to install Index Tools for the Macintosh:

- 1 **Copy the appropriate version of the IndexToolsPro file to the Modules folder. This folder is located in the folder where FrameMaker is installed.**
- 2 **Restart FrameMaker.**

## Removal

To remove Index Tools, close FrameMaker if it is running. Remove the files you added when you installed the plug-in, and then restart FrameMaker.

## Shareware notice

Index Tools Professional has been released as shareware. If you find the plug-in useful, please pay the shareware fee. The \$30 cost is minimal, given the capabilities that Index Tools Professional provides. Paying the shareware fee also encourages development of other tools like Index Tools Professional.

## Redistributing Index Tools Professional

Index Tools Professional is shareware. You may redistribute the Index Tools Professional package with the following restrictions:

- You may not alter the software.
- You must distribute the entire package.
- You may not charge a fee for redistributing Index Tools Professional.

## Problem reports and suggestions

If you find any problems with the Index Tools Professional plug-in, or if you have any suggestions for future enhancements, e-mail them to:

**[support@siliconprairiesoftware.com](mailto:support@siliconprairiesoftware.com)**





# Chapter 1

## Index Entries



FrameMaker provides powerful indexing capabilities. Typically, you use the Marker window to add index entries to FrameMaker documents. This approach to working with index entries has several disadvantages:

- The Marker window isn't resizable.
- You must carefully enter special commands to add features such as ranges and sorting to your index.
- Index markers are limited to 255 characters.
- It's easy to "lose" an Index marker. Markers can sit on top of one another, making it difficult to separate them. As you edit text, they can be deleted accidentally without any warning.
- Index entries aren't visible within the text, making them difficult to edit in the context of the material they are describing.
- The contents of markers isn't easily spell-checked.
- Index markers can't contain variables.
- Conditional index entries are difficult to manage.

Index Tools Professional solves these problems, providing tools to make FrameMaker's powerful indexing capabilities even better.



After you've added the index entries to your document, Index Tools Professional will use them as the source to create the Index markers in the document. You never need to use the Marker window to view or edit your index entries. The source for the Index markers remains in your documents, stored safely as conditional text.

## Format for index entries

Each index entry appears on a separate line in the FrameMaker document, and has the "Index Entry" paragraph format automatically applied to it. If the "Index Entry" paragraph format isn't available in the document, it will be automatically added. The new style will be based on the default style for the document, and appear as blue text. You can change any characteristics of this paragraph format, and each index entry you create will use those characteristics.

Each index entry is also automatically part of the "Index" condition. This allows the index entries to be shown and hidden using FrameMaker's conditional text feature. If the "Index" condition isn't part of your document, it will be added automatically.



*You may want to consider adding the Index Entry paragraph format and Index condition to the templates you regularly use.*

Special characters are used to indicate the start and end of each index entry.

- Each entry begins with the characters ".i."
- Each entry ends with a semicolon (;)

This formatting allows Index Tools Professional to know when an index entry starts and ends, as well as the type of index entry. This special formatting also allows other tools to locate and process the contents of index entries.

## Types of index entries

Index Tools Professional has built-in support for many of FrameMaker's standard types of index entries. The following table lists the types of index entries available:

Type	Description
Standard	This entry starts with the characters “i.” It's used for a standard single-page index entry. Most of the index entries you create will be this type.
Start Range	This entry starts with the characters “i(.” It's used to indicate the start of a page range.
End Range	This entry starts with the characters “i)”. It's used to indicate the end of a page range.
No Page	This entry starts with the characters “i#.” It's used for index entries for which the page number is suppressed.
Native	This entry starts with the characters “i*.” It's used for entries that need to contain native FrameMaker index formatting, such as an alternative sorting order.
Conditional	This entry starts with the characters “i[ <i>condition</i> ].” It's used for entries that are to be included in the index only when the specified condition is displayed.

## Inserting index entries

To insert an index entry into a document, perform the following steps:

**1 Place the insertion point in the document where you want the entry.**

The section “Where to place index entries” on page 8 provides guidelines that describe where to place index entries in your documents.

**2 Choose the type of entry to insert.**

In the Indexing menu, point to Insert Index Entry and select the type of entry you want to insert. A blank entry of the specified type will be inserted. The following shortcuts are available when inserting index entries:

Index entry type	Keyboard shortcut
Standard	Esc i i
Start Range	Esc i s
End Range	Esc i e
No Page	Esc i n
Native	Esc i x
Conditional	Esc i c



*You can right-click (Windows) or Control-click (Macintosh) to display the Text pop-up menu. This menu contains the commands to insert the various types of index entries.*

**3 Type the index entry text.**

The insertion point will be positioned to allow you to type the contents of the index entry. Use the standard FrameMaker format for index entries, with colons separating the levels in the entry.

After you insert an index entry, the insertion point will be positioned to allow you to type the entry.

```
displayed on a color monitor or printed on a commercial
printing press.
:
: We describe color in terms of three characteristics—
: hue, value, and saturation. Hue is the wavelength of
: light reflected from or transmitted through an object.
```

## Showing and hiding index entries

You can show and hide the index entries in a document by choosing Show/Hide Index Entries from the Indexing menu. The state of the “Index” condition will be toggled, showing or hiding the index entries. You can also hide or show index entries by directly controlling the state of the “Index” condition.

The following shortcut is available to toggle the state of index entries:

Item	Keyboard shortcut
Show/Hide Index Entries	Esc i t

Because the index entries are additional paragraphs in the document, they do affect the pagination when they are displayed. Before you print the final version of your document or book, be sure the “Index” condition is set so that it isn’t being shown.

You can also show or hide all of the index entries for an entire book. With the book as the active document, choose Show All Index Entries or Hide All Index Entries from the Indexing menu.

## Where to place index entries

You can place index entries in any flow in a FrameMaker document, and within any table in a document.

### Within text flows

Within a text flow, the best location for an index entry immediately after the paragraph the entry refers to. Another common location is immediately after a heading for a section the index entries refer to.


When you insert an index entry into a text flow of FrameMaker document, by default the entry is placed immediately before the paragraph that contains the insertion point. It doesn’t matter where the insertion point is in the paragraph, the new index entry appears immediately before the paragraph.

You can control the placement of index entries with the IndexEntryLocation configuration setting. Refer to “IndexEntryLocation” on page 46 for more information.

## Within tables

In a table cell, index entries should be placed immediately before the paragraph to which they refer. This allows the index entries in the table cells to be hidden properly when the “Index” condition is not being shown.

Within table cells, index entries appear before the text in the cell.

Natural Resources			
Activity	Description	Equipment	Restrictions
	<a href="#">i.swimming.</a> Nothing compares to the pleasure of a brisk swim in Spirit Lake. Although fed by mountain streams, the lake is surprisingly comfortable in the summer.	Towel service and massage year-round.	Children under 14 are not allowed in the sauna, jacuzzi, or hot-tub.

## Inserting and deleting index markers

Once you have added index entries to a FrameMaker document, you need to create the Index markers that FrameMaker will use when you generate the index.

### Inserting all markers

To insert the Index markers based on the index entries in the document, point to Index Markers in the Indexing menu and choose Insert All Markers. Index Tools Professional will delete any existing index markers from the document, and then use the contents of the index entries to create new Index markers.

#### Bitmap image and output resolution ¶

[i.Resolution,¶](#)  
[i.Output resolution,¶](#)  
[i.Bitmap image:resolution of,¶](#)

Resolution is the number of dots available to represent graphic detail in a given area: on a computer:

When you insert Index markers, the Index markers are created based on the index entries in the document.

Within text flows, index markers are inserted at the end of the paragraph located immediately before the index entries. In tables, index markers are inserted at the end of the paragraph located after the index entries. Inserting the Index markers in these locations allows you to easily find them. It also allows them to inherit any conditional text settings that are applied to the paragraph the index entries apply to.

If you want index markers to appear at the beginning of paragraphs, rather than the end, you can use the MarkerLocation configuration setting described on page 46 to do so. This can be useful if your documents contain long paragraphs that extend onto more than one page.



*FrameMaker markers have a limit of 255 characters. If the entries for an Index marker exceed 255 characters, Index Tools Professional will automatically create additional Index markers. You can control the length with the MaximumMarkerLength configuration setting.*

In rare cases, you may have created an index entry that doesn't have valid formatting, such as not having a valid ".i." character sequence at the beginning. If an invalid index entry is found while inserting Index markers, an error message will be displayed indicating the problem. The insertion point will be placed in the invalid entry, allowing you to correct the entry.

## **Deleting all markers**

To delete all Index markers from a document, point to Index Markers in the Indexing menu and choose Delete All Markers. All of the Index markers for the current document will be deleted. Some users find it useful to delete any existing Index markers to reduce clutter as they are indexing a document.

## **Inserting one marker**

If you are editing the index entries in a document, you may need to change only one or two entries. After you've made your changes to the index entry, place the insertion point anywhere within the block of index entries. Point to Index Markers in the Indexing menu and choose Insert One Marker. Any existing Index markers that correspond to block of entries will be deleted, and new Index markers will be created based on the content of the index entries.

## **Deleting one marker**

If you are editing the index entries in a document, you may want to delete an index entry. To do this, you need to remove the Index markers as well as the corresponding index entries. To remove the Index markers, place the insertion point anywhere in the paragraph that contains the Index markers you want to delete. Point to Index Markers in the Indexing menu and choose Delete One Marker. The Index markers in that paragraph will be deleted.





When Index markers are created based on the index entries, the conditions in the current document are examined. If the condition specified in the conditional index entry is displayed, or all conditions are displayed, the index entry will be converted to an Index marker. Otherwise, the conditional index entry will be skipped, as if it didn't exist in the document.

By default, conditional index entries are standard entries. To make other types of index entries conditional, just insert a conditional entry. Then manually add the special character after the condition bracket to indicate the entry type. For example, the following is a conditional No Page entry. The pound symbol (#) was manually added after the [Teacher] condition indicator.

`.i[Teacher]#.answers: see key;`

## Ranges

Inserting ranges for an index is easy with Index Tools Professional. Simply use the Start Range and End Range index entries to indicate the beginning and end of the range. Index Tools Professional will automatically include the appropriate tags in the Index markers. The Start Range and End Range index entries can be mixed in with the other types of index entries.

## Using variables

When you use Index Tools Professional to manage your index entries, you can easily use variables in them. Simply insert the variable within the index entry text. When Index Tools Professional converts the index entry into an Index marker, it copies the text of the variable and uses it in the Index marker.

When you update or change the variables in your FrameMaker documents, you will need to re-insert the Index markers to have them reflect the change. The easiest way to do this is to make the book active and choose Update All Markers from the Indexing menu.



*Be sure you regenerate your index after updating variables. The changes to the variables may impact how index entries are sorted.*

## Using “see” and “see also” entries

Index entries that contain the words “see” or “see also” are treated specially by Index Tools Professional. These entries automatically appear with the <Italic> character format applied to them to help them stand out.

The “see also” entries, which are typically used as subentries, are also automatically re-alphabetized so that they appear at the top of the list of subentries. The following entries show how “see” and “see also” entries are automatically formatted:

```
fruit
  see also vegetables
  apples 15
  nectarines, see peaches
```



## Text insets

If you use text insets in your FrameMaker documents, you need to be aware of how Index Tools Professional handles them. When you create a text inset, you're effectively making a copy of another FrameMaker document and inserting it into the current document. All aspects of the text inset are imported, including any Index markers and index entries. The contents of the text inset is locked, preventing you from directly editing the inset.

When Index Tools Professional inserts Index markers into a document, it "unlocks" the text insets in the current document. Effectively, the document becomes one single document, as if no text insets were used. Any Index markers created within a text inset are created only in the document that uses the inset. The original text inset document is not altered in any way.

To effectively use index entries in text insets, keep the following guidelines in mind:

- If a text inset will have index entries contained in it, always open the text inset document and insert the index entries into the inset. This ensures that the documents that use the text inset will always contain the proper index entries.
- After you have inserted index entries into a text inset document, be sure to perform the Insert All Markers operation to create the Index markers in the text inset document. This ensures that when the text inset is updated, it will contain the appropriate Index markers.
- If you perform an "expand" operation to expand existing index entries for a FrameMaker document that contains text insets, be sure to also perform the "expand" operation on each text inset used in the document.

## Indexing single-source files

If you're using Index Tools Professional with a set of files that will be used to produce multiple outputs, keep the following in mind.

### Conditional entries

Use Conditional index entries for index entries that should be included in the final index only when a specific condition is displayed. All other types of index entries will be included in the resulting documentation.

### Variables

Use variables for things like product names in your index entries. Variables can easily be changed for each form of output. Index Tools Professional allows you to use variables in index entries, just as you would use them in any other text.

## Final output procedure

When producing the final output for single-source files, use the following procedure for each output.

### 1 Set the conditions for all the documents in the book.

When you've set which conditions are displayed and which are hidden, be sure that you've unmarked the option to display all conditions.

### 2 Set the variables for all the documents in the book.

Update the variables in the book that are specific to the output you are producing.

### 3 Choose to Update All Markers.

With the book active, choose Update All Markers from the Indexing menu. This will insert the Index markers based on the index entries in each file. The only conditional index entries that will be included will be those for which the corresponding condition is being displayed.

### 4 Perform the generate/update operation.

The index will be generated, based on the Index markers that were just updated for each of the documents.

### 5 Produce the final output.

Produce the final output, such as print documents, PDFs, and so on.

## Translating indexes

Often, FrameMaker documents are translated into other languages. If you will be having your documents translated and are using Index Tools Professional to manage index entries, keep the following suggestions in mind:

- Some translation vendors prefer to transfer the Index markers directly, rather than the index entries that are managed by Index Tools Professional. For this situation, be sure that the Index markers are up to date, and that the Index condition is hidden when you send the Frame files to translation.
- If you expect that the content of the Index markers will expand significantly, use the MaximumMarkerLength configuration setting to allow for expansion of the Index marker text.
- Some translation vendors prefer to have only one index entry in each Index marker for a Frame document. For this situation, use the SingleEntryMarkers configuration setting to ensure that each Index marker contains only one index entry.

- If your translation vendor will be translating the index entry text, be sure the Index condition is displayed when you send the Frame files to translation. You might also want to remove all Index markers from your documents, so the translation vendor won't accidentally translate those as well.



## 5 Check the index entries.

Index Tools Professional will create index entries in the most appropriate locations in your document, based on where the Index markers were found. You may want to check the index entries that were created to verify their formatting and that they appear the appropriate location.

## 6 Re-insert the Index markers.

From the Indexing menu, point to Index Markers and choose Insert All Markers. The Index markers for the document will be re-created, based on the index entries in the document.

## 7 Perform the expand operation on any text insets.

If your document uses text insets that contain Index markers, you need to open the text inset documents and perform the expand operation on each inset individually. Refer to “Text insets” on page 14 for more information about using index entries in text insets.

# Conversion guidelines

When converting existing FrameMaker documents for use with Index Tools Professional, keep the following guidelines in mind:

- Always make a backup before you begin the conversion process. You are altering your documents, and don't want to lose any index data.
- Consider generating an index before performing the conversion. You can use this index for comparison after you have converted all of the documents in the book.
- If you have used any special formatting for your index entries, be sure to verify that the appropriate type of index marker is used in the document. For example, if you have used special formatting, be sure that the Native index entry is used.
- After you have re-inserted the Index markers in the document, generate an index to verify the results. Use the document compare feature in FrameMaker to compare the index generated before the conversion with the index generated using Index Tools Professional.





## Chapter 3 Merge Index



The Merge Index utility is useful for reducing the size of indexes. This chapter is divided into the following sections:

- The “merge” process
- Well-formed indexes
- Using Merge Index

### The “merge” process

The “merge” process works by collapsing an index entry that use two lines, but could use only a single line. For example, the following index entry uses two lines:

```
indexes
  described 25
```

The index entry could appear on a single line:

```
indexes, described 25
```

The merge process is intelligent. It merges only those entries that are candidates to appear on a single line. For large indexes, the merging process can save several pages.

The merge process is also helpful if you will be creating a multi-book index. In a multi-book index, you want the corresponding entries from the various books to combine. To do this, you should use a colon (:) to separate the levels when you create FrameMaker index markers. However, the individual entries in each book may take two lines when they could use only one.

For example, the following entries from the User’s Guide (UG) and the Getting Started (GS) manual will combine in the multi-book index:

- indexes
  - described GS 25
  - editing UG 41

However, in each individual book, they won’t combine. Merging will cause them to take up only one line in the index, reducing the size of the index.

## Well-formed indexes

For the merge process to work best, the index should be “well-formed.” This means that the levels used for the index entries are consistent and applied uniformly. For example, the following index entries are well-formed:

- index tools
  - automated 36
  - manual
    - index cards 37
    - machine aided 38
  - using 52
- indexes
  - described 25
  - examples 31
  - types of 41
- indexing
  - profession 51

Notice that the levels are used consistently. The “heading” entries, such as ‘indexes’ and ‘index tools’ don’t have page numbers. An index formatted this way works well with the merge process.

Note the last index entry. It uses two lines, but could use only one. The merge process would combine this entry into the following:

- indexing, profession 51

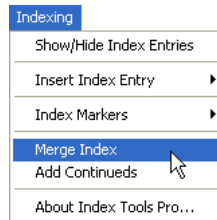
The following entry is not well-formed, but is common in indexes:

- indexing 25
- profession 51

Index Tools will properly handle this type of entry, not merging the two entries. Even though Index Tools can properly deal with this type of entry, it is desirable to remove them from your indexes.

## Using Merge Index

To merge an index, generate the index as you normally would. With the index document active, choose Merge Index from the Indexing menu.



When you run the merge process, Index Tools examines the paragraph styles in the currently-active FrameMaker document. If it finds the appropriate paragraph styles, the process will continue. This prevents the merge process from being run on non-index documents.



*You can have the merge process performed automatically after performing a generate/update operation for a book. Refer to the configuration setting "ProcessIndex" on page 47 for more information.*





# Chapter 4

## Add Continueds



The Add Continueds utility automatically adds “continued” lines to groups of index entries that span more than one column. This chapter is divided into the following sections:

- Index requirements
- Using Add Continueds
- Continued Line Styles

### Index requirements

For the Add Continues utility to work properly with an index, the index must conform to some basic guidelines.

#### Index levels

The Add Continueds utility supports indexes that have entries a maximum of three levels deep. If your index has entries at level four or deeper, it may have usability problems you need to address.

#### Balanced columns

To have the continued lines appear properly, you **cannot** use balanced columns in your index. If you have balanced columns, Index Tools Professional won’t be able to properly specify where columns in the index begin and end.

#### Index paragraph styles

The index must use FrameMaker’s default paragraph styles for paragraphs in the index, or you must specify a custom set of paragraph styles to use. The following table lists the default paragraph styles that the US English version of FrameMaker uses for indexes.

Paragraph style	Description
GroupTitlesIX	Used for group titles
Level1IX	Used for level 1 entries
Level2IX	Used for level 2 entries
Level3IX	Used for level 3 entries

If your index doesn't use these default paragraph styles, you must create a FrameMaker document named IXStyle.fm, which contains a custom list of the styles your index uses.

## IXStyle.fm

If your FrameMaker index files don't use the default paragraph styles for indexes, you can define the styles to use by creating the IXStyle.fm document.

To create this document, perform the following steps:

- 1 Create a new FrameMaker document based on the standard Portrait template.**
- 2 In the first four paragraphs of the document, enter the names of the paragraph styles that are used for the index. Be sure the entries appear in the following order:**
  - Group Titles style
  - Level 1 Index style
  - Level 2 Index style
  - Level 3 Index style

For example, you would add the following entries to the IXStyle.fm file if you were using the German version of FrameMaker:

- GruppentitelSIX
- Ebene1SIX
- Ebene2SIX
- Ebene3SIX

The entries are case-sensitive, so be sure to enter them exactly as they appear in the index document.



Select a format and click OK. If you chose Custom, another dialog will be displayed that allows you to enter the “continued” line you want to use. The Add Continueds utility will insert “continued” lines for all groups of index entries that span more than one column.



*You can have the add continueds process performed automatically after performing a generate/update operation for a book. Refer to the configuration setting “ProcessIndex” on page 47 for more information. Appendix C also describes configuration settings that automatically specify the type of index continuation and the continuation text or formatting you want to use.*

## Continued Line Styles

New text lines are added to the index document when you choose to add continuations. You may want these additional lines to use a different paragraph style than the original line on which the continuation is based. For example, if you were converting the generated index to an online format, you may want to have the online conversion process delete these additional continued lines so they don’t appear in the online output.

If Index Tools Professional finds paragraph styles defined that have the exact name of the index styles and also include the “Cont” prefix in the name, these paragraph styles will be used for the continued lines. The following table lists the paragraph styles that would be used for continued lines for a default US English index.

Paragraph style	Description
ContLevel1IX	Used for level 1 continuations
ContLevel2IX	Used for level 2 continuations
ContLevel3IX	Used for level 3 continuations



*If these paragraph styles do not exist in the document, the standard index paragraph styles will be used for the continued lines.*





## Chapter 5 Master Index

•••••

A master index is a single index that contains all of the index entries for an entire series of books. The index included with a set of paper encyclopedias is a common example of a master index. FrameMaker has built-in capability to generate master indexes. Index Tools Professional makes the process of creating a master index very easy.

This chapter is divided into the following sections:

- Master index book
- Creating a master index for FrameMaker 6 and later
- Formatting a master index
- Limits
- Making a master index PDF

### Master index book

To create a master index, you must create a single book that contains all of the files that make up the books in the set. Each file in the book must be specially configured to have its page numbering appear properly, and to specify the prefix to use to identify the book the file is part of. Creating the master index book by hand is a tedious process. Index Tools Professional provides a routine that automates this process and makes it very easy.

With FrameMaker 6.0 and later, the more complex “volume number” and “chapter number” attributes were introduced. If you used the page prefix in your FrameMaker 5.5x documents, FrameMaker 6 and later automatically converts them to use the “chapter number” attribute. This means the best way to specify the prefix used in the master index is to use the “volume number” attribute.

Unfortunately, it's not that simple. Specifying a volume number prefix for a book component doesn't affect just the master book. Any time an update operation is performed on the book, the numbering characteristics specified for each book component are written to the individual FrameMaker files. In effect, the update changes the numbering characteristics of each file. You may inadvertently change numbering in a FrameMaker file just by performing an update operation on a book.

To help minimize this problem, FrameMaker warns you of inconsistencies between the numbering scheme specified by a book component and the actual FrameMaker file. However, with volume, chapter, page, paragraph, footnote and table footnote numbering properties, the potential for consistency problems is large. Unless you very carefully set up your FrameMaker books, you will receive numbering consistency messages virtually every time you perform an update operation on a book.

This documentation contains a procedure that describes how to use the Index Tools Professional plug-in to create a master index book that avoids numbering problems and inconsistency messages.

## Creating a master index for FrameMaker 6 and later

To create a master index using FrameMaker 6 and later, complete the following steps:

### 1 Set the numbering for each book that will be part of the set.

If you use any special numbering schemes in your individual FrameMaker books, be sure that the numbering for all of the files and book components is set up properly to give the numbering results you desire.

Pay special attention to the first FrameMaker file in each book. Be sure it is set to **restart** the paragraph numbering and other numbering you have set up. This is easy to overlook, because if there is no previous component in the book, FrameMaker restarts the numbering by default.



*If you don't set the first component in each book to restart numbering, you will get incorrect results in your master index book.*

### 2 Perform an "update" operation on each individual book.

Be sure that numbering is updated when you perform the operation. Performing this update ensures that the numbering settings for each FrameMaker file will be consistent with the numbering settings for the corresponding book component.

### 3 Open all of the books that will be part of the master index.

### 4 Decide the prefixes that will be used to identify each book in the set.

For example, the prefix "QS" could be used to identify the Quick Start manual.



The final result is that the individual books, the master index book, and the individual FrameMaker files will have consistent numbering. This should greatly reduce, if not eliminate any numbering inconsistency warnings when you perform update operations on the individual books.

## Formatting a master index

When creating a master index, you will typically need to create a master index template based on the index template you use for the other books in the set. There are some common modifications for this master index template.

### Volume numbers

When using FrameMaker 6 or later to generate the master index, you must make a modification to the reference page of the master index template to have the volume numbers appear in the master index.

To have the volume numbering appear in the master index book, perform the following steps:

- 1 Open the index document for the master index book.**
- 2 Display the Reference pages for the index document.**
- 3 Scroll to the IX reference page.**

This page contains information that specifies how the index entries are generated.

- 4 Locate the following line:**

```
<$pagenum>
```

This line specifies the page number format for each index entry.

- 5 Include the <\$volnum> building block.**

```
<$volnum><$pagenum>
```

This line specifies that each index entry should include the volume numbering as well as the page number.



*If you use chapter numbering the <\$chapnum> building block may appear as well.*

- 6 Save the index document.**

Save the changes you make to the index document. You will use this document to produce the final output for your master index.



However, most sets of FrameMaker books aren't organized this way. Often, each book and its associated files are stored in a separate folder or directory. If used, referenced graphics are typically stored in yet another folder. The task of producing PDFs from these separate books, with working links, all in one location, with a master index can be difficult. Fortunately, FrameMaker's robust book feature makes it possible.

## Creating and organizing book files

There are three key techniques necessary to produce a set of PDFs with the desired characteristics:

- The PDF you produce for a book must have the same name as the book file. For example, if a book file is named "Book A.book", the resulting PDF must be named "Book A.pdf".
- The book files used to generate the PDFs for the set must all be in the same folder or directory location.
- You never need to move book files or individual Frame files when setting up the book organization to generate PDFs. Instead, use the Save As command to make a new copy of a book in the desired location.

If the book files for the set of PDFs you are creating aren't located in a single folder or directory, you must open each book, and use the Save As command to save a new copy of the book into a separate "working" folder. This location will store the books you will use to build your master set of PDFs.

When you perform the Save As command on each book, give the book the same name it has in its current location. Also notice that the paths to the files in the new book will become relative paths.

## The master index book

The master index book you use to generate the master index PDF requires special attention. Like the other books in the set, its book file must be in the same location as the other book files for the set.

It is essential that the master index book that you are using to create the master index PDF **not** contain the files from the other books in the set. It should contain only the generated master index that you made previously, and perhaps some additional files like a title page or introduction.

*If the master index book you use to create the master index PDF contains the files from the other books in the set, the hypertext links in the master index **will not work**.*











## Chapter 6 Troubleshooting

If you are having difficulty with Index Tools Professional, use the following information to help resolve the issues.

### The index entries don't appear in blue

Check the definitions of the Index Entry paragraph style and the Index condition. Both should have Blue (or whatever other color you chose) as the color. If only the Index condition has a color specified, be sure condition indicators are being displayed.

### The generated index doesn't contain any index entries

Be sure that you have inserted all Index markers in your Frame documents before generating the index. For individual Frame documents, use the Insert All Markers command. For entire books, use the Update All Markers command.

### The "see" and "see also" entries aren't in italics

Be sure that you have the <Italic> character format defined in your index document. Also, be sure that the font angle for the <Italic> character format is either "italic" or "oblique". Often, Frame index documents have the <Italic> character format defined, but the font angle isn't set properly.

### The "see also" entries aren't sorting properly

If you're using a configuration file, be sure the SeeAlsoSort setting is defined properly.

## The “see” and “see also” entries are not capitalized

If you want the “see” and “see also” entries to begin with a capital letter, you will need to use a configuration file with the appropriate settings. The following is a portion of the SPConfig.fm file that will produce the desired results.

Setting	Value
SeeReference	See
SeeEntry	<Italic>See<Default Para Font>
SeeAlsoReference	See also
SeeAlsoEntry	<Italic>See also<Default Para Font>

## The index entries aren’t properly formed

If index entries aren’t formed properly, such as having improper line breaks, check all of the native entries you have defined. Be sure you are following all of the indexing rules defined in the FrameMaker documentation. Failing to follow these rules for native index entries will result in improperly formed index entries.

A common improper native entry occurs when an alternate sort sequence is used, but doesn’t appear as the last item in the index entry. This results in an entry that is improperly split into two separate entries in the generated index.

## The hypertext links don’t work in the master index

Be sure that you’ve carefully followed the procedure described in this documentation when creating a PDF for a master index. Check the following:

- Be sure you were generating Acrobat data when making the PostScript for the PDFs.
- Be sure all books in the set are open when you generate PostScript.
- Be sure the master index book *does not* contain the files from the other books in the set. If it does, the hypertext links will not be generated properly.

# Appendix A

## Command Reference



Keyboard shortcuts have been defined for most operations in Index Tools Professional. If you want to create additional keyboard shortcuts, or you don't like the existing keyboard shortcuts and want to redefine your own, this appendix contains a list of the names for each command.

### Command reference

The following commands insert and show index entries are defined in Index Tools Professional:

Command	Description
ShowHideIndexEntries	Show or Hide Index Entries
InsertIdxEntry	Insert a Standard index entry
InsertStartEntry	Insert a Start Range index entry
InsertEndEntry	Insert an End Range index entry
InsertNoPage	Insert a No Page index entry
InsertNative	Insert a Native index entry
InsertConditional	Insert a Conditional index entry

The following commands to insert, delete and expand Index markers are defined in Index Tools Professional:

Command	Description
InsertAllMarkers	Inserts all Index markers in a document

Command	Description
InsertOneMarker	Inserts one Index marker in a document
DeleteAllIndexMarkers	Deletes all Index markers from a document
DeleteParagraphIndexMarkers	Deletes the Index markers from the current paragraph
ExpandIndexMarkers	Expands the existing Index markers in a document

The following commands to format indexes are defined in Index Tools Professional:

Command	Description
IXPMergeIndex	Performs a merge operation on an index
IXPAddContinueds	Inserts continuation lines into an index

The following book-level commands are defined in Index Tools Professional:

Command	Description
UpdateAllMarkers	Updates all Index markers in a book
BuildCompIndex	Builds a master index book
ShowIndexEntriesBook	Shows all index entries for a book
HideIndexEntriesBook	Hides all index entries for a book

The following miscellaneous command is defined in Index Tools Professional

Command	Description
IndexToolsProAbout	Displays the About dialog

## Modifying a shortcut

You can use a FrameMaker customization file to add or modify a shortcut for any of the commands in Index Tools Professional. For example, the following lines from the “Customui.cfg” file specify that the F1 key will toggle showing and hiding index entries, and that Shift+F1 will insert all Index markers. Notice the command values came from the tables in the previous section.

```
<Command ShowHideIndexEntries  
  <Label ShowHideIndexEntries>  
  <KeySequence /F1>  
  <Definition \x1000>>  
<Command InsertAllMarkers  
  <Label InsertAllMarkers>  
  <KeySequence +/F1>  
  <Definition \x1001>>
```

Refer to the Customizing FrameMaker online manual for more information about creating and using a customization file to add or change FrameMaker shortcuts.





## **Appendix B**

# **Indexing References**

If you want to learn more about indexing, the following books provide useful information about the subject.

**The Art of Indexing**

**By Larry S. Bonura**

**John Wiley and Sons, Inc.**

**Published March 1994**

**ISBN: 0471014494**

**The Chicago Manual of Style, 15th Edition**

**University of Chicago Press**

**Published August 2003**

**ISBN: 0226104036**











## IndexEntryLocation

This setting specifies the placement of index entries that are added by Index Tools Professional. By default, new index entries are placed before the paragraph that contains the insertion point. You can use the IndexEntryLocation setting to force new index entries to be placed before or after paragraph that contains the insertion point. The value 1 specifies that index entries will be placed before the current paragraph. The value 2 specifies that index entries will be placed after the current paragraph.

In the following example, new index entries will be inserted after the paragraph that contains the insertion point.

Setting	Value
IndexEntryLocation	2

Index entries made in tables will always appear before the current paragraph.

## MarkerLocation

This setting specifies the placement of Index markers that are inserted by Index Tools Professional. By default, Index markers will be placed at the end of the paragraph that precedes the index entry. You can use the MarkerLocation setting to force the Index markers to be placed at the beginning of the paragraph. This can be useful if you have long paragraphs in your documents that flow onto an additional page. The value 1 specifies that Index markers will appear at the beginning of the paragraph, while the value 2 specifies that they will appear at the end of the paragraph.

In the following example, the Index markers will appear at the beginning of each paragraph.

Setting	Value
MarkerLocation	1

## MarkerParagraph

This setting specifies the placement of Index markers that are inserted by Index Tools Professional. By default, Index markers will be placed at the end of the paragraph that precedes the index entry. You can use the MarkerParagraph setting to force the Index markers to be placed in the paragraph immediately following the index entries. The value 1 specifies that Index markers will be placed in the paragraph that precedes the index entries, while the value 2 specifies that they will be placed in the paragraph that follows the index entries.

In the following example, the Index markers will be placed in the paragraph that follows the index entries.

Setting	Value
MarkerParagraph	2

## MaximumMarkerLength

This setting specifies the maximum number of characters that can Index Tools Professional will add to a single Index marker. By default, up to 255 characters can be added. In some cases, such as translation, it is desirable to have fewer characters in each Index marker to allow room for expansion. The MaximumMarkerLength setting allows you to control the maximum length of each Index marker.

In the following example, the each Index marker will have a maximum length of 100 characters.

Setting	Value
MaximumMarkerLength	100

## ProcessIndex

This setting specifies whether the “merge” and “add continueds” operations are applied to an index after a generate/update operation is performed on a FrameMaker book. By default, Index Tools Professional won’t apply any formatting to a generated index. If you include the ProcessIndex setting, Index Tools Professional will attempt to format the generated index. The value True indicates the index will be formatted automatically, with both the “merge” and “add continueds” processes being run. The value False indicate no processing will be performed.

If the value is set to MergeOnly, only the “merge” process will be performed. If the value is set to ContinuedLinesOnly, only the “add continueds” process will be performed.

In the following example, the ProcessIndex setting indicates any index will be formatted after it is generated. Both the “merge” and “add continueds” processes will be performed.

Setting	Value
ProcessIndex	True

## SeeAlsoEntry

This setting specifies the text that is added to an index marker when a “see also” is found in an index entry. The text added to the index marker typically contains the “see also” text, as well as any formatting that is to be applied to the “see also” text. The following is the default text that is added to index markers for “see also” entries:

**<Italic>see also<Default Para Font>**

Notice that the “Italic” character format is applied, and that the words “see also” appear in the text. If you want to change either the formatting or the actual “see also” text, you can use the SeeAlsoEntry setting.

In the following example, the SeeAlsoEntry setting is used to specify a new “see also” string that uses the Emphasis setting for the “see also” text:

Setting	Value
SeeAlsoEntry	<Emphasis>see also<Default Para Font>

## SeeAlsoReference

This setting specifies the text that Index Tools Professional will search for when it examines index entries for “see also” references. By default, the text “see also” is searched for in each index entry. If it is found, the appropriate “see also” formatting is applied. If you want to search for different text, such as a foreign language, you can use the SeeAlsoReference setting.

In the following example, the SeeAlsoReference setting is used to specify that the phrase “refer to” be used as the “see also” text that Index Tools Professional will search for in index entries:

Setting	Value
SeeAlsoReference	refer to

## SeeAlsoSort

This setting specifies the sorting string that is added to an index marker when a “see also” is found in an index entry. By default, the sorting string “:aaa” is added to the index marker for “see also” entries. This causes the entry to appear at the top of the list of subentries. If you want to change the sorting order for the “see also” entries, you can use the SeeAlsoSort setting.

In the following example, the SeeAlsoSort setting is used to specify a new sorting order for “see also” entries. Specifying “:zzz” as the sort string will cause the “see also” entries to appear at the end of any group of subentries:

Setting	Value
SeeAlsoSort	:zzz



*Be sure the value of the SeeAlsoSort setting begins with a colon.*

## SeeEntry

This setting specifies the text that is added to an index marker when a “see” is found in an index entry. The text added to the index marker typically contains the “see” text, as well as any formatting that is to be applied to the “see” text. The following is the default text added to index markers for “see” entries:

**<Italic>see<Default Para Font>**

Notice that the “Italic” character format is applied, and that the word “see” appears in the text. If you want to change either the formatting or the actual “see” text, you can use the SeeEntry setting.

In the following example, the SeeEntry setting is used to specify a new “see” string that uses the Emphasis setting for the “see” text:

Setting	Value
SeeEntry	<Emphasis>see<Default Para Font>

## SeeReference

This setting specifies the text that Index Tools Professional will search for when it examines index entries for “see” references. By default, the text “see ” is searched for in each index entry. Notice the space following the word “see”. If it is found, the appropriate “see” formatting is applied. If you want to search for different text, such as a foreign language, use the SeeReference setting.

In the following example, the SeeReference setting is used to specify that the phrase “refer to” be used as the “see” text that Index Tools Professional will search for in index entries:

Setting	Value
SeeReference	refer to



*If the text you are searching for is a single word, be sure to include a space after it when you set the value in the SPConfig.fm file. The space following the word will ensure that only whole words will be found and that portions of words will be ignored.*

## SingleEntryMarkers

This setting specifies whether each index entry will be placed in its own Index marker. By default, Index Tools Professional will add as many index entries to an Index marker as will fit, subject to the 255 character limit or the MaximumMarkerLength setting. When translating Index markers, some translation services prefer to have only one index entry in each Index marker. The value True specifies that each Index marker will contain only one index entry.

In the following example, the SingleEntryMarkers setting specifies that each Index marker will contain only one index entry.

Setting	Value
SingleEntryMarkers	True



# Appendix D

## Scripting Support



Index Tools Professional can be controlled with standard FrameMaker scripting tools, including the Frame Developer's Kit (FDK) and FrameScript.

### Scriptable commands

The following commands can be accessed through scripting for both FrameScript and the FDK:

Command	Description
IndexToolsProAbout	Displays the About dialog.
IXPMergeIndex	Merges the entries in a generated index.
IXPAddContinueds	Adds continued lines to a generated index.
InsertIdxEntry	Inserts a standard index entry.
InsertStartEntry	Inserts a start range index entry.
InsertEndEntry	Inserts an end range index entry.
InsertNoPage	Inserts a no page index entry.
InsertNative	Inserts a native index entry.
InsertConditional	Inserts a conditional index entry.
DeleteAllIndexMarkers	Deletes all Index markers from the current document.
DeleteParagraphIndexMarkers	Deletes all Index markers from the paragraph the insertion point is located in.

Command	Description
InsertAllMarkers	Inserts all Index markers in the current document.
InsertOneMarker	Inserts the Index marker(s) for the current block of index entries the insertion point is located in.
ExpandIndexMarkersInDoc	Expands the existing Index markers in a document into Index Tools Pro index entries.
ShowHideIndexEntries	Toggles whether index entries are shown in a document.
UpdateAllMarkers	Inserts all Index markers for all documents in the active book.
ShowIndexEntriesBook	Shows the index entries for all documents in the active book.
HideIndexEntriesBook	Hides the index entries for all documents in the active book.
BuildComplIndex	Builds a comprehensive index based on the currently open books.
SetDocId	Specifies the ID of the document to be acted on.
SetBookId	Specifies the ID of the book to be acted on.

## Client name

For scripting commands to work properly, you must specify the name of the plug-in you want to access. The name depends on the platform on which you are using FrameMaker.

## Windows

For Windows, the Index Tools Professional plug-in is named “Index Tools Professional”. This is the client name that was given to the plug-in when it was created.

## Macintosh

For the Macintosh, the Index Tools Professional plug-in is named "IndexToolsPro". This is the filename of the plug-in that is installed in the Modules folder of the FrameMaker installation. If you change the name of the plug-in file, you must use the new name you have chosen.

## Scripting examples

The following examples show how to call commands in Index Tools Professional from FrameScript and the FDK.

### FrameScript

To control Index Tools Professional with FrameScript, you will use the CALLCLIENT command. Be sure that you use the appropriate client name for the platform on which you are using FrameMaker.

The following example shows how to use the CALLCLIENT command on Windows to insert all Index markers for the current document.

```
CALLCLIENT FrameClient('Index Tools Professional')  
Message('InsertAllMarkers') ReturnVal(retVar);
```

The following example shows how to use the CALLCLIENT command on the Macintosh to hide index entries for the files in the current book.

```
CALLCLIENT FrameClient('IndexToolsPro')  
Message('HideIndexEntriesBook') ReturnVal(retVar);
```



*Refer to the FrameScript documentation for more information about the CALLCLIENT command.*

### FDK

To control Index Tools Professional with the FDK, you will use the F\_ApiCallClient() function. Be sure that you use the appropriate client name for the platform on which you are using FrameMaker.

The following example shows how the F\_ApiCallClient() function is used on Windows to insert a standard index entry in a document.

```
F_ApiCallClient("Index Tools Professional",  
"InsertIdxEntry");
```

The following example shows how the F\_ApiCallClient() function is used on the Macintosh to remove all Index markers for the current document.

```
F_ApiCallClient("IndexToolsPro", "DeleteAllIndexMarkers");
```

## Background processing

If you will be running scripts with FrameMaker in the background, you must use an additional command to specify which document or book will be acted on. Do this using the **SetDocId** or **SetBookId** commands.



*It's necessary to use these commands only if scripts will be running while FrameMaker is in the background and is not the active application.*

### Syntax

Like other scripting commands, the **SetDocId** and **SetBookId** commands are string values. The command is followed by a space and then the string representation of the document Id or book Id. For instance, the following command specifies the document with the Id 12345:

```
SetDocId 12345
```

### Scope

The **SetDocId** and **SetBookId** commands specify which document or book the next command will affect. After the next command has been run, the scope is reset, meaning that subsequent commands will affect the currently-active document or book. If you want to perform several commands in succession, each command must be preceded by a **SetDocId** or **SetBookId** command.

### Script example

The following code for the FDK uses the **SetDocId** command to specify the document that will be affected by the next script command that is run. Notice that a document Id is converted to a string representation and included in the command.

```
StringT s = NULL;  
  
docId = { The Id of the document to be affected }  
  
s = F_StrCopyString("SetDocId ");  
  
s = F_Realloc(s, F_StrLen(s)+(IntT)10, NO_DSE);  
  
F_StrCatIntN(s, docId, (IntT)10+F_StrLen(s));  
  
F_ApiCallClient("Index Tools Professional", s);  
  
F_ApiCallClient("Index Tools Professional",  
"InsertAllMarkers");
```



## **Appendix E**

# **Quick Reference Card**



The following page contains a quick reference for the common commands in Index Tools Professional. You may want to print this page and have it available when you are making index entries.

# Index Tools Professional Quick Reference

## Index entries

### Making index entries

Index entry type	Keyboard shortcut
Standard	Esc i i
Start Range	Esc i s
End Range	Esc i e
No Page	Esc i n
Native	Esc i x
Conditional	Esc i c

### Showing/hiding index entries

Action	Keyboard shortcut
Show/Hide Index Entries	Esc i t

## Index markers

### Inserting index markers

Action	Keyboard shortcut
Insert all markers in document	Esc i a
Insert one marker	Esc i 1

### Deleting index markers

Action	Keyboard shortcut
Delete all markers in document	Esc d a
Delete markers from paragraph	Esc d 1



# Appendix F

## Registration

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Index Tools Professional is shareware, so you can try the software before you purchase it. The software is fully functional. As you evaluate the software, you will see periodic “reminder” messages indicating the software hasn’t been registered. If you find Index Tools Professional useful, we encourage you to pay the registration fee.

### License types

The following types of licenses are available for Index Tools Professional:

#### **Single-user license**

Each single-user license allows you to use one copy of the software on one computer. If you have fewer than 10 users, it’s most cost-effective to purchase single-user licenses.

#### **Site license**

A site license allows you to use copies of the software on any machine on the site. A site is defined as an area within a 100 mile radius. It’s most cost-effective to purchase a site license if you have 10 or more users.

#### **Worldwide license**

A worldwide license allows you to use copies of the software on any machine within the organization, regardless of where the installations are located. It’s most cost-effective to purchase a worldwide license if you have 10 or more sites where the software will be used.

## Registration methods

Silicon Prairie uses Kagi, an online payment processing service. To learn more about Kagi, visit them on the web at <http://www.kagi.com>. You can pay using the following methods:

### Online

You can purchase a license online through the Silicon Prairie web site (<http://www.siliconprairiesoftware.com>). There you will find a secure link to the Silicon Prairie page on the Kagi web site. This is the easiest and fastest way to obtain a license.

### Direct purchase

If you don't want to purchase online, you can contact Silicon Prairie Software directly to arrange payment. Contact us via e-mail at [support@siliconprairiesoftware.com](mailto:support@siliconprairiesoftware.com).

## Registration code

When you register the software, you will receive your registration code through e-mail. **Save this e-mail! You will need it if you need to reinstall the software.** If you printed this documentation, write the registration code here:

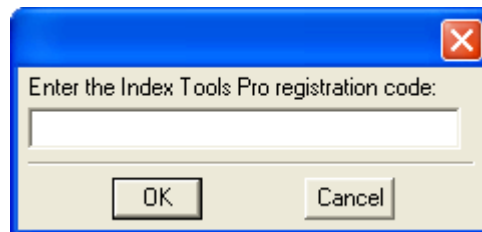
Registration Code: \_\_\_\_\_



To apply the code, choose the Register menu option via the Tools menu.

*To properly save the registration code, you must have privileges to write to the directories used for the FrameMaker installation. For Windows XP and earlier, this means being logged into the system as a member of the Administrator or Power User groups. For Windows Vista with User Account Control (UAC) this means running FrameMaker with Administrator credentials. You need to do this only for the session in which you register the plug-in.*

Enter the registration code you received in the dialog that's displayed.







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•••••

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