

SONAR[®] BOOKENDS[®] InDex

THE COMPREHENSIVE INDEX GENERATOR
FOR ADOBE[®] InDesign[™]

YearBook Edition Version 1

Macintosh and Windows
Combined User's Guide



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----- First Edition: March 2003-----

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Section I Introduction

About Sonar Bookends InDex Pro Yearbook Edition

Sonar Bookends® InDex Pro™ Yearbook Edition is a powerful index generator capable of producing an automatic index for Adobe's InDesign™ desktop publishing product. The yearbook version is streamlined to make the production of an index for a yearbook as simple and quick as possible. It can also make a table of contents based on style sheets. The index can include chapter/section names, can be made for any number of files, and can contain cross-reference information.

There are 4 simple steps in creating an index:

1. Mark the names in the yearbook that are to be in the index. Lists of names can be marked in one large block for speed and simplicity. All that is required is to mark the text, no other information needs to be entered.
2. After all marking is complete, issue the command to create a list of all marked names. The list will then appear with first and last names reversed and sorted alphabetically.
3. Edit the list of names if necessary.
4. Issue the command to make the index.

Other important features include:

- **Flexibility** - An index can be created for a single file or a group of related files. InDesign's "book" feature is supported.
- **Intelligent name reversal** - First and last names can be switched automatically. For example, "John H. Doe Jr." would become "Doe, John H. Jr." Names which are already reversed are not effected. Titles and two-word last names are taken into account.
- **Powerful sorting capability** - Leading articles and leading punctuation are ignored. Thus "The United States" would appear under "U" and not "T." Collating sequences (sorting order) are user-definable.
- **Upgradable** - After paying an upgrade fee, a different serial number is provided to change the product into the full professional version.

A glossary can be found in Appendix A on page 19.

Installing Sonar Bookends InDex Pro

To install the Sonar Bookends InDex Pro plug-in, see the ReadMe file in the Sonar Bookends InDex Pro folder.

Activating Sonar Bookends InDex Pro

When first installed, Sonar Bookends InDex Pro runs in demonstration mode **for the professional version and not the yearbook version**. Thus the demo shows a set of features that the yearbook version does not contain and is not recommended to evaluate the yearbook version.

The yearbook version can only be purchased by educational institutions.

To purchase Sonar Bookends Index Pro, contact Virginia Systems at:

Telephone number: (804) 739-3200
Fax number: (804) 739-8376
E-mail: sales@virginiasonline.com

Technical Support

It is important to fill-out and return the software registration card provided as a PDF file on the distribution CD or on Virginia Systems' web site (under "Downloads"). Technical support is only provided to registered customers. Upgrade notices are sent to the person and address contained in Virginia Systems' software registration database.

If there are any problems or questions, please call Virginia Systems between the hours of 9 AM and 5 PM Eastern Standard Time, Monday through Friday. Please be ready to provide the technical support representative with the serial number for Sonar Bookends InDex Pro.

Alternatively, questions can be sent to Virginia Systems' FAX number or e-mail address. Along with any questions, please include your:

- Name
- Serial number
- Telephone number
- FAX number or e-mail address

Contact Virginia Systems' technical support at:

Telephone number: (804) 739-3200
Fax number: (804) 739-8376
E-mail: support@virginiasonline.com

Section II Preparing to Make an Index

Document Organization

An index or a table of contents can be made for a document whether the document consists of either one file or multiple files. All of the files making up the document must be open in InDesign. You can either open the documents individually or open a book. *Since all open files (with the exceptions listed in the note below) are included in the index or table of contents, be sure that the only files which are open belong to the document to be indexed.*

Note: Files which are named “Word Phrase List” or “Index” or any file which has been selected as a word/phrase list using *Make Current File a Word-Phrase List* in the *Word-Phrase List* menu are exceptions to the rule and are not indexed.

File Naming Conventions When Indexing Multiple Files

If the document consists of multiple files, the naming of those files is critical. The names of the files being indexed should be in alphabetical order according to the order that each file appears in the document. For example, if a file named “B” contains pages 1-25, then the file which contains pages 26 through 45 could be named “C,” but should not be named “A.” If the second file was named “A,” then the page numbers would be correct, but would appear out of sequence in the index. For example, page 28 might appear before page 6.

The easiest naming convention is to start each file name with a three digit representation of the first page number in that file. For example, if a file has pages 24 through 28, that file could be named simply “024” or “024 organizations,” etc.

Section III Creating a Word/Phrase List

Note: This section only applies to making an index. This section can be skipped if making a table of contents.

In order to make an index, you must first create a “word/phrase list” of the people, places, and things you want in the index. The first step in making the name list is to mark the names where they appear in the yearbook. If you don’t want a particular occurrence of a name in the index, don’t mark that occurrence.

Marking Text to Create the Word/Phrase List

Names in an InDesign document must be ‘marked’ to be included in an index. To mark text, drag over the desired name and select *Mark Text* in the *Index* menu. See figure 3.1. (**Note that a function key can be assigned to the *Mark Text* menu item using InDesign’s “Keyboard Shortcuts” menu item. Using a keystroke makes marking names much quicker.**)

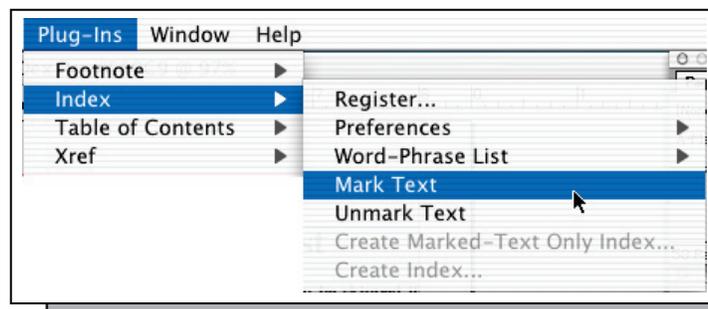


Fig. 3.1

Marked text is highlighted in blue-green so you can see what you have marked.

When you are marking a list of names you can mark the whole list at one time - much faster than marking the names one at a time. The names in a list are separated either with commas, carriage returns, the word “and” or an ampersand (&). For example, highlighting:

John Smith, John Doe, and Jim Jones

would produce

John Smith, John Doe, and Jim Jones

after selecting *Mark Text*.

Once all of the text is marked, the actual word/phrase list is made using *Build Marked Text List* in the *Word-Phrase List* menu as shown in figure 3.2.

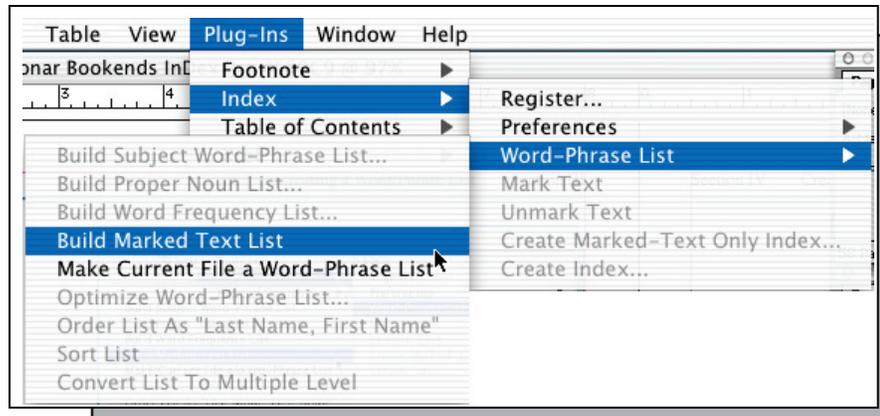


Fig. 3.2

The highlighting of marked text can be enabled or disabled using *Show Marks* in the *Preferences* menu as shown in figure 3.3

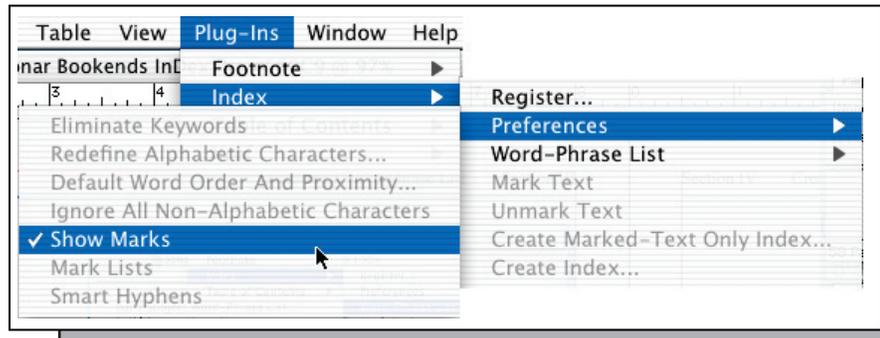


Fig. 3.3

The word/phrase list will now appear in a new window. All names will appear with first and last names reversed, duplicate names will have been removed, and the list sorted alphabetically by last and then first name.

The list can now be modified, if necessary - adding or removing names or manually unreversing any names that should not be reversed (like the names of organizations).

If you notice that a person's name appears in the list in more than one way (like "Humphrey, Patty," and "Humphrey, Patricia," and "Humphrey, Pat"), you can combine them all under one chosen name. Simply choose the name you want to appear in the index (Humphrey, Patricia), then put a semi-colon followed by each way the name appears in the yearbook. Each of those variations must be separated by a "|" character. The "|" character is an "or" operation. For our example of Patricia Humphrey:

Humphrey, Patricia;Humprey, Patricia | Humphrey, Pattie | Humphrey, Pat

You can now delete the entries for "Humphrey, Patty" and "Humphrey, Pat" from the index.

Section IV Making an Index and Table of Contents

To begin making an index, make sure that all the files that are to be indexed are open. *If all of the file names are in an InDesign “book,” just open the book.* Only open files or books are indexed. Also, if the word/phrase list is not already open, then open it and make sure it is the **front-most window**. Several word/phrase lists can be open at one time, but only the front-most is used to make the index, the others are ignored.

Select *Create Marked-Text Only Index...* in the *Index* menu, as shown in figure 4.1. *Create Marked-Text Only Index...* only indexes the text on each page that has been marked using *Mark Text* in the *Index* menu. If a name appears in the yearbook on four pages, but the name is only marked on three pages, the name will appear in the index on the three pages where it is marked.

Note: If *Create Marked-Text Only Index...* is dimmed, then the front-most window is not a word/phrase list or the word/phrase list needs to be tagged as such using *Make Current File a Word-Phrase List* in the *Word-Phrase List* menu.

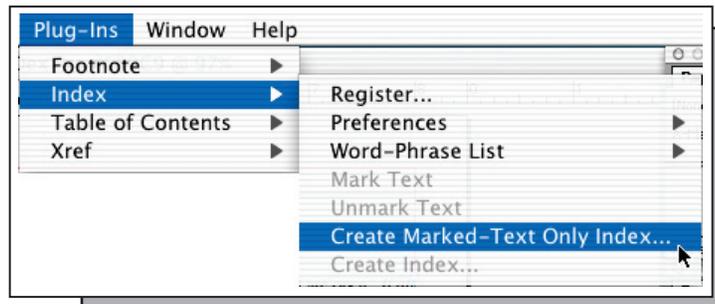
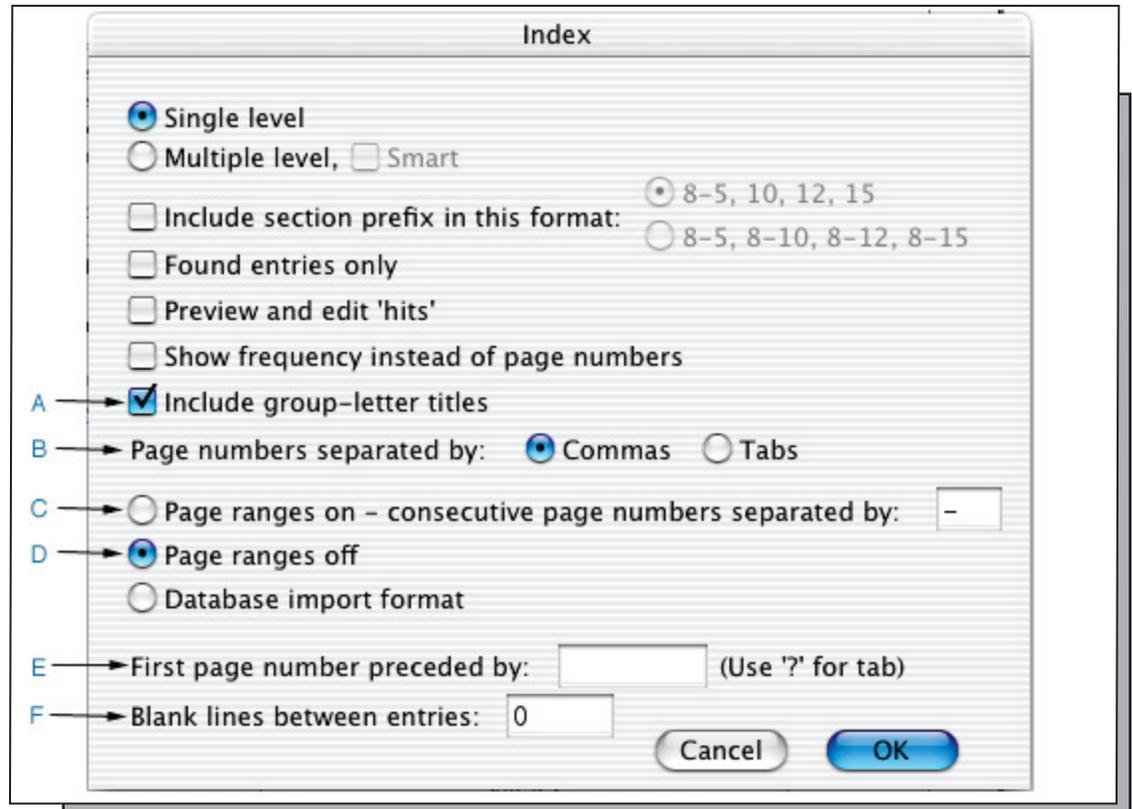


Fig. 4.1

The Index dialog box shown in figure 4.2 controls the indexing process. It controls what type of symbols are to be used to separate page numbers, how many blank lines should appear between entries, etc. By default all of these options should be set correctly for use in a yearbook index. Only those that you might want to modify are discussed next.

*Fig. 4.2*

Including Group-Letter Titles

Item [A] in figure 4.2 is used to break index entries into separate groups. The entries in each group have the same first letter, and that letter is put at the top of the group as a title:

```
A
Aardvark
Albatross
Arctic winters

B
Bavaria
Basic weather prediction
“Big-Bang” theory
The bust of Augustus
...
```

Notice that in the last two entries, above, leading punctuation and articles are ignored when breaking the index into groups.

When using the group-letter titles option, two style sheets are created and applied to the index. The first style sheet is named “SonarIndexTitle” and is applied to each group-letter title. The second style sheet is name “SonarIndexBody” and is applied to the rest of the index. By editing the “SonarIndexTitle” style sheet you can change the formatting for all the titles at one time. To change the format for all of the index entries, just change the “SonarIndexBody” style sheet.

Separating Non-Consecutive Page Numbers

Item [B] in figure 4.2 affects the separation of non-consecutive page numbers. Either commas or tabs can separate page numbers. Examples of the two methods of separation are shown in figure 4.3.

Smith, Mike 112, 189, 201, 256	Smith, Mike 112 189 201 256
<i>Comma Separators</i>	<i>Tab Separators</i>

Fig. 5.3

Abbreviating Consecutive Page Numbers

Consecutive page numbers (45, 46, 47, 48, 49) can be abbreviated (45-49). Item [C] in figure 4.2 enables abbreviation and identifies the single character that separates consecutive page numbers. A hyphen is the default, but a colon or any other single character can be used. A colon or a tilde (~) are good choices if the index is to contain hyphenated chapter names (“1-,” “2-,” etc.). This avoids confusing chapter names with consecutive page numbers:

1-2, 4, 6-12, 15

The above example shows chapter 1, pages 2, 4, 6 through 12, and 15. It would be clearer as:

1-2, 4, 6~12, 15

Selecting item [d] in figure 4.2 disallows any consecutive page number abbreviations, which is the default for yearbooks:

1-2, 4, 6, 7, 8, 9, 10, 11, 12, 15

Separating Index Entries and Page Numbers

The characters between each word or phrase and its first page number are controlled by item [E] in figure 4.2. The default value is a space, but any sequence of characters can be used. With the default, the index entry for “Nuclear energy” would look like this:

```
Smith, John 104, 110-114, 203
```

Changing item [E] to be “,” would change the index entry to look like this:

```
Smith, John, 104, 110-114, 203
```

The question mark (?) is a special character which is used to represent a tab character. Thus, if item [E] was set to “??” there would be two tabs between each word or phrase and its first page number:

```
Smith, John      104, 110-114, 203
```

Setting Blank Lines Between Entries

Item [F] in figure 4.2 determines how many blank lines are inserted between index entries. A value of zero will put one entry immediately below the other:

```
Smith, John 104, 110-114, 203
Smith, Yvonne 33, 45
```

A value of 2 will place two blank lines between each entry:

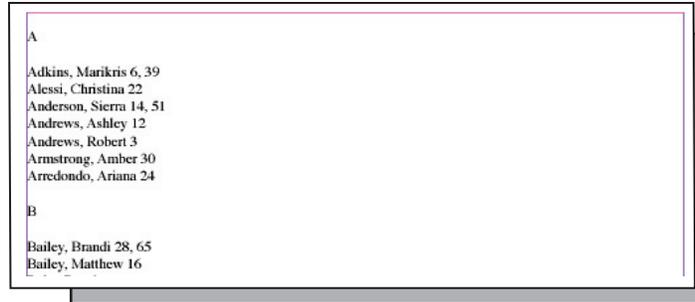
```
Smith, John 104, 110-114, 203

Smith, Yvonne 33, 45
```

When all desired options in figure 4.2 have been chosen, click the *OK* button to begin generating the index. The word-phrase list is automatically resorted and indexing begins.

When the index is complete, it appears in the Index window as shown in figure 4.3.

Note: If there are any mistakes discovered in the final index, the word/phrase list should be corrected and the index remade. This is important because if only the index is corrected, then each time the index needs to be made again, so do the changes!



A	
Adkins, Marikris	6, 39
Alessi, Christina	22
Anderson, Sierra	14, 51
Andrews, Ashley	12
Andrews, Robert	3
Armstrong, Amber	30
Arredondo, Ariana	24
B	
Bailey, Brandi	28, 65
Bailey, Matthew	16

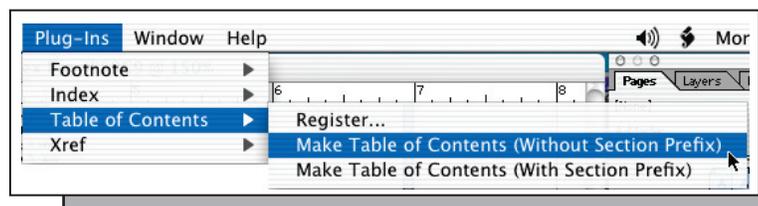
Fig. 4.3

Making a Table of Contents

To make a table of contents, you must indicate which parts of a document make up the titles, subtitles, etc. This is done using one or more paragraph style sheets. The style sheet's name is what tells Sonar Bookends InDex whether or not a block of text is to be part of the table of contents. The name can be anything you want, but it must start with the characters "TOC" (Table Of Contents) followed by a single digit number from 0 through 9. For example "TOC0Header style" would be a valid table of contents style sheet name.

The digit following the letters "TOC" tells Sonar Bookends InDex how many tab characters to place in front of the text marked with that style sheet. Thus titles would be prefixed with "TOC0" and subtitles with "TOC1". You can have as many table of contents style sheets as you want, including multiple style sheets for any given level.

The table of contents is generated in the same order as the titles and subtitles appear in the document. Each line contains only one page number. The page number is preceded by a tab character and, optionally, the "Section marker" text (referred to as the section prefix).

*Fig. 4.4*

Set some tabs stops, perform any other desired formatting operations and the table of contents is done!

Section V Controlling Name Reversal

There are two files that control how Sonar Bookends InDex Pro reverses names. The first file, named “SBITITLES.TXT” and located in the System folder, contains a list of titles. The titles file list is only used to verify titles that are not preceded by a comma. In other words “John Doe, Jr.” would reverse correctly even if “Jr.” was not in the titles file. “John Doe Jr.” would only reverse correctly if “Jr.” is in the titles file.

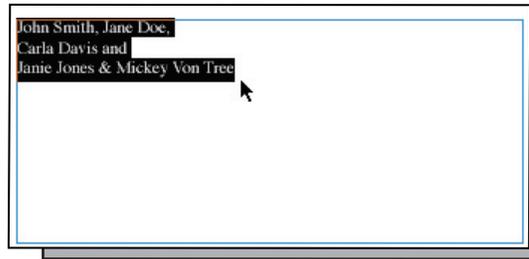
The second file, named “SBIPREFIX.TXT” and located in the System folder, contains a list of words which are the first word of two-word last names. For example, if “Von” is in the prefix file, then all last names that have “Von” in them (like “Von Tree”) are considered two-word last names and reversed accordingly.

Both the “SBITITLES.TXT” and SBIPREFIX.TXT” files are Unicode text-only and can be edited using InDesign. To edit a file, create a new InDesign document with an empty text box. Next, “place” the file into the text box. The text can now be edited as necessary. To save the modified text, “export” it as “text only” and, when prompted, save it with an encoding of “Unicode.” For the changes to take effect, quit and restart InDesign.

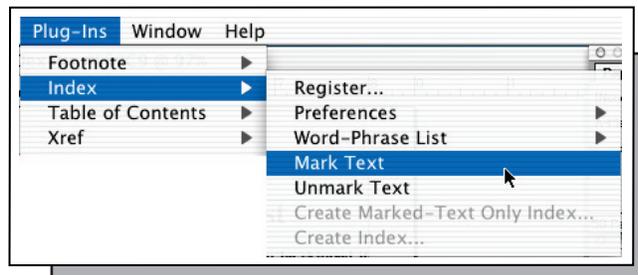
Section VI Tutorial

Start InDesign, open all of the files or books that make up the document to be indexed.

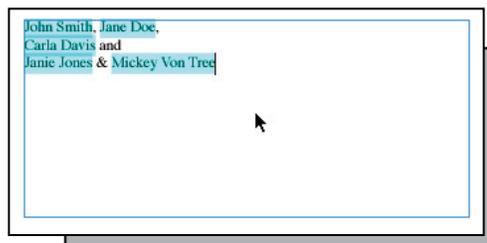
Highlight all of the names that are to be in the index. Remember that if you have a list of names separated by commas, carriage returns, the word “and” or an ampersand character (&), you can highlight the entire list of names at one time. If a name is not in a list, it must be highlighted separately.



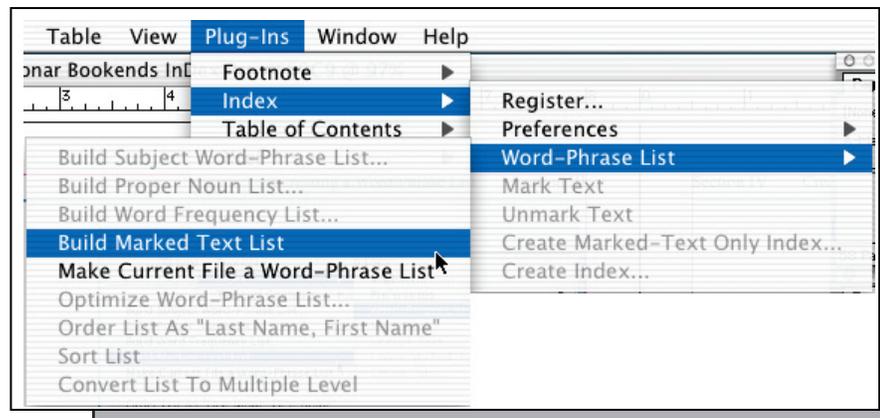
Select *Mark Text* in the *Index* menu when a name or list of names has been highlighted.



The marked names should now be highlighted in blue-green.



Once you have marked all of the names in all of the files that make up the yearbook, you must now build a list of those names. To do so, select *Build Marked Text List* in the *Word-Phrase List* menu:



After a short pause, a new window will open up. That window will have the list of names, in reverse order, sorted alphabetically, and with any duplicate names removed. You may now edit the list.

In editing the list, you will be typically looking for three things:

1. Mismarked names that are either too short or too long
2. Multiple spellings of the same person's name, including nick names
3. Names that should not be reversed - like club, organization and business names

In case 1, where you have not marked a complete name or have marked past the end of the person's name, simply go back to the page where the mismatch is, unmark the name, and then remark it correctly. If you don't know what page the mismatch is on, simply proceed to build the index and then you will have the page number or numbers where the mismatch occurred. Once you have corrected the marking, manually correct the entry in the word/phrase list.

In case 2, where the same person's name appears in different variations, you should combine the variations under one name. For example, let's say that the first 5 names in the word/phrase list has the following entries, where Pat, Patricia, and Pattie Anderson are the same person:

Akins, Michael
Anderson, Pat
Anderson, Patricia
Anderson, Pattie
Avila, Jose

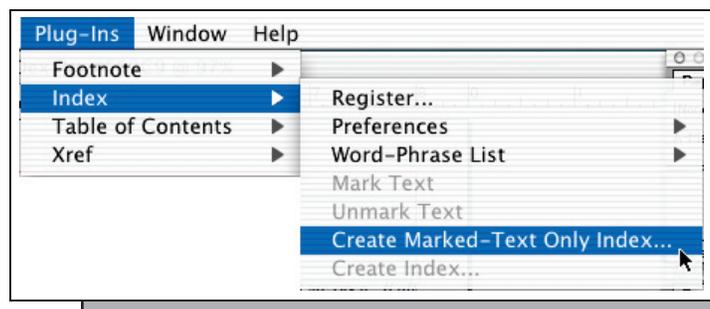
The three listings for Patricia should be combined into a single entry. To do this, simply select the entry that you want listed in the yearbook. Let's say it is Patricia. At the end of that name places a semi-colon (;), the name again, a "I" character, the next variation of the name, another "I" character, and next variation of the name, etc. When you have finished, delete the other variations from the list:

Akins, Michael
 Anderson, Patricia;Anderson, Patricia | Anderson, Pat | Anderson, Pattie
 Avila, Jose

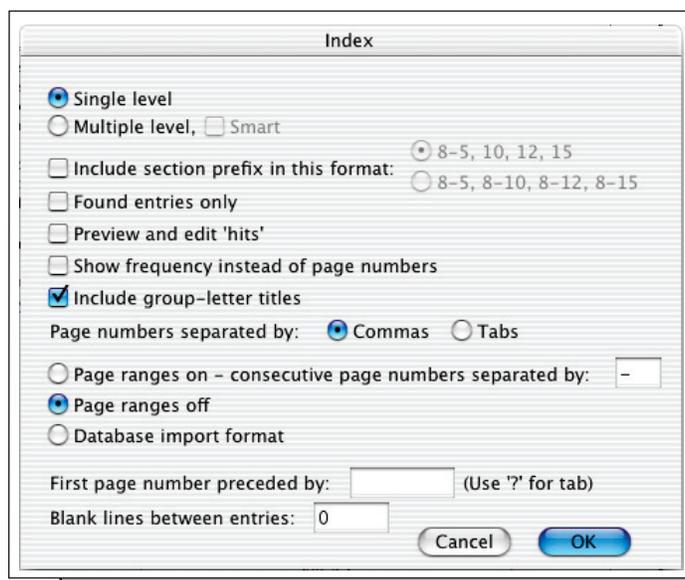
In case 3, upon finding a name that should not be reversed, simply reverse the name back manually.

In any case, as you edit the list don't worry about keeping the names in alphabetical order. The list will automatically be resorted when you make the index.

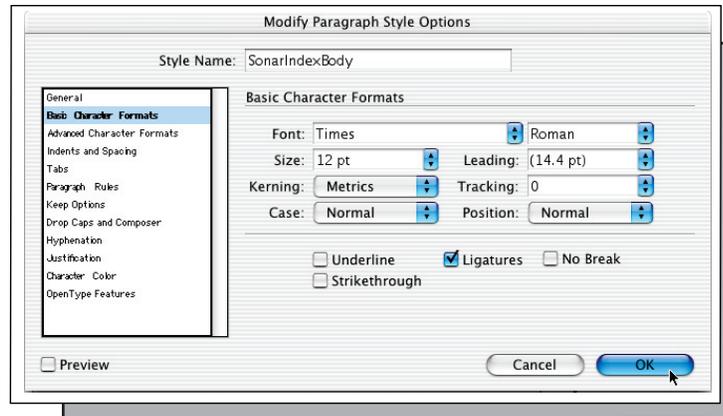
Once the list has been completely edited, you can now build the index. This is the easy part. Selected *Create Marked-Text Only Index...* in the *Index* menu:



The Index dialog box will now appear so you can adjust any options. Normally you would leave the default settings alone. To start the indexing operation, click the *OK* button:



Another window will open and the index will be displayed. You may now do any final formatting of the index. If you chose “Include group-letter titles” in the Index dialog box above, you can format the group-letter titles and the index entries by simply modifying two style sheets - **SonarIndexTitle** and **SonarIndexBody**:



Section VII Appendices

Appendix A - Glossary

Chapter/section prefix - Page numbers can be prefixed with the name of the chapter or section where the page numbers are contained. For example, if page 24 were in a chapter named “6-”, then the page number generated by Sonar Bookends InDex would be “6-24”. **The section prefix comes from InDesign’s “Section Marker” text in the Section dialog box.**

Collating sequence - The sequence into which the letters of an alphabet are sorted.

Consecutive page numbers - A series of page numbers that progressively increase by one.

Decimal tab - A type of tab stop where numbers are lined up on their decimal point, whether the decimal point is displayed or not.

Dictionary - A storage library of the words that exist in a document or folder. A dictionary is created when processing a file or folder.

Keyword - Treating a document as a series of words, ignoring punctuation, and spacing. By using keywords, Sonar Bookends InDex can index “John Doe” even though it may appear as “John, (Doe)” in the document.

Keyword elimination file - A list of words that are not to be placed into a word-frequency word/phrase list.

Linguistic studies - The study of languages. Such studies often include the frequency of words and phrases in documents.

Multiple-level index - An index where related entries are grouped together.

Phrase - One or more words.

Single-level index - An index where information is organized alphabetically and not by any kind of relationship.

Word/phrase list - A text only file containing the words and phrases that are to be in an index.

Appendix B - Error Messages

Dictionary damaged - Contact technical support should this error message appear.

Disk full - This disk is full, use another.

Insufficient memory - There is not enough RAM to process the request. If Boolean expressions are not being used in the word/phrase list, check the *Ignore All Non-Alphabetic Characters* item in the *Preferences* menu and try making the index again.

Appendix C - Menu Summary

<ul style="list-style-type: none"> Footnote ▶ Index ▶ Table of Contents ▶ Xref ▶ 	<ul style="list-style-type: none"> Indexing menu items Table of contents menu items
<ul style="list-style-type: none"> Register... Preferences ▶ Word-Phrase List ▶ Mark Text Unmark Text Create Marked-Text Only Index... Create Index... 	<ul style="list-style-type: none"> Register serial number to enable full indexing/TOC features Set indexing preferences Manipulate word/phrase lists Mark selected text for making a word/phrase list Unmark selected text Make an index of only the locations where text is marked Not used in Yearbook Edition
<ul style="list-style-type: none"> Register... Make Table of Contents (Without Section Prefix) Make Table of Contents (With Section Prefix) 	<ul style="list-style-type: none"> Register serial number TOC without section marker prefix TOC with section marker prefix
<ul style="list-style-type: none"> Eliminate Keywords Redefine Alphabetic Characters... Default Word Order And Proximity... ✓ Ignore All Non-Alphabetic Characters ✓ Show Marks ✓ Mark Lists ✓ Smart Hyphens 	<ul style="list-style-type: none"> Not used in Yearbook Edition Highlight marked text on/off Not used in Yearbook Edition Not used in Yearbook Edition
<ul style="list-style-type: none"> Build Subject Word-Phrase List... Build Proper Noun List... Build Word Frequency List... Build Marked Text List Don't Make Current File a Word-Phrase List Optimize Word-Phrase List... Order List As "Last Name, First Name" Sort List Convert List To Multiple Level 	<ul style="list-style-type: none"> Not used in Yearbook Edition Not used in Yearbook Edition Not used in Yearbook Edition Create a list of all marked words Make/Unmake front file a word/phrase list Not used in Yearbook Edition

Appendix D - Trouble Shooting

Problem: The *Create Marked-Text Only Index...* menu item is dimmed and cannot be accessed.

Solution: The front (active) file is not a word/phrase list. Make sure the front document is a word/phrase list. If the front document is not titled “Word Phrase List”, use the *Make Current File a Word-Phrase List* item in the *Word-Phrase List* menu to mark the front file as a word/phrase list.

Problem: When indexing a document consisting of multiple files, page numbers are correct, but out of sequence: Car, 1, 120, 40, 92

Solution: The file names being indexed are not in alphabetical order. Alphabetize the file names so that they are in the same order as they appear in the book.

Problem: When indexing a document, there are incorrect page numbers.

Solution: Only the files making up the document to be indexed and the Word Phrase List window should be open. Check to make sure that there are no other files open. If there are some extraneous files open, then they are being indexed.

Problem: Five asterisks (*****), indicating that Sonar Bookends InDex Pro cannot find a word/phrase list entry, follow entries that are definitely in the document being indexed.

Solution: Make sure that the spelling of the entry is correct. It is easy to accidentally substitute a zero (0) for the letter O, for example if you enter a name manually.

Problem: The index is to include chapter references as well as page numbers, but the chapter references do not appear.

Solution: Check *Include chapter names in this format:* in the Index dialog box. Also, make sure that you have entered the section/chapter name in the *Section Marker* field in InDesign’s *Section Options...* dialog box.

Problem: The page numbers for each section in a multiple section document always begin with page one, even though different starting page numbers had been manually specified.

Solution: In InDesign's general preferences, select *View: Section Numbering*. Do not use *View: Absolute Numbering*.