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WORD for Genealogy: Utilizing Microsoft® WORD in Genealogical Documents in Register, or Modified Register

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[NGSQ], Format, Part 3

Following discussions of automatic numbering and renumbering and internal hyperlinks, this installment of "Word for Genealogy" introduces automatic table generation.

Automatic table generation

Before describing the basics of automatic tables, let's review another fundamental WORD skill that is required, the Show All skill.

The techniques described here will always require that the author be utilizing the view mode in WORD known as Show All, which explicitly shows all paragraphs, spaces, and tabs you have inserted in the document, and much more, as we shall see.

To view a document in Show All mode, click on Tools on the main menu bar, click on Options, click on View, click on the box next to All, under Formatting marks, so that a checkmark appears. As before this process can be abbreviated to: click on Tools: Options: View: All. To Hide All, do exactly the same sequence, but turn off the checkmark by All.

A quick way to do this is simply to click on the toolbar button showing the paragraph symbol, ¶. Successive clicks on this button toggle between Show All and Hide All.^[1]

Toggleing between Show All and Hide All should be second nature to you because it will be used often. From hereon I will simply instruct you to Show All or Hide All, without further elaboration.

The basic idea for generating automatic tables is: (1) tag items to be entered automatically in a table; (2) insert the table where you want it to appear; and (3) cause the table to be automatically generated at the desired location, showing tagged items and page numbers on which they appear. You never have to know the page numbers yourself; this task is taken care of automatically by WORD.

The techniques described here can be used to generate a table of contents, a table of illustrations, a name index, a place index, and so forth. We will start with a simple name index.

To accomplish this task, we shall first tag each name as it is entered into our document. This explanation assumes you are viewing your document in Show All mode.

Tagging would be a torturous job should you wait until the last minute and try to do it at one pass. By far

the best policy is to do it as you go. That is, every time you enter a name to be indexed, tag it then. Here is how to accomplish the WORD tagging skill.

Click just left of a name you wish to tag for your name index. Here's an easy way to do it: Click Control + Alt + X. That is, type all three keys at the same time. This procedure opens up a dialog box. You may then enter a surname in the top box, and a first name or names in the second box. Then click Mark. A tag field that looks like { XE "Doe:John" }, is generated next to the name you are indexing.^[2]

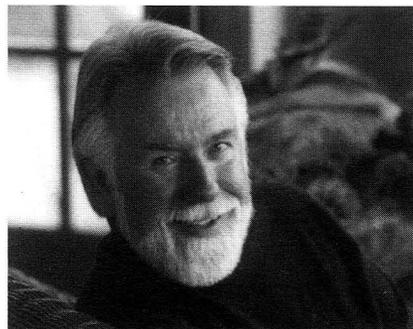
The dialog box stays open so that you can tag several names. To tag another name, you must click twice. The first click changes focus from the dialog box to the text document. The second click actually indicates where you want the next tag to appear. Then click on the dialog box to bring focus back to it, and proceed as before.

Example 9. Let's index our running example. Again there is no need to construct a separate Modified Register [NGSQ] format example, since precisely the same technique works in either case. The item below is presented as you would see it in Show All mode — except I have not bothered to show all the space, tab, and paragraph marks that would actually be displayed in this mode, since these marks would obscure the main message I am trying to convey. All items are tagged using the tagging skill just explained.

1. { XE "Partridge:Preserved" } PRESERVED¹ PARTRIDGE was born 1642, died 1701, and married in 1664 { XE "Partridge:Charity (Hopkins) } { XE "Hopkins:Charity" } CHARITY HOPKINS, who was born 1643, and died 1699.

Children:

- i { XE "Partridge:Zebulon" } ZEBULON² PARTRIDGE, born 1664.



Alvy Ray Smith. Courtesy Kathleen King Photography, Seattle, Washington.

- 2 ii { XE “Thomas:Experience (Partridge)” }
 { XE “Partridge:Experience” } EXPERIENCE
 PARTRIDGE, born 1666.
 iii { XE “Partridge:Bethuel” } BETHUEL PARTRIDGE,
 born 1668.
2. { XE “Thomas:Experience (Partridge)” } { XE “Partridge:
 Experience” } EXPERIENCE² PARTRIDGE (*Preserved*) was
 born 1668, died 1735, and married
 { XE “Thomas:Samuel” } SAMUEL THOMAS, who was
 born 1666, and died 1727.

IMPORTANT — The index tags for the same person in two different places must be *exactly* the same. For example, { XE “Partridge:Experience” } in one place but { XE “Partridge:Experience “ } in the other would produce two different entries in the name index, although they would appear to you as a duplicate entry. Do you see why? There is an extra space after Experience’s given name in the second instance. WORD’s indexing system would assume you meant two different people.

The only surprise in the example sketches above might be the second tags before Charity and Experience. It is typical in a name index to list women under both their maiden and married names. The second tags are to generate an index item for these two women under their married names. In these tag fields, the name to the left of the colon is the married surname, and to the right of the colon is the woman’s maiden name, with her maiden surname in parentheses.

Suppose Experience married a second time to William Twitchell. Then a third tag would be prepended to her name, looking like this { XE “Twitchell:Experience (Partridge) (Thomas)” }.

You will notice that tagging clutters up your document. The example above does not convey just how messy Show All can be, since I have not shown the space, tab, and paragraph marks. To see your document as others will see it, and to return yourself to sanity, simply Hide All.

Now we need to learn the skill of inserting an actual index table into the document. Although complicated, once done, this task never has to be repeated — unless you want to change the formatting.

Click on the place in your document where you want the name index to appear. For example, you might want to choose the very end of your document.

It probably goes without saying, but let’s be explicit. Since you are going to show page numbers in the name index, it only makes sense to have page numbers showing on your pages. I will assume you know how to insert page numbers into a footer or a header for each page.

At the desired location for the name index, do the following: Click on Insert: Field: Index. To find Index in the list more easily, you might want to click first on the Index and Tables item under Categories. Then click on the button labeled Index. Before clicking OK, consider the following:

I recommend the following choice of options in the dialog box to get started: leave unchecked the box next

to Right align page numbers; set Formats to From templates; set Type to Indented; set Columns to 1; set Language to English (U.S.); click on the button Modify and note that the formats listed there are Index 1, Index 2, etc. For now, I suggest using the default settings of these formats, but return here later to modify these formats. Click Cancel to exit the Modify dialog. Click OK to enter your name index table.

There are lots of variations on an index you might want to make. For example, for longer documents you will almost surely want two columns (or more) rather than one. You might want surnames listed in a different format from given names under it. I will save these formatting matters for a future installment. First let’s master the basics.

Example 10. Let’s assume that you have entered the name index field code at the end of your document, as just suggested. Let’s further assume that, for whatever reason, the sketch for Preserved Partridge appears on page 5 and that for Experience on page 49. In general, we don’t know what the actual page numbers are; WORD figures this out for us. When you click on OK, after the index table field code insertion, you will immediately see the following at the desired location. I am assuming a one-column table in indented format.

Hopkins
 Charity, 5
 Partridge
 Bethuel, 5
 Charity (Hopkins), 5
 Experience, 5, 49
 Preserved, 5
 Zebulon, 5
 Thomas
 Experience (Partridge), 5, 49
 Samuel, 49 ◆

In the next issue: A continuation of the discussion of automatic table generation and the conclusion of “Word for Genealogy.”

Notes

¹ If your toolbar does not have such a button, you may place one there by clicking on Tools: Options: Customize: View. Find the paragraph symbol in the list. Drag and drop it onto your toolbar.

² There is a difficult way also: click on Insert: Field: XE and then type in the name in the format required — for example, “Doe: John”, where the quotation marks are required.

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