

From *New England Ancestors*, Winter 2005, vol. 6, no. 1, 50-51, 54.

WORD for Genealogy: Utilizing Microsoft® WORD in Genealogical Documents in Register, or Modified Register [NGSQ], Format, Part 4

by Alvy Ray Smith

Following discussions of automatic numbering and renumbering, internal hyperlinks, and automatic table generation, this fourth and final installment of "Word for Genealogy" concludes the discussion of automatic table generation.

Now the final skill to learn is how to update an index that is already in place. Suppose twenty new persons have been added to your document, complete with index tags, since last you generated an index. To update the document, including the index, do the following:

1. Set Hide All mode.
2. Apply Select All to the document. One way to do this is to click on Edit:Select All. Another way is to click on your main document text somewhere. It doesn't matter where so long as it falls in the main body of text — the title page is a good place to click. Then type Control + A.
3. Click on the F9 key. If a dialog box appears asking you to make a choice between simply updating the page numbers in a table or updating the entire table, select the second option: Update entire table, and click OK. This might take a while to execute in large documents, since you've just asked WORD to do a lot of work.
4. Save your file.

Something I have glossed over until now is formatting an index. Let's revisit that topic. It is not difficult. Recall that I already showed you where to find the formatting styles called Index 1, Index 2, Index 3, and so forth that WORD uses for formatting indexes. Index 1 is for the first field, surnames in this case. Index 2 is for the second field, given names in this case. And so forth.

Here's how to modify one of these formatting styles: Click on Insert: Field: Index: Index: Modify: Index 1: Modify. This will open up a dialog box to allow you to set the format attached to style Index 1. You can choose bold or italic, for example. You can raise or lower the font size. You can change the type face. You can change the spacing before or after the line. And so forth. Before you click OK, do the following: Click on the box next to Add to template to turn on the checkmark there. Be sure that there is a checkmark in the box next to Automatic update.

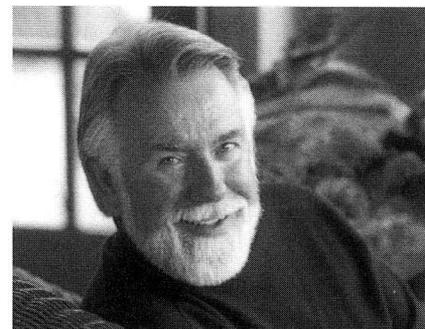
Now click OK. You might elect to repeat this procedure for Index 2. Now when you click on OK for the Index dialog box, the index generated will use the new formats.

Example 1. Delete the index previously generated and click where you want to insert a new one. This time we will modify Index 1 and Index 2 and use two columns. I set Index 1 to boldface but made no further changes. I set Index 2 to a smaller font size and tightened the spacing between lines. I set the number of columns to 2. And here is the new name index using these new settings:

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

Now let's generate a table of contents to demonstrate how the same skills used for indexes work for this task too. We enter a slightly different tag for a table of contents and a slightly different field code where the table is to actually reside in the document. Other than that, the same steps as above apply: (1) Insert tags; (2) insert table; and (3) update the table.

The tag to be inserted is obtained by Insert: Field: TC. Then you insert the text you want to show in the table of contents in the box provided. Before closing this dialog box, note the checkbox labeled Outline level. If you check this box, then you should enter a digit in the box to its right. If you enter a 1 then formatting style TOC 1 will be used. If you enter a 2 then TOC 2 will be used. And so forth. We will use the default table of contents form first, where the Outline level box is left unchecked, which defaults formatting to TOC 1. Then click OK to enter the table of contents tag.



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

Example 2. A good way to demonstrate table of contents tagging is by example, using our running example. What is shown here is the document as seen in Show All mode, sans the space, tab, and paragraph marks as before. The idea in this example is to enter each sketch into our table of contents. To that end we have inserted the TC tags in two places as just described. The XE index tags will show too, of course.

```
1. { TC "1. Partridge:Preserved" } { 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.
- ii { XE "Thomas:Experience (Partridge)" } { XE "Partridge:Experience" } EXPERIENCE² PARTRIDGE, born 1666.
- iii { XE "Partridge:Bethuel" } BETHUEL PARTRIDGE, born 1668.

... [Assume many pages here to make this example meaningful.]

```
2. { TC ". Experience Partridge" } { XE "Thomas:Experience
(Partridge)" } { XE "Partridge:Experience" } EXPERIENCE2
PARTRIDGE (Preservedd) was born 1668, died 1735, and
married { XE "Thomas:Samuel" } SAMUEL THOMAS, who
was born 1666, and died 1727.
```

VERY IMPORTANT: The numbers in the two TC tags are automatic numbers, not explicit ones. Otherwise the whole idea of automatic numbering is defeated. To accomplish this kind of numbering, the same field entered for the number at the beginning of the sketch is entered in the TC number position too. Recall that the field you inserted as the number field of the sketch is of the form SEQ Person [bookmarkname]. For the number field in the TC field code, you want exactly the same construct. The easiest way to ensure this construct is to select the number field at the beginning of the sketch, then copy and paste it (with Control + C and then Control + V) into the number field position of the TC field code. You, of course, can go through the pain of actually entering the same SEQ Person [bookmarkname] number field, if you want to.

I usually enter the sketch number field and the TC tag at the same time when I am writing a paper. I usually get this part of a sketch from one that I have already entered, with a copy and paste, then I change the name of the person. I then enter the SEQ person [bookmarkname] field into either the sketch number. Then here's a trick: Use F4 to repeat the last step exactly. In other words, IMMEDIATELY after I do the automatic number field insert, I select the TC number field and type F4. This key causes the identical number field to be embedded into the second place. This step only works if it is immediately the next thing you do. Remember to select the line and

type F9 to update the fields (or play it safe and Select All and F9).

As before, Hide All hides all the ugly tag fields and reveals what a reader will see.

Now let's enter the actual table of contents in a convenient location, say just after the title. Click there, click on Insert: Field: TOC, and then click on the button labeled Table of Contents. There are several formatting decisions to make.

I suggest the following as a starting point: Turn on Show page numbers, Right align page numbers, and select the dotted line for Page leader. Set Formats to From template. Set Show levels to 3. Check the box next to Use hyperlinks instead of page numbers. This one is an important setting, but ineptly named. What this setting does is turn on hyperlinks in your table of contents, which is very convenient. The "instead of page numbers" is merely confusing. Click on the box named Options and in the dialog box there turn on a checkmark next to Table entry fields and turn off all others, then click OK. This procedure returns you to the table of contents dialog box. Before clicking on OK here, consider the following:

Just as you did for indexes, click on the button labeled Modify. A dialog box is opened that lists the default formatting styles used by WORD for tables of contents. We will not modify these styles now, but note that TOC 1 will be used by default or for TC tag fields that include the switch \ 1. TOC 2 will be used for items tagged with \ 2 in the TC field. And so forth. For now, click Cancel, then click OK in the table of contents dialog box to cause your table to be generated in the place first indicated.

Example 3. Let's again assume that, for whatever reason, the sketch for Preserved Partridge appears on page 5 and that for Experience on page 49. When you click on OK, after the table of contents field code insertion described just above, you will immediately see the following at the desired location. I am assuming the formatting choices just recommended.

```
1. Preserved Partridge . . . . . 5
2. Experience Partridge . . . . . 49
```

N.B. This table of contents is "hot." That is, WORD automatically inserts hyperlinks from items in an automatically generated table of contents to the corresponding page. So a click on the second line above would take you directly to page 49 and Experience's sketch. Remember Use hyperlinks instead of page numbers? This is the checkbox that made your table "hot."

To update a table of contents after additions have been made, follow exactly the same updating procedure as described above for indexes: Hide All. Select All. F9. Choose the Update entire table option, if offered, then click OK. Save the file.

A word of caution: Do not attempt to edit an automatically generated table. You *can* edit one without a problem, but all edits will be lost the next time you do an automatic update. The only time it makes sense to edit

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such a table is immediately prior to publication when you know there are no further changes.

For the final example I will show you how to modify the formatting of a table of contents. You have probably already guessed how to do it.

Example 3. Assume that the tag fields for the two sketches above are changed to { TC “. Partridge:Preserved” \l 2 } and { TC “. Experience:Preserved” \l 2 }. Furthermore, assume that we introduced two subtitles in the document. One, before the sketches, being the following:

{ TC “Sketches” \l 1 }SKETCHES

and the other, before the name index, being this:

{ TC “Sketches” \l 1 }NAME INDEX

Notice that I have explicitly entered the “level” option \l 1 or \l 2 into these commands, which will cause WORD to use TOC 1 or TOC 2, respectively, to format the corresponding items. Then an update of the document would generate the following table of contents, where I have implicitly modified TOC 1 and TOC 2 to cause the following display:

SKETCHES.....	5
1. Preserved Partridge.....	5
2. Experience Partridge.....	49
NAME INDEX.....	93

There is one further item worth mentioning before closing: Named automatic tables. These tables are similar to named sequences of automatic numbers. The purpose is also similar: to allow the mixture of several tables in the same document while keeping their identities separate.

For example, suppose that you want a place index as well as a name index. This task is accomplished by inserting into each index tag a name field, such as \f “Place”, to indicate that the corresponding item is to go into the index table that is named *Place*. Thus an index tag inserted next to Boston in the text might look like this:

{ XE “Massachusetts:Boston” \f “Place” }

Then the Index field for the table itself must also have this \f “Place” option specified, where *the quotation marks are required*. You would enter a table such as this as follows: Click on Insert: Field: Index: Field Codes, and then explicitly typing in \f “Place” in the box provided, then click OK.

Similarly, suppose that you want a table of illustrations as well as a table of contents. In this case you don’t have to explicitly label the tagged items since WORD performs this task for you, but you do have to know to insert the option \f Figure in the TOC field used to generate the actual table of illustrations.

Finally, to see these field codes explicitly, and assuming you are really brave or just must edit them by hand, then do the following: Select the area whose field codes you want to see. Click on Tools: Options: View: Field code (under Show): OK. Uncheck the same box to return to normal view.¹¹

I can promise you that after a little while with these techniques, they become second nature, and greatly increase the flexibility of your genealogy document. You won’t be able to imagine how you lived without them, especially the hyperlinking and the automatic renumbering. ♦

Note

¹¹ If you find yourself performing this task often, you might want to put a button for it in your toolbar: Click on Tools: Customize: View: View Field Codes. Drag and drop this last item onto your toolbar. It is a button labeled with {a}.

Acknowledgment: I am greatly indebted to my two beta-testers, Marsha Hoffman Rising, CG, FASG, and Robert Charles Anderson, FASG, for helping me to debug this complex document.

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