INDEX BUILDER
YOUR GUIDE TO USING eDESIGN

Index Builder empowers you to customize your index to include what is best for your school. You can keep all the proper nouns it collects, including page topics and organizations, or you can ignore those and flow names only.

THE FIVE STEPS OF INDEXING

QUICK OVERVIEW

Subsequent sections of this document contain extensive details about how Index Builder works and how to use it, but a quick overview of the four steps of indexing gives a bird's eye view of the process.

Indexing can be done in one sitting — that's not a problem at all — but you are able to edit and manage the index throughout the year. Then you perform one last edit before flowing it on pages prior to submission.

1. **LAUNCH INDEX BUILDER TO COLLECT ENTRIES.** Go to the Book module > Edit menu > Build Index.

2. **EDIT THE INDEX ENTRIES.** Inside Index Builder, you can ignore, combine, edit, add, and fuse entries. See the following pages for details.

3. **FLOW THE INDEX ENTRIES ONTO PAGES**. Index Builder walks you through these tasks:

    *   Click "Next" in the lower right corner.
    *   Click "Yes" from the dialog box to delete any index previously placed on pages.
    *   Specify the starting page, and column/text settings.
    *   Click "Continue to Layout."
    *   Click through the pages and adjust the columns.
    *   Click "Flow Index."
    *   Click "Flow Index" again to confirm.

4. **REVIEW THE INDEX ON THE PAGES.** You could make changes directly on the pages, but the power of Index Builder is that you can make changes in Index Builder and easily reflow. That is preferable because when you reflow, eDesign will remove the index text from the pages, and changes you make on pages will be deleted.

WHAT INDEX BUILDER COLLECTS

CONSECUTIVE CAPITALIZED WORDS

Index Builder scans your book to collect consecutive capitalized words from the following places:

*   Text frames on pages
*   Name tags on images used on pages
*   Portraits used on pages
*   Topics and sections assigned in the ladder

This means you can create an Index of people in your book even if you don't include captions on pages by tagging images with names from the Name List.

Here are examples of the entries Index Builder collects. Remember, it's looking for two or more consecutive capitalized words that are not interrupted with punctuation:

*   Mary Smith
*   Anne Marie Jones
*   Beta Club
*   Boys Varsity Basketball
*   Homecoming Queen

EXCEPTIONS TO THE RULE

Index Builder is smart. It knows that some names aren't capitalized and that some have punctuation in them, so it also looks for these exceptions:

*   Lowercase prefixes such as "de" or "la"
*   Names that begin with titles such as Mr., Ms. Dr., and Mrs.
*   Hyphenated names

That means Index Builder will also collect names like these:

*   Carl Van der Hosen
*   Jamie de Soto
*   Dr. Santos
*   Ms. Tanika Lewis-Smith

To make your index collection more accurate, Index builder will exclude names that are preceded with bylines:

*   Photo by
*   Layout by
*   Story by
*   Written by
*   Copy by
*   Stories by
*   Photos by

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CREATING CHARACTER STYLES

Before you flow the index, you'll want to create character styles for the Index Letter (the letter separators) and for the Index Entries (the names and page numbers).

1. Go to Settings > Design Styles.
2. Click on Character Styles.
3. Create two character styles for Index Letters and Index Entries.
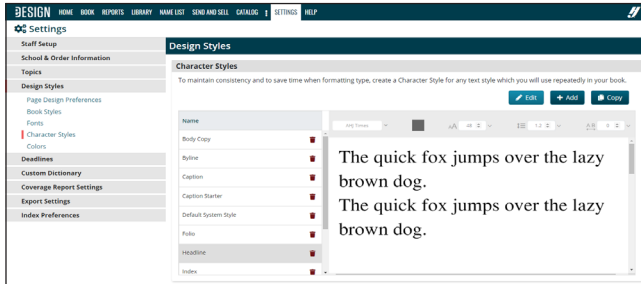
If you are working in Index Builder and realize you haven't yet created the character styles, simply click "Manage Character Styles" from one of the style menu dropdowns (see below). This will open Settings in another browser tab where you can create the styles.
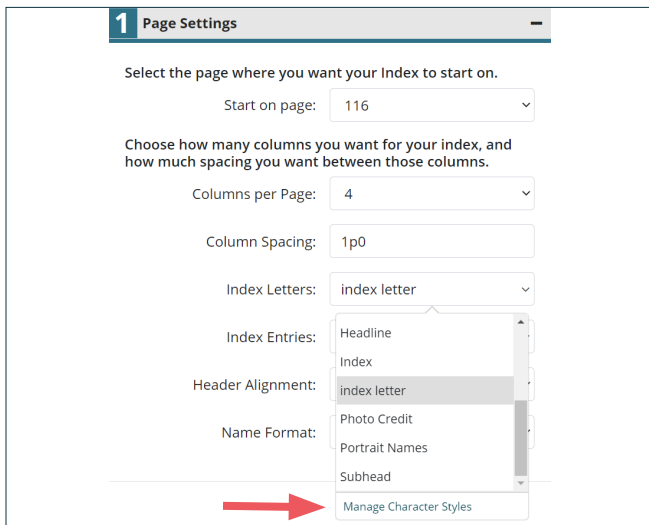
COLLECTING ENTRIES

To collect index entries, launch Index Builder from the Book module. Navigate to the Edit menu and choose Build Index.

Index Builder will then gather entries from text on pages, from images on pages, and from topics and sections applied to the ladder.
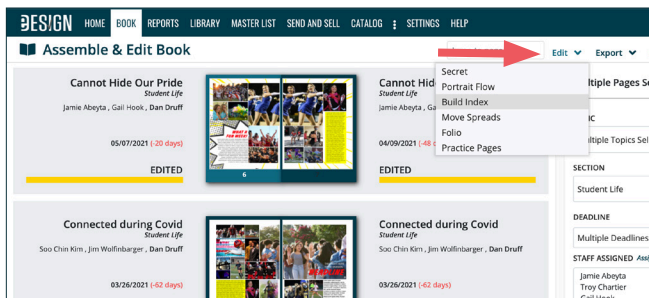
EDITING THE INDEX

YOU DON'T HAVE TO EDIT IN ONE SITTING

After eDesign compiles the list of all possible index entries, your next step is to edit the index. You don't have to edit it in one sitting. When you want to stop, simply click Save and Return to Book.
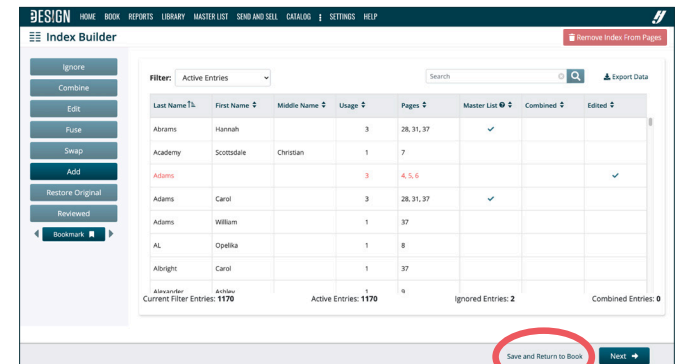
YOU CAN DENOTE WHERE YOU STOP

Before you close Index Builder, you can mark entries as Reviewed so you can focus your work. Here's how:

1. Filter by Non-Reviewed Entries.
2. Shift-click or Control/Command click the entries you've reviewed.
3. Click the Reviewed button.
4. When you return, just filter by Non-Reviewed Entries to continue.
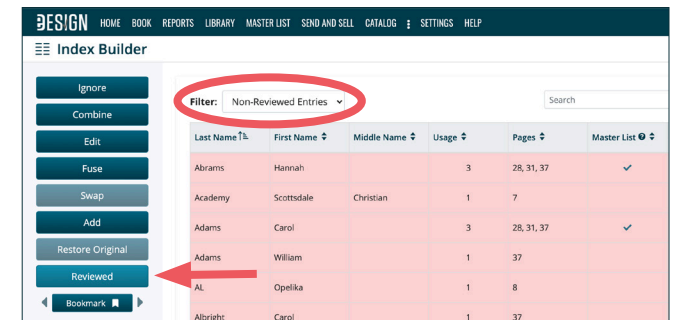
EDITING AN INDEX ENTRY DOESN'T CHANGE THE ORIGINAL

When you edit entries in Index Builder, keep in mind that eDesign does not change how the names appear on the pages where they originate. Editing entries only affects how they appear in the index.

### YOU HAVE NINE EDITING TOOLS TO ASSIST YOU

The following pages contain detailed descriptions of each tool Index Builder provides to assist you, but here's a list for a quick overview:

1. Ignore – removes an entry from the index
2. Combine – merges multiple entries into one
3. Edit – lets you edit an entry
4. Fuse – fuses first/last name into last name only
5. Swap – moves the middle name to last name
6. Add – lets you add a new entry into Index Builder
7. Restore Original – removes any edits
8. Reviewed – lets you indicate you've reviewed it
9. Bookmark – marks an entry for an easy find later

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IGNORE

The most common edit you'll make is ignoring the entries you don't want to flow onto the index pages.

To exclude an entry, click on the entry, and click Ignore or use the keyboard shortcut "Shift I". The name is then removed from the current view.
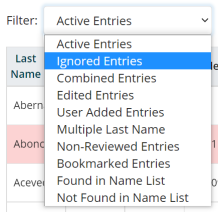
Index Builder doesn't delete ignored entries; rather it saves them so you can restore them if you need to.

To view ignored entries, choose Ignored Entries from Filter menu.

While in this view, you can select an entry, and then click Undo Ignore to make it appear in the index once again.
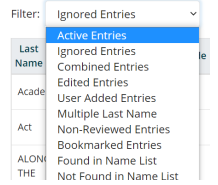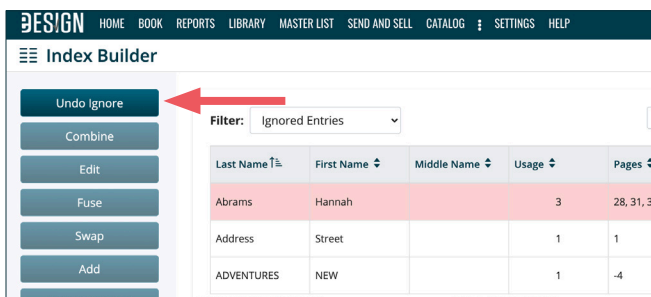

When you are finished viewing the ignored entries and want to return to editing the active entries, go back to the Filter menu, and choose Active Entries.
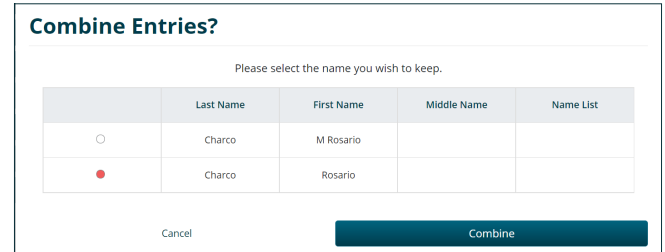
COMBINE

Another common action is to combine several entries into one entry.

For example, the entries Cindy Reynolds, Mrs. Reynolds, Coach Reynolds, and Cynthia Reynolds would all need to be combined into one entry since they are all referencing the same person.

To do this, click the first entry. Then press and hold the Control/Command key and click the other entires to select them all.
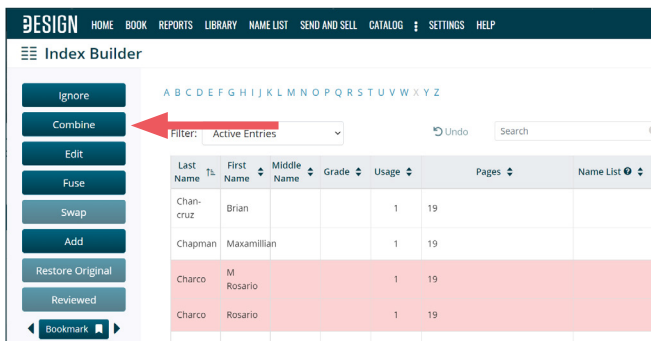

Then click the Combine button on the left or use the keyboard shortcut "Shift C". It will prompt you to choose how you'd like the entries to appear in the Index. Make your selection, and click OK.

When you combine names, a check mark will display in the Combined column to the right of the entry. You can hover over the name to see the names it was combined with.
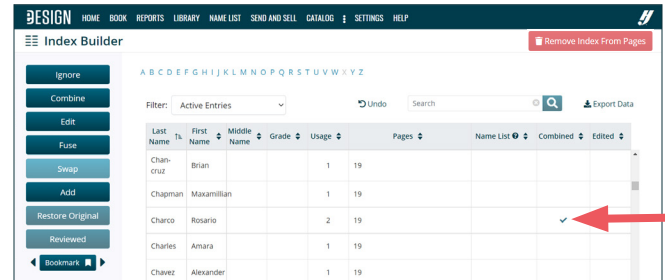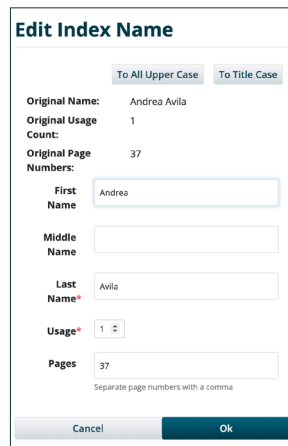

If you decide you want to uncombine entries, simply click the name, then choose Undo Combine from the options on the left.
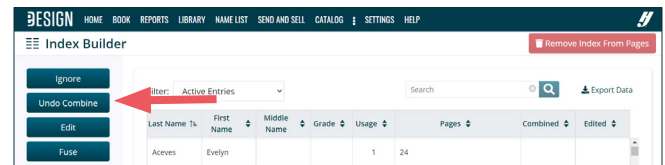
EDIT

When you select an individual entry, you can click Edit to change the spelling of the names, the page numbers, and the usage count.

You can also change upper case to title-case, and vice versa. You can make this change to multiple entries at one time. Simply Shift-click to select a block of names or Control/Command-click to select individual names, click Edit, and then choose the case you want to use.

To help you easily find edited entries, you can filter by them or look for a check mark in column for Edited Entries. To undo an edit, select the entry, and then click Restore Original.

UNDO

The "Undo" button that will undo your most recent action, like Combine or Ignore.
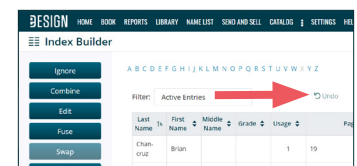
FUSE

Fuse gives you the ability to control how clubs, business names, and other organizations appear in the index.

For example, you may have an entry for "Society, National Honor." When you fuse that entry, Index Builder will swap the first and last name fields and combine it into one last name entry so that it will flow in the correct place alphabetically.

Here are a few examples of what fuse will do:

• "Society, National Honor" becomes "National Honor Society"
• "Hardware, Ace" becomes "Ace Hardware"
• "Band, Jazz" becomes "Jazz Band"

Here's how an business name, for example, looks before it is fused:

Here's how it looks after it is fused. See how it is now in the W's?

One topic you might choose to NOT fuse are team names. For example, you could fuse "Basketball, Varsity Boys" to become "Varsity Boys Basketball." That would flow it with the other V entries. However, you may choose to flow it in the B section for Basketball.

Some schools flow teams alphabetically by the sport name, not by level. For example, you could choose NOT to fuse teams so that they flow all together in the index like this:

Basketball, Freshmen Boys 101, 102
Basketball, Freshmen Girls 102, 104
Basketball, Junior Varsity Boys 106, 107
Basketball, Junior Varsity Girls 108, 109
Basketball, Varsity Boys, 110, 111
Basketball, Varsity Girls 112, 113

SWAP

Often students have three or four components to their names, not just a simple first name/last name configuration, so names in the middle can end up in the wrong columns. The Swap function helps correct that. For example:

• "Ramirez, Anna Gomez" becomes "Gomez Ramirez, Anna"
• "Ramirez, Anna Julia Gomez" becomes "Gomez Ramirez, Anna Julia"

Here's Timothy Vander Wright before the swap in the W's:

Here is his entry after the swap in the V's:

ADD

When you click the Add button, you'll add a name, its page number(s), and usage count. You could add an entry Index Builder does not

collect, like "Band", or you may want to insert a name because you know a person is on a page, but their name was not tagged in an image or included in the caption. You can also add an entry to separate students who have the same first and last name by adding a middle name or initial. When you add an entry, Index Builder will make the text red.

RESTORE ORIGINAL

This button allows you to undo any edits you've made to an entry. Edits to index entries are saved as you make them. For this reason, the only way to undo a change is to use "Restore Original." To undo edits to an entry, simply click on an edited entry, and then click Restore Original.

REVIEWED

You don't have to review the entire index every time you build an index. Instead, you can mark entries as having been reviewed so that when you return for a subsequent session you can filter by Non-Reviewed Entries. To mark an entry as Reviewed, do the following:

1. Filter by Non-Reviewed Entries.
2. Shift-click or Control/Command click reviewed entries.
3. Click the Reviewed button.

Continue reviewing or come back later.

BOOKMARK

As you edit the index, you may encounter entries you want to research before changing. You can bookmark these entries to make them easy to find in a subsequent session.

To bookmark an entry, simply click on a name, then click Bookmark. Use the arrow keys on either side of the icon to jump back and forth among bookmarked entries or filter by Bookmarked Entries. To remove a bookmark, click on the name, and click the bookmark button.

SORTING AND FILTERING

You can sort the list of index entries by clicking on any of the headings. One click sorts the entries in ascending order, based on the selected column. A second click sorts the entries in descending order.


The Usage column tells you the total number of references to an entry. This can help you monitor coverage, which you can also do with the Coverage Report, but the two reports are different:

   Coverage Report – compiles coverage according to entries that match the Name List

   Index Builder – finds all consecutively capitalized words, not only names in the name list, so it's more comprehensive
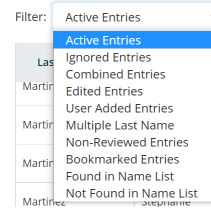
The Pages column shows you the page number where each entry appears in the book.

Instantly scroll to the first last name entry for that letter by using the "Alphabet Quick Links".
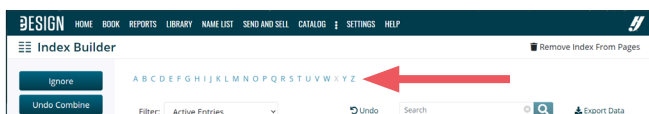

FILTERING ENTRIES

There are several ways to filter the list. Select one of the following from the Filter menu:

- Active Entries – Displays all non-ignored entries.

- Ignored Entries – Displays entries you have ignored. You can click an entry and choose "Undo Ignore" to restore it to Active.

- Combined Entries – Displays all of the entries you combined. Hover over the combined entry to see the original entries.

- Edited Entries – Displays all entries you edited. When you click on an entry, you can edit it and to restore it to its original.

- User-Added Entries – Displays all entries you added manually. The text displays in red so you can easily spot an added entry.

- Multiple Last Names – Displays entries with more than one word in the last name field.

- Non-Reviewed Entries – Displays entries you have not marked as Reviewed to help you focus on the ones you haven't seen yet.

- Bookmarked Entries – Displays entries you have bookmarked.

- Found in Name List – Displays entries whose first and last names match a person in your Name List.

- Not Found in Name List – Displays entries whose first and last names don't match a person in your Name List.

SEARCH

The search field empowers you to quickly find anything. Its dynamic filtering means as you type, it will begin to filter the entries based on each character you type. It is a very quick way to find and edit entries using names or page numbers.
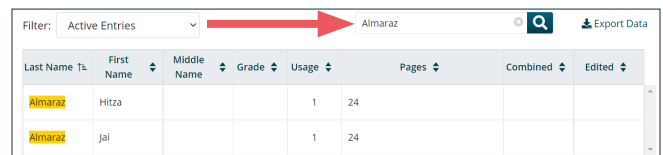
PRO TIPS FOR EFFICIENT EDITING

One way to expedite your work is to search for terms that quickly find entries to edit. Below are pro tips for efficient and thorough editing.

STEP 1 – SEARCHING FOR COMMON WORDS

If you search for a common word like "cheer," it will find all entries for cheerleading, which makes it easy for you to format them consistently.

- Searching for these words will quickly reveal entries you need to ignore, fuse, combine, or edit.

- Searching for these common terms will give you ideas for others words you should search for that pertain to your book's content.

- Keep in mind that searching is not case sensitive, so you don't have to worry about capitalization.

- Also, since the search function filters dynamically, you don't have to type the entire word. You can enter "fresh" to find all instances of "freshmen" and "freshman," or you could enter "var" to find all instances of "Varsity" and "Junior Varsity."

Remember – it is NOT mandatory to search for the terms on this list. This is simply an optional method to quickly find entries that are likely candidates for editing.

SEARCH FOR THESE WORDS AND EDIT WHAT YOU FIND

Club	Principal	Junior
Team	Assistant	Senior
Varsity	Editor	Congratulations
Junior	By	Spirit
JV	Adviser	Pride
Day	Advisor	Community
Month	Sponsor	Unity
Year	Headmaster	Student
Week	Dean	Teacher
Book	Coach	Learn
University	Manager	Study
College	Mr.	Class
State	Mrs.	Test
School	Ms.	Quiz
Academy	Director	Exam
Honor	Department	Yearbook
Society	Chair	Ad
President	Freshmen	Page
Secretary	Freshman	Life
Treasurer	Sophomore	Division

SEARCH FOR THESE GROUPS OF WORDS AND EDIT WHAT YOU FIND

- Prepositions – above, across, against, along, among, around, at, before, behind, below, beneath, beside, between, by, down, from, in, into, near, of, off, on, to, toward, under, upon, with

- State of Being Verbs – is, am, was, are, were, be

- Pronouns – we, us, them, you, he, she, it, they, him, her, their

- Conjunctions – for, and, nor, but, or, yet, so, because, since, once, even, than, that, though, unless, until, when, where, while, whether, why

- Words Common to Your School – Your school's name (search each word separately), your school colors (search each one separately), your mascot (if you are the bulldogs, search for "bulldog," "dog" and "dawg"), your city name (each word separately), your county name, your state name, etc.

- Numbers –one, two, three, four, five, six, seven, eight, nine, ten, eleven, twelve

STEP 2 — SORT BY MIDDLE NAMES
Another pro tip is to sort the index by middle name to reveal entries that might need to be combined with other entries or edited.

To do this, click on the header of the middle name field to alphabetize the index by that field. Clicking again will bring to the top all entries with a middle name.

First, scan the entries with middle names for any that need to be ignored, and then click to ignore them.

Then, one by one, search for the first name of each entry with a middle name to see if there are other versions of that student in the index, and then combine as needed.

Examples:

- Mary Beth Grimes could be listed twice, once with Mary Beth in the first name field and another time with Beth in the middle name field. If you search for "Grimes," you'll find them both and can combine them.

- Jose Rodriguez Martinez could be listed three times, once as Jose Rodriguez, a second time as "Rodriguez Martinez" as the last name, and a third time with "Rodriguez" as the middle name. If you search for Jose, you'll find all three versions that you can easily combine into one.

- Kristina Van Der Housen could be listed multiple times, once as Kristina Van Der Housen and once with "Van Der" in the middle name field with the last name of "Housen." If you search for Kristina, you'll find them all and can combine them efficiently.

STEP 3 — SORT BY LAST NAME
Then sort by the last name field and scan with your eyes down the first name field to spot duplicate first names. That will help you find entries to combine and ignore.

STEP 4 — SORT BY FIRST NAME
Then sort by the first name field and scan with your eyes down the last name field to spot duplicate last names. That will help you find entries to combine and ignore.

HONORABLE MENTION
If you have a name list imported, the name list column allows you to see which entries match the Name List and which do not. This will help you combine multiple entries into one, being able to see which name is the correct one.

You can also filter for "Not Found in Name List" to find entries that aren't names at all (ie. "Touchdown Trevor").

EXPORTING DATA

The Export Data button at the top right allows you to download a report that shows all the included entries in the index in its current sort order.

You can simply click on the Export Data icon and Index Builder will export a .csv file. You can open the file in any program that supports .csv files like Microsoft Excel or Google Sheets.

REMOVE INDEX FROM PAGES

The Remove Index From Pages function removes the index text frames on pages from a previous flow. What it does NOT do is delete the index from inside Index Builder. Your edits to the index will remain saved inside Index Builder even after you click "Remove Index From Pages."

Removing the index is not something you have to initiate. When you flow the index, if there are index text frames already on pages, eDesign will ask you for permission to remove the index before it flows the entries.

To manually remove the index text frames from pages, click the Remove Index From Pages button in the upper left. Then click "Yes" in the dialog box that will pop up.
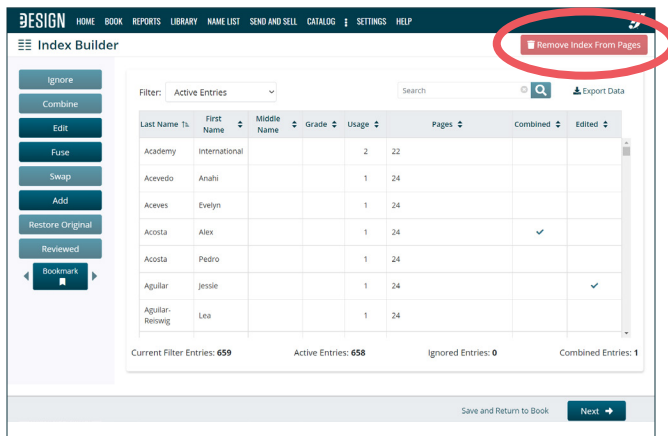
eDesign will open those pages, remove the index text frames, and close those pages – and don't worry; it won't delete content you put on those pages. It will only delete the index text frames it put there.

FLOWING THE INDEX

When you flow the index, you'll need two character styles, one for the letters and one for the entries. If you haven't yet created those, you'll need to do that first. You can keep Index Builder open and simply launch eDesign in another tab, or you can close Index Builder by clicking "Save and Return to Book."

1. Go to Settings > Design Styles.
2. Navigate to Character Styles.
3. Create two character styles: Index Letters and Index Entries.
4. Go back to Book, and launch Index Builder from the Edit menu or click back to Index Builder if you had it open in another tab.

For more info on Character Styles, see page 2 of this document.

CLICK "NEXT"

To initiate the flow of an index, click "Next" in the lower right.
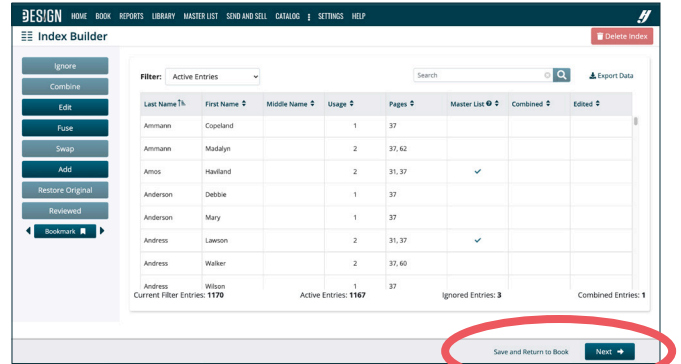
If you have flowed an index in a previous session, Index Builder will prompt you with this message: "The existing index will be removed from the book. Do you want to continue?"

Clicking "Yes" will remove the previous flow from the index pages. It will not remove other content from those pages. It will only remove the text frames it flowed with the index entries.
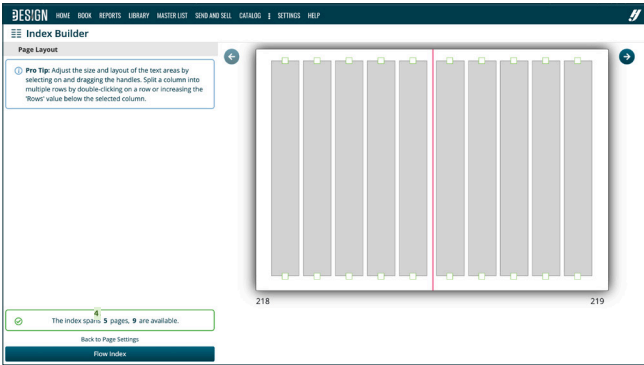
SPECIFY PAGE SETTINGS

First, select the page where you'd like the index to begin. Then specify the number of columns you'd like on each page and the space between columns. Most schools use 3-5 columns per page with one pica between them. Select the character styles you created for the letters and the entries. Then specify the header alignment and the name format – it defaults to "Last, First" but you can include the middle initial or middle name. You can click on Back to Name List if you want to go back to all the entires, or if you want to flow, click "Continue to Layout."
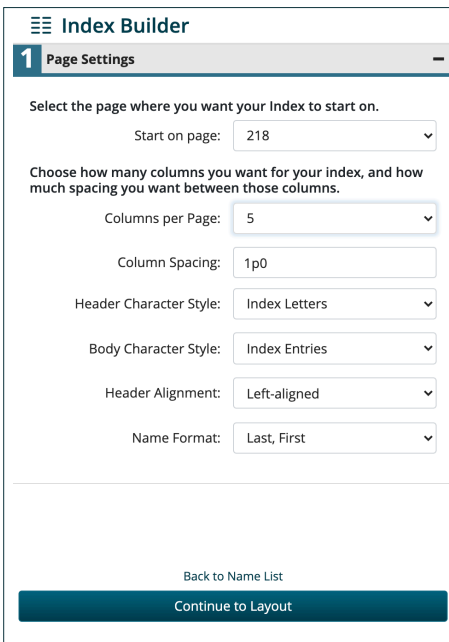
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CONTINUE TO LAYOUT
When you click "Continue to Layout," eDesign shows you a rendering of the columns on the pages you have selected.

- If you realize you have selected the wrong pages for the index to start, choose "Back to Page Settings" to make adjustments.

- If the index is too long and it runs across too many pages, you can choose "Back to Page Settings" to increase the number of columns and to make sure you've selected the correct character styles. Sometimes that's all it needs.

However, if the index still too long or is too short, you'll need to modify your character styles.

- The easiest method is to open eDesign in another tab to access Settings there. However, you can also click "Back to Name List," and then "Save and Return to Book," and navigate to Settings > Design Styles > Character Styles, and edit the character styles.

- Adjust the character styles to make the index longer or shorter as needed. Don't forget you can adjust the font, the size, and the leading. The leading can make a significant difference on the overall length of the index, and a condensed version of the same font can also make the index shorter.

When you're finished adjusting the character styles, go back to Index Builder and advance through the steps of flowing the index.

ADJUST INDEX COLUMNS
In page layout, you can click through the preview page-by-page and adjust each columns if you wish. You can adjust the height of the columns to leave room for candids or other artwork, you can split a column into separate rows, or you can skip a column altogether.
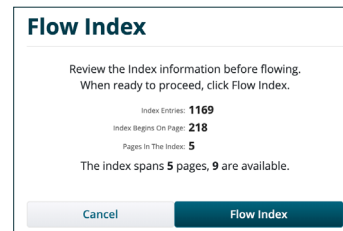
- *Adjust Column Height* - To adjust the height of a column, click one of the handles and drag it either up or down.

- *Split Column* - To split a column into multiple rows, change the number in the Rows dialog box at the bottom of the row. You can split a column into 1-5 pieces. You can also split a column just by double-clicking it.

- *Skip Column* - To skip a column (leaving a column of white space), enter a zero in the Rows dialog box.
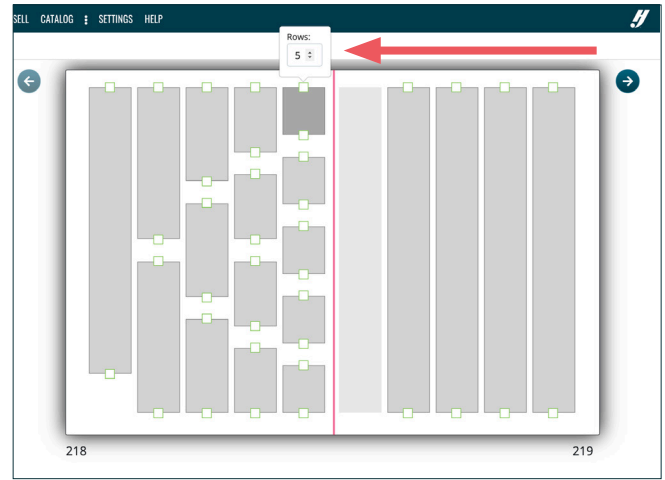
Before you proceed to the next step, scroll through all the pages and adjust the columns as needed.

FLOW THE INDEX
When you are ready, click Flow Index. Index Builder will give you a summary and an opportunity to cancel or to proceed. If you click "Flow Index," it will flow them onto pages, close Index Builder, and return you to your ladder.

REVIEW THE INDEX PAGES & REFLOW ANY TIME YOU'D LIKE
After flowing your index, you may edit these pages just like any others. However, you should only edit the index entries if you are making small changes and aren't planning to reflow. If you do need to reflow, you should not make changes directly on the pages. It's optimal to make the edits inside Index Builder and reflow than to make changes on the pages. Then, once you're ready to re-flow, you can simply walk through the same steps for flowing an index.

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