The goal of this self-study guide is to help you learn how to use the Build Index feature to create customized index pages for your transcripts.
Automatic Indexing Self-Study Guide

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Automatic Indexing Self-Study Guide

I. Indexing – Easier Than You Think

The Build Index feature and Index Templates are not as commonly used as they should be, and because of that, many CATalyst users work a lot harder than they have to when creating index pages for their examinations, exhibits, etc. The reason that this feature goes unused is simple: most CATalyst users are afraid that it is too complex to learn.

However, Indexing is not difficult to set up or use – there are simply a lot of options available to accommodate the wide variety of preferences and/or requirements for index pages. All you need to know is which options apply to you and your index page(s).

The goal of this guide is to familiarize you with the most commonly used elements of indexing and provide you with enough information to identify the elements required on your own index page(s), to select the items you need from the available options and then incorporate the required items into your dictionary, include files and/or transcripts to take full advantage of this time-saving feature.

First, we will go over the broadest and most basic concepts that will pertain to everyone, and then we will walk through each of the options available to you to tailor the feature so that it will produce index pages that meet (as closely as possible) your specific requirements.

II. Automatic Indexing is Basically a Copy and Paste Feature

Most reporters (who do not use the Build Index feature) create an index page as follows. They will make notes (usually via a pen and paper) as to what page certain items (such as when a speaker begins an examination, where exhibits are marked/received, etc.) appear in the job. They will include a standard index page that has headings and blank spaces, and then manually type in the information they want on the index page.

The idea of the Build Index feature is that rather than take notes with pen and paper and then type that information into the transcript at the appropriate spot, you can copy and paste text that already exists in the transcript onto an index page that is created in the appropriate spot. Very simply, you will surround any item that appears in your transcript text with a set of Index On and Index Off format symbols and then the Build Index command will:

- copy the text between those format symbols
- paste it into the appropriate position on an Index page
- generate a page number for that information

The Index On format symbol is inserted by pressing F4 I. The Index Off symbol is inserted by pressing F4 i. You can surround text with Index On and Index Off format symbols by marking it and then pressing F4 I.

III. Categories/Vertical Formatting

Items appearing in the transcript that are referenced on an index page come in certain categories such as examinations, exhibits, certified questions, information requested, etc.
When I build the index page, I don’t want CATalyst to give a list like this:

Direct Examination by Mr. Jones.............................. 4  
Exhibit No. 1................................................ 10  
Information Requested........................................ 12  
Exhibit No. 2................................................ 23  
Cross Examination by Mr. Smith............................... 35

I want CATalyst to put all of the Examinations together, all of the Exhibits together, all of the occurrences of Information Requested together, etc.:

Direct Examination by Mr. Jones.............................. 4  
Cross Examination by Mr. Smith............................... 35  
Exhibit No. 1................................................ 10  
Exhibit No. 2................................................ 23  
Information Requested.........................................12

To tell CATalyst's Build Index command that certain items should be grouped together, you will add a category letter to each Index On and Off symbol.

For example, let’s say that on my Index Page, I have four categories of information - examinations, exhibits, questions the witness was instructed not to answer, and blank lines where information was requested, appearing in that order. I will refer to examinations as category "A", exhibits as category "B", unanswered questions as category "C" and info lines as category "D".

When I surround text with the Index On and Off symbols, I will specify these categories. For example, let's say that on my Index page I want the text BY MR. JONES to appear for examinations. I would mark BY MR. JONES and then press F4 I A to insert the <Index On A> format symbol before the word BY and <Index Off A> after the name JONES.

Let’s also say that I want the exhibit number or letter from an exhibit parenthetical to appear on my Index page. I would mark the exhibit number or letter and press F4 I B to insert the <Index On B> format symbol before that exhibit number or letter and <Index Off B> format symbol after the exhibit number or letter.

Therefore, rather than have each item listed on the index page in the order they appeared in the transcript, the items will be grouped together in categories. Within each category, each item will be listed chronologically (in the order that they appeared in the transcript).

(NOTE: If you prefer, you can use the numbers 0-9 instead of, or in addition to, the letters A-Z for categories.)

You now have the most basic and necessary information about using Indexing! You could stop right here and gather all the information for your index page using the Build Index command.

However, there are a number of other index features that will help you customize the presentation of the information on the index page. Therefore, read on to take advantage of these additional features.
IV. Horizontal Formatting

As described earlier, most reporters that do not use Build Index include a standard index page and then type in the information for the index onto that page. When using the Build Index feature, you do not need to include a standard index page file. Instead, you create a file called an Index Template which will be copied and pasted into your job when you use Build Index.

The Index Template is a form that contains the page heading and category headings which identify what information will be placed on the page (e.g. INDEX at the top of the page, EXHIBIT NO. on the far left, DESCRIPTION in the center, PAGE on the far right).

It also contains tables that hold the space for the transcript text that will be copied/pasted to the index page. In CATalyst, tables are used whenever you want text aligned in columns.

Inside each table cell in the Index Template is the Index On format symbol that corresponds to the information that will be pasted to that cell, or in the case of the page number, generated in that cell.

V. How to Create a New Index Template

(NOTE: At this point, it’s not important to try to create an exact match for your index page – this is just a simple example/exercise to understand how to create any Index Template file, and how Index symbols as described above would be inserted into an Index Template.

When you are ready to build your Index Template, you can use the methods described below or use the Index Template Wizard to assist you in the process. It will be easier for you to understand and use the Index Template Wizard if you first walk through this exercise and learn the concepts explained in Section VIII – Tools to Customize Your Index Results.)

A. Double click the System Files case.
B. Double click the Index Templates case.
C. Press Ctrl+n to create a new document.
D. Name this file My Index Template (or whatever name you prefer). Use the layout that is appropriate for your index page. Press Enter, or click Open (or press Alt + o).
E. Once you are in Edit, click View, Page (or press Alt + v, p) to select Page View. (This will be necessary later on when you insert a table and want to adjust the grid lines.)
F. Type the page and category headings, and position them as appropriate using format symbols.

Let’s say this is an example of what you would want to appear at the top of an index page generated by the Build Index command:

<table>
<thead>
<tr>
<th>EXAMINATION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BY MR. JONES</td>
<td>4</td>
</tr>
<tr>
<td>BY MR. SMITH</td>
<td>27</td>
</tr>
</tbody>
</table>
1. Press **F4** to insert the `<Centered Paragraph>` format symbol and then type INDEX. Then, press **F4 L** to insert the `<New Line Paragraph>` format symbol. *(See Image 1.)*

![Image 1](image1.png)

2. Type EXAMINATION. Press the **Tab** key until the cursor is positioned where the word PAGE should go. Type PAGE. Press **Home** to move the cursor back to the word EXAMINATION. Press **Shift + Right Arrow** to mark EXAMINATION and then press **F4 U**. This will underline the word EXAMINATION. Move the cursor to the beginning of the word PAGE. Press **Shift + Right Arrow** to mark the word PAGE and then press **F4 U**. Then, press **Ctrl + End**. *(See Image 2.)*

![Image 2](image2.png)

G. Click **Edit, Table, Insert Table**. Next, you will be prompted to insert the number of columns. In this example, you would want one column for the information that will line up under EXAMINATION, and one column for the information that will line up under the word PAGE. At the Number of Columns field, select 2. We’ll accept the default of 1 row – we’ll discuss
when to use multiple rows a little later on. Click **OK** (or press **Enter**) to insert the table. *(See Image 3.)*

![Image 3](image3.png)

H. When a table is inserted, you automatically get columns of equal width. However, the page number information only requires a very narrow column, and the information for the Examination column should be able to extend further to the right. Therefore, you will adjust the left and right margins for each of the cells.

To do this, click the cell that you want to adjust, then click and drag the left and/or right margin symbols (ﷺ) until the cells are sized as desired. *(See Image 4.)*

![Image 4](image4.png)

**TIP:** You can type the largest possible page number you imagine might be needed (e.g. 9999) in the cell under page number, then move the slider until the column is just wide enough to accommodate that many digits. Then, delete the numbers you typed.
I. Next, insert the appropriate format symbols into the table cells. Click the first cell (on the left, under EXAMINATION), and press F4 I A (the <Index On A> format symbol). (NOTE: It is not necessary to insert an <Index Off> format symbol into the table in the Index Template file.) Next, click the second cell. Press Shift + F4 to bring up a list of format symbols, scroll down to the <Index Page> format symbol, and then double click <Index Page> or press Enter. Format symbols don’t appear in the text window, so to view the format symbols as you are inserting them, or after you have inserted them, open the Reveal Codes window by pressing Ctrl + Shift + R. (See Image 5.)

![Image 5](image)

J. Next, you may want to change the alignment of the page number. Right now, page numbers would line up under the P in PAGE and then grow to the right. For example:

<table>
<thead>
<tr>
<th>EXAMINATION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BY MR. JONES</td>
<td>4</td>
</tr>
<tr>
<td>BY MR. SMITH</td>
<td>27</td>
</tr>
</tbody>
</table>

This is because the current Paragraph Style is New Line Paragraph, and text is set in the layout to align to the left margin. If you want the page numbers to align to the right margin and grow to the left…

<table>
<thead>
<tr>
<th>EXAMINATION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BY MR. JONES</td>
<td>4</td>
</tr>
<tr>
<td>BY MR. SMITH</td>
<td>27</td>
</tr>
</tbody>
</table>

…you will need to change the alignment. To change the alignment, you will either use the Right Justify command or use the Modify Current Paragraph command.

First, click in the cell under the word PAGE. Position the cursor in between the <Table Cell Start> and <Index Page> format symbols. (If you are unable to do this in the text window, you may find it easier to do this in the Reveal Codes window. Click the Reveal Codes window to move the cursor to that position.)

Type the letter x. This will enable you to see where the text currently aligns, and where it will
align once you change the alignment. Next, press the **Left Arrow** to position your cursor at the beginning of the x. *(See Image 6.)*

![Image 6](image6.png)

Next, if you have the **Right Justify** icon displayed on your Edit toolbar, click it to right align information in that column. If you do not have that icon displayed and do not wish to modify the Edit toolbar, there is another method.

Click **Format, Modify Current Paragraph** (or press `Alt + o, p`). In the Modify Current Paragraph dialog pane, under **Alignment**, select **Right** and then click **Apply** (or press `Alt + a`). This will insert a `<Paragraph Delta Justification>` format symbol. This symbol tells CATalyst to align the information in that column (the Index Page number) to the right margin. *(See Image 7.)*

![Image 7](image7.png)
Now, press **Ctrl + End** to move the cursor to the end of the file, and press **F4 L** to insert a <New Line Paragraph>. This will move the cursor out of the table and enable you to type additional text headings and/or insert additional tables, as needed as well as correctly display the right-justified text in the cell under the word PAGE. *(NOTE: Even if you do not need to type additional information, you MUST insert a New Line Paragraph or Continuation Paragraph format symbol after the table.)*

K. Once you have the correct alignment, you no longer need the X in that column. Position your cursor on the X and press **Delete**. *(See image 8.)*

L. When you’re finished with the above steps, press **Ctrl +s** to save the changes to this file. Then, press **Ctrl + F4** to close the Index Template file.

When you build an index using “My Index Template”, it will copy any text that appears between <Index On A> and <Index Off A> format symbols in the job, and paste the text into the first column of this table on the index page, and generate a page number reference in the second column.

To add additional headings and tables for exhibits, certified questions, etc., you will open the My Index Template file and repeat steps F-L.

*(NOTE: Instead of walking through steps F-L to create each table for your Index Template, you can use the Index Template Wizard. Detailed directions to use the wizard are included in the Index Template Wizard Self-Study Guide. Stenograph recommends that you be familiar with the concepts in Sections I-V and VIII of this Self-Study Guide prior to using the Index Template Wizard.)*

When you have finished creating the “My Index Template” file, save the changes, and then close the file. If there are any errors that would prevent the Index Template from being used by the Build Index feature, when you attempt to exit, you will be prompted that there are errors in the index template. Click **Yes** at the prompt to display the list of any/all problems in the file. For example, suppose you entered <Index On A> in one cell of the table but did not insert an <Index Page> format symbol in that same table: the error message would detail that omission.
After you have corrected any errors, save and close the file.

VI. Surrounding Text with Index Symbols

Before you can use the Build Index feature to place a copy of the Index Template in the transcript and fill the tables with the appropriate text and page numbers, you must indicate what text should be copied to the index page.

In the example we have been using:

```
INDEX

<table>
<thead>
<tr>
<th>EXAMINATION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BY MR. JONES</td>
<td>4</td>
</tr>
<tr>
<td>BY MR. SMITH</td>
<td>27</td>
</tr>
</tbody>
</table>
```

The text that will be copied from the transcript to the index page is BY MR. JONES and BY MR. SMITH.

Therefore, in the body of the transcript, the occurrence of BY MR. JONES should appear as <Index On A>BY MR. JONES<Index Off A> (when viewed in the Reveal Codes dialog pane). The occurrence of BY MR. SMITH should appear as <Index On A>BY MR. SMITH<Index Off A> (again, when viewed in the Reveal Codes dialog pane).

These index symbols can be inserted directly into the transcript while you edit. You can mark BY MR. JONES, then press F4 I A and BY MR. JONES will be surrounded with the <Index On A> and <Index Off A> format symbols.

However, you can do this faster and more efficiently by including these symbols as part of the definition or include file that brings BY MR. JONES into the transcript.

For example, let’s say that you have steno such as /STPHAO/STKPWHR or /SKWROEPBS/SKWROEPBS/STKPWHR defined as text such as <By-Line>BY MR. JONES:<Question> in a job dictionary (or EZ Speakers Dictionary, or Personal Dictionary). You can modify that dictionary entry to include the Index On and Index Off format symbols; e.g. <By-Line><Index On A>BY MR. JONES<Index Off A>:<Question>.

The same is true if you use another method to bring in a speaker ID, such as an Include file or EZ Text entry:

```
EXAMINATION

BY ^ ATTY:
```

If you use an include file that looks something like this, you can insert the <Index On A> symbol after the <By-Line> or <New Line Paragraph> format symbol and before the word BY in the include file. You can insert the <Index Off A> format symbol after the ^ ATTY and before the colon.

The same holds true for any text that you want to have copied to your index page via the Build Index feature. You can insert the Index On and Index Off format symbols directly in the transcript text. Or, if the text appears in an include file or in a definition, you can surround the text in that dictionary entry or include file, and the index symbols will be brought into the transcript during translation or when the file is included.
VII. How to Build an Index Using an Index Template

A. Optional: Insert an Index Position format symbol.

Build Index will create the index page at the end of the job unless you specify a different position in the transcript.

If you would prefer your index page to appear anywhere other than at the end of the transcript, position the cursor in the spot where the index page should go, then press **Shift + F4** and scroll down to **<Index Position>**. Double click the **<Index Position>** format symbol or press **Enter** to insert it into the job.

For example, if you want the index page to be built immediately after the Appearances page, insert the **<Index Position>** format symbol at the end of the Appearances page.

★ **TIP**: You can insert the **<Index Position>** format symbol into include files so that you don’t have to insert the symbol into each and every job.

Do not put **<New Page>** format symbols immediately before or after the **<Index Position>** format symbol – the Build Index command will automatically separate the index page(s) from the text that precedes and follows it.

IMPORTANT NOTE: When Build Index generates Page and Line Numbers, they are **dynamic**, rather than fixed. This means that the page numbers automatically update themselves. If you were to edit the job after building the index and the results of that editing moved the position of items that had already been referenced in the index – the section, page and/or line numbers on the index page would automatically update to reflect the new position of that information.

*(NOTE: If you copy and paste the indexed information (e.g. from one position in the transcript to another position), the generated page (line and/or section) numbers will no longer be dynamic – they will be converted to fixed/static text.)*

B. Click Tools, Index, Build Index (or press **Alt + t, n, b**).

C. In the Build Index dialog box, click the checkbox next to Use Index Template (or press **Alt + u**).

D. Click the Browse button. Double click the index template file (e.g. "My Index Template") that you want to use for this job or select it and then click Open (or press **Enter**).

E. Click OK to build the index.

*(NOTE: If Build Index encounters a potential issue, where Case CATalyst found items you might want to be aware of, a message box displays with OK, Cancel & Details... buttons. Clicking Details... will open an RTF log file and display information identifying and locating the errors. If you select to view the log file before clicking OK, be sure to close the log file before continuing. Clicking OK will continue to build the index. Clicking Cancel will stop the building of the index.)*

VIII. Tools to Customize Your Index Results

Thus far, we have explored the broadest and most basic concepts that pertain to anyone using Build Index and Index Templates. Next, we will tackle the most common customization options that
will enable you to modify your Index Template and use additional format symbols within the transcript text to generate an index page with the information you need, in the format you prefer.

A. <Index Section>, <Index Page>, <Index Line>

You already know to place the <Index Page> format symbol where you want the page number referenced for the indexed information.

However, suppose you want or need additional information, such as the line number where the indexed information appeared, or the section number. The <Index Section> and <Index Line> format symbols work the same as the <Index Page> symbol.

For example, suppose your index page references “Questions Instructed Not to Answer”, and you need to note the page and line number where these questions occurred, e.g.:

```
QUESTIONS INSTRUCTED NOT TO ANSWER
PAGE      LINE
27        2
```

In the Index Template, you would create a table with three columns and one row. The last two cells would be sized to line up with the positions where the page and line numbers should appear. In the first cell, you would put the <Index On> format symbol. In the second cell you would put <Index Page>. In the third cell, you would put <Index Line>.

```
QUESTIONS INSTRUCTED NOT TO ANSWER
PAGE      LINE
<Index On C> <Index Page> <Index Line>
```

As with <Index Page>, there are no assigned shortcut keys to insert the <Index Line> or <Index Section> format symbols. You will need to click the Format Symbol button on the toolbar or press Shift + F4 to bring up a list of format symbols, scroll down to <Index Line> or <Index Section> and then double click or press Enter to insert those symbols.

B. Right Align Page, Line or Section Numbers

When you insert the Index Page, Index Section or Index Line format symbols, the numbers generated will align to the left margin of the table cell. For example:

```
EXAMINATION         PAGE
By Mr. Jones         4
By Mr. Smith         37
```

Many reporters prefer that the numbers align to the right, for example:

```
EXAMINATION         PAGE
By Mr. Jones         4
By Mr. Smith         37
```

To cause page, section or line numbers to align to the right:

✓ Press Ctrl + Shift + r (Default keyboard map) or r (CAT4 kbd keyboard map) to open Reveal Codes. Make sure there are no extra spaces between <Table Cell Start> format symbols, or if the last cell in the table, between the <Table Cell Start> or text within the cell and the <End Table> format symbol.
✓ Position the cursor before the text to be aligned in the table cell.

☞ NOTE: If setting alignment for a page number in an Index Template, position the cursor before the <Index Page> or <Index Cell> format symbol.

✓ There are two ways to change the alignment.

→ Click the Right Justify icon on the Edit toolbar.

or

→ Click Format, Modify Current Paragraph (or press Alt + o, p).
→ In the Modify Current Paragraph dialog pane, under Alignment, select Right.

✓ Click Apply (or press Alt + a).

This will insert a <Paragraph Delta Justification> format symbol that contains instructions to align the information in that table cell as selected.

C. Add Leader Dots in a Table

“Leader dots” are a row of periods from the end of text to the end of the cell. A common example of where “leader dots” might be used is between an exhibit description and the page number:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Photograph of front end of car..........</td>
<td>4</td>
</tr>
</tbody>
</table>

To add Leader Dots (or any other preferred character, such as – or =) after the exhibit description, you would edit the Cell Properties of the cell containing the description:

✓ Click Edit (or press Alt + e).

✓ Click Table (or press b).

✓ Click Cell Properties (or press p).

✓ Check the box next to Extend Last Line of Cell with character, and type a period (or whatever character you prefer).

✓ Select Align Top (or press Alt + t) or Align Bottom (or press Alt + b).

If you select Align Top, then the leader dots (characters) will follow the first line of text in the cell. If you select Align Bottom, then the leader dots (characters) will follow the last line of text in the cell.

★ TIP: If you want to have the leader dots extend right up to a right-aligned page number, position the left margin of the page numbers column immediately adjacent to the first position for the page number.
D. No Text to Index

Sometimes you may want to have numbers for <Index Section>, <Index Page> and/or <Index Line> generated without copying any text to the index page. Some common examples of this requirement are Questions Instructed Not to Answer, Certified Questions and/or Information Requested.

Where there is no text to surround, simply insert the <Index On> and <Index Off> format symbols without text between them.

For example, for certified questions or questions instructed not to answer, somewhere in the body of that question you can insert <Index On Q><Index Off Q>. For “information requested” (a blank line left in a transcript for the witness to fill in information later), you could insert <Index On I><Index Off I>.

★ TIP: If these items appear frequently in your transcripts, and you don’t want to have to remember to insert <Index On Q><Index Off Q> or <Index On I><Index Off I> with separate keystrokes. This string of format symbols can more easily be inserted via an EZ Text entry, Personal Global or a Macro.

E. Index Headings

You already understand the concept of the <Index On> and <Index Off> format symbols: that you can surround any item that appears in your transcript text with a set of <Index On> and <Index Off> format symbols and then the Build Index command will copy the text between those format symbols, paste it into the appropriate spot on an Index page and generate a page number for that information.

You also understand how to combine a letter or number with F4 I and F4 i to designate the category for that indexed information, e.g. A for examinations, B for exhibits, C for certified questions, etc.

Now, suppose you have two related pieces of information to index instead of just one. For example, in some transcripts, you may want each witness’s name as well as the name of the attorney conducting an examination or the type of examination. In some transcripts, in addition to the exhibit number, you may want a description of the exhibit.

Whenever there are two pieces of information to be referenced with a single page number, you will use <Index Heading On> (F4 J) and <Index Heading Off> (F4 j) format symbols as well as <Index On> and <Index Off> format symbols. The Index Heading format symbols will surround the first piece of information, and the Index format symbols will surround the second piece of information. You will use the same category letter/number for both the Index Heading and Index symbols.

For example, suppose you want the following format on your index page:

<table>
<thead>
<tr>
<th>WITNESS</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>JIM BOROWSKI</td>
<td></td>
</tr>
<tr>
<td>BY MR. BAKER</td>
<td>4</td>
</tr>
<tr>
<td>BY MR. KIM</td>
<td>27</td>
</tr>
</tbody>
</table>

| MIGUEL RAMIREZ    |      |
| BY MR. BAKER      | 35   |
| BY MR. KIM        | 46   |
In the job, let’s suppose you have the witness’s name in the oath or sworn statement, followed by a series of examinations. As each new witness appears, a new oath/sworn statement is included and is followed by additional examinations.

You would surround the witness’s name in the oath/sworn statement with <Index Heading On A> and <Index Heading Off A> format symbols. You would surround the BY MR. BAKER and BY MR. KIM with <Index On A> and <Index Off A> symbols.

In the Index Template, you would insert a table with two columns and two rows. In the first cell of the first row, you would insert <Index Heading On A>. That would copy the witness’s name into that cell. In the second cell of the first row, there would be nothing -- no text, no format symbols. In the first cell of the second row, you would insert a <Tab> format symbol followed by the <Index On A> symbol. This would copy the byline information into that cell and indent it one tab setting. In the second cell of the second row, you would insert the <Index Page> format symbol (and right align it, via Modify Current Paragraph, if desired).

<table>
<thead>
<tr>
<th>INDEX</th>
</tr>
</thead>
<tbody>
<tr>
<td>WITNESS</td>
</tr>
<tr>
<td>&lt;Index Heading On A&gt;</td>
</tr>
<tr>
<td>&lt;Tab&gt;&lt;Index On A&gt;</td>
</tr>
</tbody>
</table>

(Note: The page number is generated for the <Index On> format symbols only; not for the <Index Heading On> symbols.)

Let’s review another example. Suppose your exhibits should appear as follows on the index page:

<table>
<thead>
<tr>
<th>EXHIBITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
</tbody>
</table>

In the job, let’s suppose you had a parenthetical that looks something like this:

(Whereupon, Exhibit 2, Police Report dated 1-04-2005, was marked for identification.)

You would position the cursor before the exhibit number, mark it by pressing Shift + Right Arrow and press F4 J B. This would insert the <Index Heading On B> and <Index Heading Off B> format symbol around the exhibit number. Next, you would position the cursor at the beginning of the description; mark it by pressing Shift + Right Arrow until the entire description was marked, and then press F4 I B to surround the description with <Index On B> and <Index Off B> format symbols.

In the Index Template, you would insert a table with three columns and one row. In the first cell, you would insert <Index Heading On B>. That would copy the exhibit number into that cell. In the second cell, you would insert the <Index On B> symbol. In the third cell, you would insert the <Index Page> format symbol.
F. Multiple Page Number References on a Single Line

On some index pages, you may wish to generate multiple page numbers in one table row. For example:

<table>
<thead>
<tr>
<th>WITNESS</th>
<th>DIRECT</th>
<th>CROSS</th>
<th>REDIRECT</th>
<th>RECROSS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jayne Crenshaw</td>
<td>4</td>
<td>17</td>
<td>24</td>
<td>28</td>
</tr>
</tbody>
</table>

To accomplish this, you will use the <Index Cell-n> format symbol (inserted by pressing F4 = and then a number) in both the Index Template and in the transcript text.

In the Index Template, rather than use the <Index Page> format symbol in each column where you want a page number, you will insert the <Index Cell-n> format symbol. After you press F4 = you will be prompted for a number, and you can enter a number from 1 to 20.

This number will correspond to the position in which the page number should be generated. For example, if you have four columns for page numbers, e.g. one for Direct, one for Cross, one for Redirect and one for Recross, you might use <Index Cell 1> in the table cell under Direct, <Index Cell 2> in the table cell under Cross, <Index Cell 3> in the table cell under Redirect, and <Index Cell 4> in the table cell under Recross.

In the transcript text, you will insert the <Index Cell n> format symbol surrounded by <Index On> and <Index Off> format symbols at the position of the item being referenced. For example, let’s say that the witness’s name appears in the oath/sworn statement surrounded by <Index Heading On A> and <Index Heading Off A> format symbols. When you insert (type, include or translate) the Direct Examination after that oath/sworn statement, rather than simply use the words DIRECT EXAMINATION, you would insert the following:

DIRECT <Index On A><Index Cell 1><Index Off A>EXAMINATION

When you insert (type, include or translate) the Cross-Examination, you would use:

CROSS-<Index On A><Index Cell 2><Index Off A>EXAMINATION

When you insert (type, include or translate) the Redirect Examination, you would use:

REDIRECT<Index On A><Index Cell 3><Index Off A>EXAMINATION

When you insert (type, include or translate) the Recross-Examination, you would use:

RECROSS-<Index On A><Index Cell 4><Index Off A>EXAMINATION

As with any other item that includes index format symbols, if you typically use a dictionary define to bring in this text, the <Index On>, <Index Cell> and <Index Off> format symbols should be a part of the text of that dictionary entry. If you typically use an Include File to bring in this
information, the <Index On>, <Index Cell> and <Index Off> format symbols should be a part of the text of that include file.

★ **TIP**: If you use EZ Text Table entries to insert this text, be sure to include the <Index On>, <Index Cell> and <Index Off> format symbols with that entry.

The <Index Cell n> format symbol can be used with either the <Index Heading On> format symbol or the <Index On> format symbol (but not with both).

For example, suppose you need to show both where an exhibit was marked/identified and where it was received/admitted, such as:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>MARKED</th>
<th>ADMITTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Letter dated November 5, 2004</td>
<td>34</td>
<td>101</td>
</tr>
<tr>
<td>2</td>
<td>Memo dated August 17, 2004 cc’d to all employees</td>
<td>59</td>
<td>99</td>
</tr>
</tbody>
</table>

Using the above example, when exhibit 1 is identified, you would surround the exhibit number, 1, with <Index Heading On B> and <Index Heading Off B> format symbols and also place the <Index Cell 1> format symbol between the <Index Heading On B> and <Index Heading Off B> symbols. When exhibit 2 is identified, you would surround the exhibit number, 2, with <Index Heading On B> and <Index Heading Off B> format symbols, again with <Index Cell 1> between the <Index Heading On B> and <Index Heading Off B> format symbols.

When exhibit 1 is admitted, you would surround the number 1 with <Index Heading On B> and <Index Heading Off B> format symbols with <Index Cell 2> format symbol between the <Index Heading On B> and <Index Heading Off B> format symbols.

Using <Index Cell n> format symbols with the <Index Heading On> and <Index Heading Off> format symbol will result in the reference numbers appearing on the correct line even if other <Index Heading On> and <Index Heading Off> format symbols appear between when exhibit 1 was identified and when exhibit 1 was admitted.

You will continue to put the <Index On> and <Index Off> format symbols around the exhibit description text when an exhibit is marked for identification, however you will not need to insert the <Index Cell n> format symbol with the description.

**G. Sorting Index Information**

Earlier, you learned that by using category letters in conjunction with your <Index Heading On> and <Index On> format symbols, you can group information that belongs together in separate sections on the page.

Within each of those sections, you may have occasion to sort that information further – in other words; change the order in which the information is presented. For example, rather than listing each witness chronologically, in the order that they testified; you may prefer to list the witnesses in alphabetical order, according to the last name of the witness.

To do this, you can use one of the Sort Index format symbols in the Index Template.

<Sort Index – Alpha Case Insensitive>
<Sort Index – Alpha Case Sensitive>
Suppose in my trial proceedings today, I had the testimony of three witnesses: ORLANDO SMITH on page 4, RITA ABRAMS on page 27, and JANET KOWALSKI on page 58. Let’s also say that those names were surrounded by <Index Heading On A> and <Index Heading Off A> format symbols.

When I use Build Index, if there is a <Sort Index – Alpha Case Insensitive> or <Sort Index – Alpha Case Sensitive> format symbol in the Index Template, the information would be presented with ABRAMS first, then KOWALSKI, then SMITH.

If there is no <Sort Index – Alpha Case Insensitive> or <Sort Index – Alpha Case Sensitive> format symbol, it would appear chronologically: SMITH, then ABRAMS, and then KOWALSKI.

To cause information to be sorted alphabetically, insert the <Sort Index – Alpha Case Insensitive> or <Sort Index – Alpha Case Sensitive> format symbol into the Index Template, immediately after the <Index Heading On> (or <Index On> if no heading is used) format symbol.

(*NOTE: There are no assigned shortcut keys for these format symbols; click the Format Symbol button on the toolbar or press Shift + F4, then scroll through the list of available symbols.*)

Case CATalyst will prompt you to indicate which word should be sorted. Your options are to sort on the First Word, Second Word, Third Word or Last Word. For example, if you were sorting witness names and you wish to sort via the witness’s last name, whether it is RITA ABRAMS or RITA LEE ABRAMS, you would select Last Word.

There may be occasions where you would prefer to sort based on a different word. For example, if you have the name RITA ABRAMS GOULD, you might prefer to sort based on ABRAMS rather than GOULD. Another example – suppose the witness’s name is SVEN VAN DEN TILLAAR. You might prefer to sort based on VAN rather than TILLAAR.

If that is the case, then in the transcript text, after the <Index Heading> format symbol, you will insert the <Sort Alpha Word – Override> format symbol and then select your preference (first word, second word, third word or last word). This will override the instruction in the Index Template for that one occurrence.

(*NOTE: You will use the <Sort Index – Alpha Case Sensitive> format symbol if the text surrounded by the Index Heading format symbols appears in different ways; e.g. all-capped, initial-capped and/or all uncapped, and you want to keep the occurrences of like cases together when sorting. You will use the <Sort Index – Alpha Case Insensitive> if the text surrounded by the Index Heading format symbols always appears in the same case and/or if you do not care whether all-capped and initial-capped text is sorted separately.*)

★ **TIP:** If you need to create both alphabetical AND chronological indexes, create two tables in your Index Template (or two separate Index Templates). One table should include the <Sort Index – Alpha Case Sensitive> or <Sort Index – Alpha Case Insensitive> format symbols. The other table should not use those symbols.

**<Sort Index – Numeric>**

If you need to have exhibits shown in order of the exhibit number rather than their chronological placement in the transcript text, you will insert the <Sort Index – Numeric> format symbol into your Index Template immediately after the <Index Heading On> or <Index On> format symbol.
For example, suppose that the attorney asked for Exhibit 12 to be marked for identification on page 4, then Exhibit 1 on page 17 and Exhibit 5 on page 26.

When Build Index creates the index page(s), if there is a <Sort Index – Numeric> in the Index Template, the information would be presented with Exhibit 1 first, then Exhibit 5, then Exhibit 12.

If the exhibits are labeled with letters as well as numbers, entries will be sorted by number in the order of numeric only (e.g. Exhibit 1) followed by numeric plus alphabetic (e.g. Exhibit 1a, Exhibit 1b). So if you have exhibit 1, 1a, 2, 2a, 2b, and 3, they will be sorted in that order (not as 1, 2, 3, 1a, 2a, 2b).

If no <Sort Index - Numeric> format symbol is present, the information would appear in the index in chronological order – the same order it appeared in the transcript.

When using these sort codes, they should be placed in the same table cell as the <Index Heading On> or <Index On> symbol of the text (or number) you want to have sorted. The <Sort Index> format symbol should be inserted immediately AFTER the <Index Heading On> or <Index On> symbol.

< Sort Index Alpha - Exhibit>

Some exhibits may be labeled with letters or double letters rather than numbers.

When the <Sort Index Alpha> format symbol is added immediately after the Index Heading On or Index On format symbol in an Index Template, an index built using that template, will cause entries to be sorted with single character exhibits first (Exhibit A, B, C, etc.), followed by double character exhibits (Exhibit AA, BB, CC, etc.).

This format symbol is also automatically case sensitive, so if there are exhibits labeled with both lower case and upper case entries, e.g. an Exhibit a and an Exhibit A, the sort automatically prioritizes the upper case letter entry followed by the lower case entry.

<Index End Sort>

On some occasions, you may need to sort both alphabetically AND chronologically.

For example, suppose you list witnesses alphabetically, followed by additional text, such as:

<table>
<thead>
<tr>
<th>WITNESS</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frank Gore – Witness</td>
<td>58</td>
</tr>
<tr>
<td>Frank Gore – Rebuttal Witness</td>
<td>113</td>
</tr>
<tr>
<td>Aaron Rodgers – Witness</td>
<td>24</td>
</tr>
<tr>
<td>Aaron Rodgers – Rebuttal Witness</td>
<td>65</td>
</tr>
</tbody>
</table>

In the Index Template, the <Index Heading On x> format symbol is followed by the <Sort Index Alpha Case Insensitive – Second Word> format symbol, to achieve alphabetical sorting of the witnesses by last name. (Of course, if one of the witnesses had a name like Mary Ellen Wyatt, in the job, the reporter would use the <Sort Index Alpha Word Override> format symbol to change the sort to the third word for that name.)

However, if only sorted alphabetically, Gore – Rebuttal Witness would come up before Gore – Witness, because “R” comes before “W.” Chronologically Mr. Gore testified as a witness BEFORE he testified as a rebuttal witness, and the requirement is to list the witnesses
alphabetically, but the examinations for each witness in the chronological order that they occurred for each witness.

To stop alphabetic sorting at a particular point and sort chronologically thereafter, you can use the <Index End Sort> symbol.

- Position the cursor where sorting should stop.
- Click the Format Symbol icon on the toolbar, or press Shift + F4.
- Double click the <Index End Sort> format symbol, or select it and then press Enter to insert.

H. Specify Case of Index Information

Some reporters may require the information that appears in the index to appear in a different case than it appeared in the transcript. For example, you might have <Index On> and <Index Off> symbols surrounding EXAMINATION BY MR. JONES in the transcript, and want it to appear as Examination By Mr. Jones on the index page.

In the Index Template, position your cursor in the cell where the information will be copied when the index is built. After the <Index Heading On> or <Index On> format symbol, insert one of the following format symbols:

<Index Allcap Cell>
When placed after an <Index Heading On> or <Index On> format symbol in a cell in an Index Template, the text in that cell will appear in all caps. *(This enables you to have text appear initial capped or all uncapped in transcript text, but all capped on the index page.)*

<Index Initial Cap Cell>
When placed after an <Index Heading On> or <Index On> format symbol in an Index Template, the text in that cell will be initial-capped; not all capped or all uncapped. *(This enables you to have text appear all uncapped or all capped in transcript text, but initial capped on the index page.)*

*(NOTE: Case CATalyst will use the Spell Check wordlists to determine if an all-capped word, e.g. an acronym, should remain all-capped or only be initial capped.)*

★ TIP: If you do not want the word “By” to be initial-capped when appearing in the middle of a phrase such as “Examination by Mr. Jones,” while in Edit, click Tools, Options, Advanced Edit. At “Words to suppress capping when found in middle of phrase”, click the Browse button at the end of that line on the right side of the dialog. In the Capitalization dialog, click the New icon and then type by and click OK (or press Enter).

I. Hidden Text

Sometimes, the information you want on the index page is not included in the transcript text. The most common example of this is the exhibit description. While some reporters will include an exhibit description in the parenthetical/blurb where the exhibit is marked or received, many reporters do not. For example, a typical exhibit parenthetical might appear as:
(Whereupon, Exhibit 2 was marked for identification.)

You can insert the exhibit description and surround it with <Index On> and <Index Off> symbols in a Hidden Text/Comment.

1. As described earlier, surround the exhibit number with <Index Heading On B> and <Index Heading Off B> format symbols. *(Mark the exhibit number, then press F4 J B.)*

2. Position the cursor in the parenthetical AFTER the exhibit number.

3. Click Edit (or press Alt + e), Insert (or press i) Hidden Text/Comment (or press h).

4. Type the exhibit description. Press Ctrl + Shift + Home to mark the exhibit description. Press F4 I B to surround that text with <Index On B> and <Index Off B> format symbols.

   ★ TIP: If you frequently add hidden text for exhibit descriptions, you can record a macro to open a Hidden Text/Comment, insert the appropriate Index On and Index Off format symbols and position your cursor after the Index On symbol so that you can type the exhibit description.

J. Make Exhibit Index Entries

Many reporters need to mark or admit several exhibits simultaneously but also want to reference each exhibit separately on their index page. For example, they will use one parenthetical on page 14 like: *(Exhibits 1-3 and 7 were marked for identification)* in the transcript text, and want to generate three separate rows for the exhibits on their index page:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Marked</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>document</td>
<td>14</td>
</tr>
<tr>
<td>2</td>
<td>photograph</td>
<td>14</td>
</tr>
<tr>
<td>3</td>
<td>diagram</td>
<td>14</td>
</tr>
<tr>
<td>7</td>
<td>letter, dated 1/31/08</td>
<td>14</td>
</tr>
</tbody>
</table>

To do this:

1. When editing the job, with the cursor positioned in the parenthetical where the exhibits are marked, click Edit (or press Alt + e), Insert (or press i), Make Exhibit Index Entries (or press m).

   ★ TIP: The “Make Exhibit Index Entries” function can be assigned to a key in your keyboard map.

2. At Exhibit range, type the range of exhibit numbers and/or letters. You will enter the exhibit range in a similar way as you enter page numbers for print. Let’s say you want to enter exhibits 1 through 4, 7 and 10. The Exhibit Range would be 1-4,7,10. Let’s say you want to enter exhibits A, B, C and D – the exhibit range would be A-D. Let’s say you want to enter exhibits P1 through P7; the exhibit range would be P1-P7.

   *(NOTE: If you use a hyphen between an exhibit number and letter; e.g. Exhibits P-1 through P-7 or 1-D through 12-D, you must surround the “number hyphen letter” or “letter hyphen number”*
range with quotes. For example, “P-1”-“P-7” or ‘I-D’-’12-D.’ You can use single quotes or double quotes, but you must use the same symbol before and after.)

You can also enter individual exhibit numbers/letters in any order you prefer (e.g. A, 29, F, B-3, 17).

If Case CATalyst is not able to determine the range criteria based on what you type in the Exhibit Range field, you will receive the message: “The range is not understood.” Click OK and cursor focus is returned to the Make Exhibit Index Entries dialog. You can then enter a different value for the range or enter the information for exhibits individually.

3. At Index Category, type the letter or number used for these exhibits. For example, if you use <Index Heading on B> and <Index On B> for exhibit-related information in your index template, you would type B.

4. At Use Indexing Format Symbols, select whether you use Index Heading format symbols only, Index Heading and Index format symbols or Index format symbols for building the index.

5. At Use Index Cell, if you are using <Index Page> to generate the page number for the referenced index, select Not using cells. If you are using <Index Cell #> format symbols to generate the page number(s) for each exhibit, then select For Index Heading, Use Index Cell(s) if you want the <Index Cell #> format symbol included between the Index Heading On/Off format symbols. If you want the <Index Cell #> format symbol included between the Index On/Off format symbols, select For Index, Use Index Cells.

In the field in the first column next to this option, type the Index Cell number that should be used. For example, if you use <Index Cell 1> when the exhibit is marked for identification, and you are currently entering information for a group of exhibits being marked for identification, you would type the number 1 in the field in first column next to this option. If you use <Index Cell 2> when the exhibit is admitted/received into evidence, and you are currently entering information for a group of exhibits being received into evidence, you would type 2 in the field in the first column next to this option.

Some reporters will have a parenthetical where they are performing two functions with one parenthetical – e.g. (Exhibits 1-15 were marked for identification and received into evidence). If that is the case and you need to generate two page number references, then you would type the first Index Cell number in the field in the first column next to this option, and the second Index Cell number in the field in the second column next to this option.

★ TIP: You can review how the index format symbols will appear in the Sample Text area of the dialog.

6. At “I want to customize Index Heading text,” select the option if you wish to be able to add text to the numbers and/or letters that you entered for the exhibit range.

7. At “I want to add description text” select the option if you want to type a description that will be inserted into a hidden text/comment.

8. Click OK (or press Enter).
9. Assuming you selected either “I want to customize Index Heading text” and/or “I want to add description text,” the Enter Detail (Exhibit #) dialog box displays. (The number and/or letter(s) of the exhibit will be shown in the title bar of the dialog box.)

If you selected to customize Index Heading Text, the cursor defaults to this field and you can either change or add to the current Index Heading Text.

The cursor defaults to the Index Text field for the description if you do not select the “I want to customize Index Heading Text” option. Go ahead and type the desired exhibit description into the Index Text field.

★ TIP: If you have previously copied the exhibit description to the clipboard, you can press F11 and the number of that item in the clipboard to paste the exhibit description into the Index Text field.

When entering text for exhibit descriptions, there may be occasions when all description text is the same. For example, suppose you’re marking exhibits 1, 2 and 3 and all of them are photographs, and each should be described on the index page as “photograph.”

Rather than type photograph each time for each exhibit, or use copy and paste, you can simply check the “Repeat description for all remaining entries” option and then click Next or Done. Each of the remaining exhibits will have the same description.

If typing (or pasting) separate exhibit descriptions, when the Index Heading Text and Index Text are correct for the first exhibit, click Next and enter information about the next exhibit.

(NOTE: A Back button will appear as soon as you begin entering detail for the second exhibit, enabling you to move backward to the text entered for the previous exhibit.)

10. Repeat as needed. You can click Next or Done when finished with the last exhibit description.

(NOTE: If you click Done before entering the correct information (Index Heading Text and/or descriptions) of all Index Heading Text and Index Text for each exhibit, you will receive a warning dialog asking if you wish to enter the remaining exhibits without descriptions.

If you click Yes, the index format symbols will be generated within a Hidden Text/Comment, and you will need to type in the exhibit descriptions (and/or any modifications to Index Heading text) later, either inside the Hidden Text, or after building the index, on the Index page.

If you click No, only the text you have typed thus far will be generated with index format symbols in a Hidden Text Comment.

If you click Cancel, you will return to the Enter Detail dialog box.)

★ TIP: Although the Make Exhibit Index Entry feature was designed for entering multiple exhibits, it can also be used to insert index information for individual exhibits.
K. <Index Placeholders Text #>

Some reporters have identifier “names” for exhibits (e.g. Plaintiff’s, Defendant’s, State’s, etc.) and list each named exhibit in a separate table, (e.g. all plaintiff’s exhibits in one table, then all defendant’s exhibits in a different table).

Some reporters using Build Index will either use multiple exhibit blurbs with separate index on/off format symbols, or a single exhibit blurb with conflicts for the “names” and conflicts for the index on codes.

Another option is to use a single exhibit blurb without needing conflicts. The reporter can assign text (names) and index categories to a list of Index Placeholder Text format symbols, and then use an Index Placeholder Text # format symbol. When the reporter or scopist selects the correct Placeholder Text number, they select both the “name” and the associated index category.

1. Modify/set up the Index Placeholder Text choices and index category assignments:
   - From Manage Jobs select Tools, Options, Edit, Advanced Edit (or press Alt+t, o, e, a). From Edit select Tools, Options, Advanced Edit.
   - Scroll down to the Index Placeholder Assignments section.
   - Click the [+] next to Placeholder Index 1.
     - Set the index category. Click the down arrow at the end of Placeholder Index 1 field, and then select the category letter you will use for Placeholder Index 1, or select (None) if you do not use automatic indexing, or wish to select an index category letter at another time.
     - For example, suppose the first category of exhibits you mark is Plaintiff’s exhibits and you typically use Index Heading On B and Index On B with Plaintiff’s exhibits; you would select B.
     - Next, identify the text for the placeholder. Double click the blank area next to Placeholder Text 1 or click the Browse ([…]) button. The Enter Placeholder Text dialog box displays. Type the name of the placeholder text, e.g. Plaintiff’s.
       (NOTE: If the text you want requires a field, e.g. ![WITNESS LASTNAME] or format symbols (bold, font colors, etc., click the FS button to select the format symbol, or click the Insert Field button to insert a field.)
     - Click OK (or press Enter) to complete the entry.
   - Click the [+] next to Placeholder Index 2 and repeat the above steps to assign an index category letter and placeholder text.
   - Repeat the above steps for as many Placeholder Index Text items as you may need.
   - Click OK to save the changes to the Advanced Edit Options.

2. Create a new (or modify an existing) Exhibit blurb to include the Index Placeholder # format symbol (and, if desired, associated index on/off format symbols):
Do one of the following:

- Open the existing Exhibit include file.
- Open the dictionary entry for your Exhibit blurb text.
- Create a new text file with the correct formatting and text for your exhibit blurb.

Position the cursor immediately before the word “Exhibit” and press `Shift + F4` to display the Format Symbol list. Move the cursor to **Index Placeholder #** and press **Enter**.

*(NOTE: Be sure there is one space between the Index Placeholder # format symbol and the word “Exhibit.”)*

If your parenthetical file already has index heading on/off and/or index on/off format symbols and you do not want/need to use the codes associated with the Index Placeholder skip to the next step.

If you do not have index heading on/off and/or index on/off format symbols in your parenthetical and you want to use the codes associated with the Index Placeholder, do the following:

- Position the cursor where an Index Heading On format symbol would go, if used, and **press F4 J #**.
  
  Then, position the cursor at the end of the text that will be copied to the index (after the exhibit number) and press **F4 j #** to insert the `<Index Heading Off #>` or **F4 j Spacebar** to insert the `<Index Heading Off All>` format symbol.

- Position your cursor where an Index On symbol would go, if used and press **F4 I #**. Then, position the cursor at the end of the text that will be copied to the index (e.g. after the description) and press **F4 i #** to insert the `<Index Off #>` or **F4 i Spacebar** to insert the `<Index Off All>` format symbol.

For example, let’s say your index includes the exhibit number and a description, and that you use Index Heading On/Off around the exhibit number and Index On/Off around the description.

**EXAMPLE:**

If your Index of Exhibits looks like this:

<table>
<thead>
<tr>
<th>NO.</th>
<th>DESCRIPTION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plaintiff’s Exhibit 1</td>
<td>photograph</td>
<td>14</td>
</tr>
<tr>
<td>Plaintiff’s Exhibit 2</td>
<td>document</td>
<td>20</td>
</tr>
<tr>
<td>Defendant’s Exhibit A</td>
<td>letter</td>
<td>52</td>
</tr>
</tbody>
</table>

Your exhibit blurb might look something like this:

```
<Parenthetical>(<Index Heading On #> <Index Placeholder Text #> Exhibit <Scanstop Begin>#<Scanstop End> <Index Heading Off All>,<Index On #> <Scanstop Begin>description<Scanstop End><Index Off #>, was marked for identification.)
```
If your Index of Exhibits looks like this:

<table>
<thead>
<tr>
<th></th>
<th>DESCRIPTION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLAINITF’S</td>
<td>photograph</td>
<td>14</td>
</tr>
<tr>
<td>2</td>
<td>document</td>
<td>20</td>
</tr>
<tr>
<td>DEFENDANT’S</td>
<td>letter</td>
<td>52</td>
</tr>
</tbody>
</table>

Your exhibit blurb might look something like this:

<Parenthetical>(<Index Placeholder Text #> Exhibit <Index Heading On #><Scanstop Begin>#<Scanstop End><Index Heading Off All>, <Index On #><Scanstop Begin>description<Scanstop End><Index Off #>, was marked for identification.)

- Save the changes to the Exhibit blurb.

3. To use the Exhibit blurb with the Index Placeholder # format symbol and associated Index On/Off format symbols:

- Include the Exhibit blurb into a transcript.

- Make sure your Scan For options have the Index Placeholders option selected.

Press F8 (or whatever key is assigned to Scan Forward or Scan Backward in your keyboard map). When CATalyst stops on the Index Placeholders format symbol, the Placeholder Text list displays.

<table>
<thead>
<tr>
<th>SC</th>
<th>Index</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>B</td>
<td>Plaintiff’s</td>
</tr>
<tr>
<td>2</td>
<td>C</td>
<td>Defendant’s</td>
</tr>
<tr>
<td>3</td>
<td>D</td>
<td>[[WITNESS LAST NAME]’s</td>
</tr>
</tbody>
</table>

- Select the desired text by pressing the number associated with the text you want or by double clicking an entry. The selected text replaces the Index Placeholder format symbol and the index category item, if applicable, replaces the Index Heading On # and/or Index On # format symbols, respectively.

★ TIP: The <Index Heading On #> and <Index Heading Off #> and <Index On #> and <Index Off #> format symbols can be inserted like any other symbol pair, by marking the text and then pressing the keys for the On symbol. For example, you could mark the index description text, then press F4 I # to insert <Index On #> and <Index Off #> around the description text.

★ TIP: You can have more than one text choice with the same letter in the Index Placeholder assignments in Advanced Edit Options. For example, if you use category letter “B” for either Plaintiff’s and/or Defendant’s exhibits within the same table, you could have Index Placeholder 1 assigned to B Plaintiff’s and Index Placeholder 2 assigned to B Defendant’s.
IX. Build Master Index

This feature enables you to build a “master” transcript index containing the index information from multiple transcripts. This option will most typically be used by official reporters who need to create one index for multiple volumes of trial transcripts.

There are two ways in which this information can appear: as a series of index pages with a set of index pages for each transcript listed consecutively, or (in Version 6.x or higher) as one index containing all of the data for each selected transcript.

Many reporters will create separate Index Templates; one for an individual transcript, and one for a Master Index.

To create a Master Index:

A. Open the file where you want the Master Index built. This may be within a transcript, or in a separate file.

B. Click Tools, Index, Build Master Index (or press Alt + t, n, e).

The left-hand column of the dialog box displays all the transcripts in the current user directory. You can select files to be indexed from the left hand column by clicking the check box next to the filename. These files are listed alphabetically.

The right-hand column of the dialog box displays the files selected to be included (generate data) for the Master Index.

If the file you have opened for the Master Index is inside a case, all the transcript files in that case are automatically selected and listed on the right side. The list of files on the right will be sorted by date with the earliest file listed first.

If the file you have opened for the Master Index is not inside a case, you will select the desired files by clicking the check box next to the filename in the left column. The files will be listed on the right in the order that you select them.

You can highlight a file name and use any of the following commands to change the order in which the files are listed:

- Move Up – move the selected file higher in the list. (The list indicates the order in which the master index will be built.)
- Move Down – move the selected file lower in the list.
- Remove – remove the selected file from the list and the Master Index will not use that file.
- Change Volume Info – if you use a unique Index Template for the Master Index, and you plan to build a series of index pages (one set for each selected transcript file) you may also choose to include an "Index Volume Description" at the beginning of each index section, to identify from which transcript the information has been generated.

To add this label, you would insert the <Index Volume Information> format symbol at the beginning of the Index Template to be used for the Master Index. Then, when building the Master Index, after selecting each of the files, you would click each file name, then click
Change Volume Info, and then type a label for that file’s index page information into the Index Volume Description dialog box. For example:

I
Vol. I
Volume I
Volume I – Testimony of James Doe
Volume I – 10/23/04

Another way to add the Index Volume Description to a transcript is to click **Tools, Index, Index Volume Description** (or press Alt + t, n, v) while editing the transcript. That information will be saved and used when building the Master Index.

- **Template** – Use the Browse button to select the desired index template for the Master Index. When you select Browse, CATalyst defaults to the Index Template case in the System Files case in the current user.

- **Combine Into One** – When this checkbox is selected, all of the index information from each selected transcript will be built into one index. When not selected, a separate index will be created for each selected transcript in the order that the transcripts are listed in the Build Master Index dialog box.

### X. Index Template Options

After selecting to use an Index Template, you will have the option to select any/all of three Index Template Options.

#### A. Ignore Index Information not used by Template

When this option is selected, it tells the Build Index or Build Master Index command not to include text that is surrounded by <Index Heading On> and <Index Heading Off> and/or <Index On> and <Index Off> format symbols in the transcript, but not used in the Index Template.

For example, in the Index Template used for individual transcripts, you might have tables for positioning information for examinations, exhibits marked/received, and certified questions. However, in the Master Index, you might only have tables for examinations and exhibits. If one of the jobs selected for the Master Index includes format symbols for certified questions, you would not want that information to be placed in the Master Index. Therefore, selecting Ignore Index Information not used by Template would cause the Master Index to be built without the certified question information.

#### B. Ignore Paragraph Formatting

If this option is selected, when Build Index or Build Master Index is used to build the index, it will not include any paragraph format symbols with the indexed text; even if those format symbols appear within the text surrounded by <Index Heading On> and <Index Heading Off> and/or <Index On> and <Index Off> format symbols.

For example, let's say you have the following string of text and format symbols in your transcript:
If Ignore Paragraph Formatting is selected, then the text would be copied to your index page as follows:

<table>
<thead>
<tr>
<th>EXAMINATIONS</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMINATION</td>
<td></td>
</tr>
<tr>
<td>BY MR. DOE</td>
<td>4</td>
</tr>
</tbody>
</table>

If Ignore Paragraph Formatting is not selected, then the text would be copied to your index page as follows:

<table>
<thead>
<tr>
<th>EXAMINATIONS</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMINATION</td>
<td></td>
</tr>
<tr>
<td>BY MR. DOE</td>
<td>4</td>
</tr>
</tbody>
</table>

C. **Number Index Separately**

If you select the Number Index Separately option, when the index is built and inserted into the transcript, the index page numbering will begin with page number 1 (using whatever number formatting you have selected for the Index Template) and the transcript page numbering will be unaffected.

For example, suppose your Index Template uses the ![Page Number i, ii, iii…] field in the page number header or footer, and you position the index pages immediately following your title and appearances pages but before a stipulations page. When you build the index and select the Number Index Separately option, the index is inserted following the Title (page 1) and Appearances (page 2) pages. The first page number of the index page is “i,” the next index page is number “ii,” etc. The Stipulation page that follows the index is numbered “page 3” (the same page number it was before you built the index).

D. **When using a master index template and <Index Cell> format symbols, select the format for the page info column:**

- <Index Volume Description> – <Index Cell>
- <Index Volume Description> – <Index Cell>

If you are building a master index containing information for multiple transcripts (volumes) and prefer for the Index Volume Description and a hyphen to automatically appear to the left of the page number generated by the <Index Cell> format symbol, select 

If you prefer that a hyphen does not appear between the <Index Volume Description> format symbol (inserted manually vs. generated automatically) and an <Index Cell> number, select <Index Cell>.

**XI. Creating Your Personal Index Page(s)**

You are now familiar with tools available to you to create an Index Template to match your own index page and to use Build Index to create your index page(s).

Use the following steps to help you put this information to work:
A. Organize the information.

1. Obtain a hard copy of a typical index page, one containing examples of all of the information that you generally put on an index page.

2. Determine how many categories of information are on that page, and label them with letters. For example, if you are creating a deposition index page that typically includes examinations, exhibits, questions instructed not to answer and information requested, you’d have four categories, and they might be labeled A, B, C and D. If you are creating an official/court index page, and you have opening statements, examinations, exhibits marked/offered, exhibits received/admitted, stipulations and closing arguments, you’d have six categories, and might label them A, B, C, D, E and F.

B. Surround text in dictionary entries or include files with the appropriate format symbols.

**Reminder:** If your examinations and/or by-lines should contain any index format symbols and you use the EZ Speakers Dictionary to build a case or job dictionary containing examinations and/or by lines, be sure to modify the entries in the EZ Speakers dictionary to include the Index format symbols.

Here are a few examples of possible EZ Speaker Dictionary entries containing index format symbols:

Steno: /KP-BGS/STKPWH
Text: <Centered Paragraph>EXAMINATION<By-Line><Index on A>BY
[EZ Speaker 00]<Index Off A>: (space)

Steno: /KP-BGS/STPHAO/STKPWH
Text: <Centered Paragraph>EXAMINATION<By-Line><Index on A>BY
[EZ Speaker 01]<Index Off A>: (space)

Steno: /KP-BGS/STKWAIO/STKPWH
Text: <Centered Paragraph>EXAMINATION<By-Line><Index on A>BY
[EZ Speaker 02]<Index Off A>: (space)

C. If you want the index pages to be built anywhere other than at the end of the transcript, insert the <Index Position> format symbol wherever the index page would typically appear.

For example, if you currently have a “TITLE” include file that contains your cover/caption page, appearances and the index, edit that include file. Delete the index portion and in its place, insert the <Index Position> format symbol.

D. Create your Index Template

★ **TIP:** Use the instructions in Sections V and VIII to build an Index Template, or use the Index Template Wizard. Instructions for using the Index Template Wizard are provided in the Index Template Wizard Self-Study Guide.

★ **TIP:** If some text is single spaced (e.g. an exhibit description), use F4 S to turn single spacing on, and F4 s to turn single spacing off.
 **TIP:** If there should be a blank line in between each item in the index, e.g.

<table>
<thead>
<tr>
<th>NO</th>
<th>DESCRIPTION</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Photograph of the defendant’s car, front view</td>
<td>14</td>
</tr>
<tr>
<td>2</td>
<td>Photograph of the defendant’s car, rear view</td>
<td>23</td>
</tr>
</tbody>
</table>

*Press Shift + Enter* to insert a `<New Line>` format symbol either at the beginning of each cell or after the `<Index On>` format symbol.

E. Test the process

In a sample job, insert examples of Examinations, Exhibits, etc., surrounded by the index format symbols used in your Index Template. Then, click Tools, Index, Build Index. Select Use Index Template, and then select your Index Template file. Click OK and build your index.

Check the results, and modify your template if/as needed.

 **TIP:** To remove an index created via build index, position the cursor in a table in the index and then click Tools, Index, Delete Index.

*When you use the Delete Index command, the `<Index Position>` format symbol will be positioned in the transcript at the point where the index was originally built (unless there is already an Index Position format symbol in the transcript).*

XII. Getting Help

If you would like individual assistance with setting up an Index Template and/or to arrange training to review these concepts, you can contact a Stenograph Certified Independent Training Agent to determine rates and availability at [www.stenograph.com](http://www.stenograph.com); then click **Training & Education**, then click **Find a trainer for in-person training** or **Find a trainer for remote/via Internet training**.