

# Indexing

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Indexing –  
all pain no gain?



# Generating entries

- Including details as subheads
- The main question is "If I was a reader,..."
- Metatopics
- Consistency
- Discriminate against passing references, repeated material
- Avoid annoying readers

# Phrasing entries

- Conciseness
- Key idea first
- Mirror terminology in the piece
- Plural vs. singular
- Consistency
- Nouns and gerunds
- Task orientation and gerunds
- Qualifying commands and special names for clarity
- Adjectives vs. whole concepts
- Avoid vague words

## More about phrasing

- Avoid initial prepositions
- Stick with two levels only

# Index Anatomy -- Main entries illustrated

fact, see measure

- filtering
  - data, 33
  - details, 33
  - individual records in the database, 34
  - prompts, 37
  - summaries, 34
- filters
  - adding, 34
  - cannot remove value subtitles, 50
  - combining, 35
  - model, 34
  - removing values as subtitle, 50
  - troubleshooting, 51
  - using values as subtitle, 27
- format
  - currency, 42
  - date, 42
  - default, 42
  - number, 42

Main  
entries



# Subentries illustrated

fact, see measure

filtering

- data, 33
- details, 33
- individual records in the database, 34
- prompts, 37
- summaries, 34

filters

- adding, 34
- cannot remove value subtitles, 50
- combining, 35
- model, 34
- removing values as subtitle, 50
- troubleshooting, 51
- using values as subtitle, 27

format

- currency, 42
- date, 42
- default, 42
- number, 42

XE: "filters:adding":

## Mark Index Entry

Index:

Main entry: filters

Subentry: adding

## Subentries

## Marker

Element Tag: <Unstructured>

Marker Type: Index

Marker Text:

filters:adding

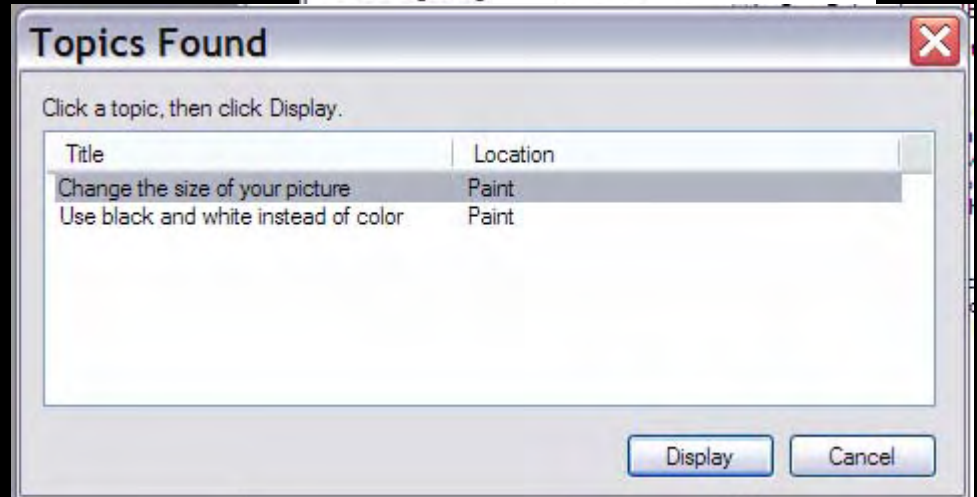
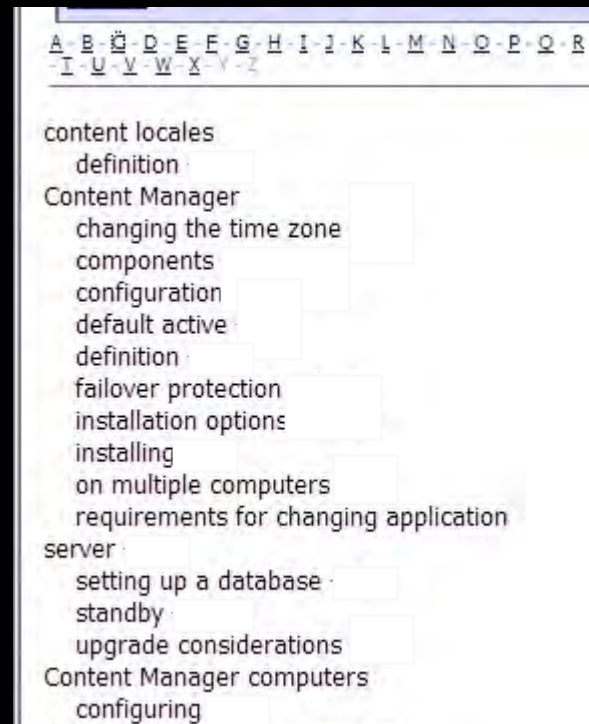
New Marker

# Subentries

- When are they needed
- More than three or four locators
- Topics that clearly break down into logical subtopics
- Divide the topic into useful logical partitions
- Create them at the same time as main entry
- Flip main and subentries with discretion
- Avoid creating many under the same head

# Locators illustrated

chart axes, swapping, [29](#)  
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    100% stacked, [61](#)  
    3D, [61](#)  
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    creating, [24](#)  
    downloading onto your computer, [25](#)  
    elements, [55](#)  
    example, [24](#)  
    removing, [24](#)  
    showing values, [24](#)



# Cross references

Online

database connection strings  
IBM DB2, [68](#), [75](#)  
Microsoft SQL Server, [69](#), [76](#), [194](#)  
Oracle, [68](#), [75](#)  
database connections, *See* data source connections  
database connectivity

data store, *See* metric store  
database client  
  setting up for a content store  
  setting up for a logging database  
  setting up for a metric store  
database connection strings  
  IBM DB2  
  Microsoft SQL Server  
  Oracle  
database connections, *See* data source connections

Print

authentication namespaces  
  deleting, [142](#)  
  trusted signon plug-in for Cognos Series 7, [128](#)  
  using, [121](#)  
*See also* namespaces

authentication namespaces  
  deleting  
  trusted signon plug-in for Cognos Series  
  using  
*See also* namespaces

## See references

- Pointing to the preferred term
- Pointing to a correct or newer term
- Pointing from an acronym to a spell-out
- Pointing from general < > specific topics

# See references

## Print

database connection strings  
  IBM DB2, [68](#), [75](#)  
  Microsoft SQL Server, [69](#), [76](#), [194](#)  
  Oracle, [68](#), [75](#)  
database connections, *See* data source connections  
database connectivity

## Online

data store, *See* metric store  
database client  
  setting up for a content store  
  setting up for a logging database  
  setting up for a metric store  
database connection strings  
  IBM DB2  
  Microsoft SQL Server  
  Oracle  
database connections, *See* data source connections

Online

## See also references

- Point the reader to related information listed under a different main entry
- Point the reader to new material, not duplicate content on different pages
- Point the reader from general to specific information
- The main entry has locators and at times subheads
- Must be specially coded

# See also references

## Print

authentication namespaces

deleting, [142](#)

trusted signon plug-in for Cognos Series 7, [128](#)

using, [121](#)

*See also* namespaces

## Online

authentication namespaces

deleting

trusted signon plug-in for Cognos Series

using

*See also* namespaces

# Multiple points of access/double-posting

- Listing under broad topic and specific topic
- Flip subentries and main entries
- List under two topics
- Cross-references

## Indexing into your files -- advantages?

Quicker time to publish

Updating for new editions

Converting print to online (single-sourcing)

Translation needs

Metadata advantages

## How do you embed?

- Insert codes in a document's electronic files
- Codes typed in or marked in a unique way
- Indexes generated by software's scanning of codes
- Codes are hidden for final output

# Examples of codes

Aperture provides adjustment controls to help you adjust the appearance of your images. You can make image adjustments using the Adjustments Inspector or the Adjustments palette.

This chapter provides basic information about making adjustments to images, including correcting color and adjusting exposure, levels, and white balance.

This chapter  
provides

all have strokes that rise above the letters' x-height. These are called ascenders. The letters g, j, p, and q all have strokes that go below the main element of the letter. These are descenders. XE "Ascenders" XE "Descenders" ¶

The bottom edge of the visual alignment of type is called the baseline. It's the invisible line on which type "sits." ¶

# Special codes

See -- In Frame:

<\$nopcode>data store,  
<Emphasis> See <default  
para font>metric store

In Word:

[[XE:"data-store":t:"See metric store"]]

**Mark Index Entry**

Index

Main entry: data store

Subentry:

Options

Cross-reference: See metric store

Current page

See also -- In Frame:

<\$nopcode>authentication  
namespaces:<Emphasis>  
See also <default para  
font>namespaces[authentic  
ation namespaces:zzz]

In Word:

[[XE:"authentication-namespaces":t:"See also namespaces"]]

**Mark Index Entry**

Index

Main entry: authentication r

Subentry:

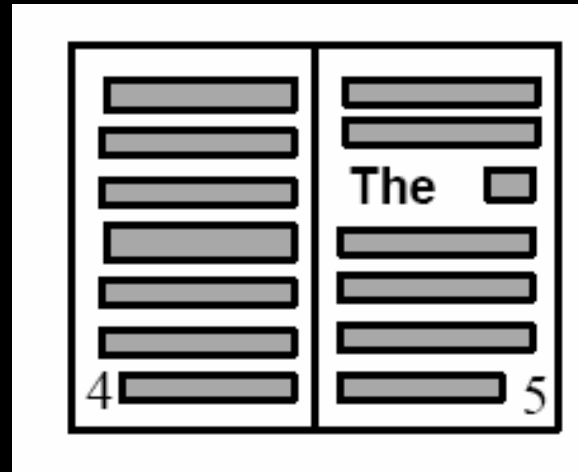
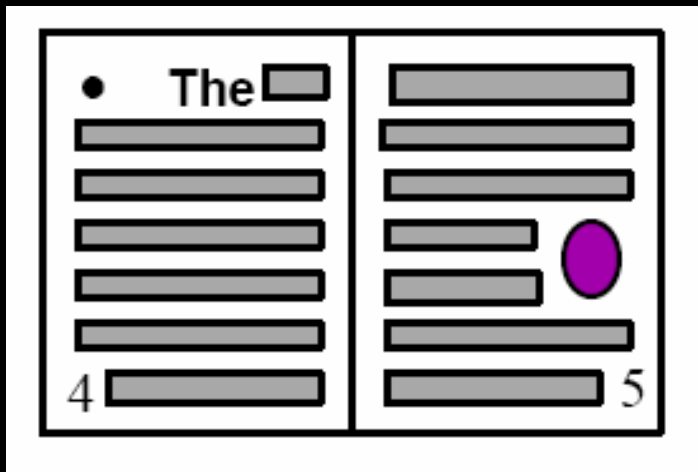
Options

Cross-reference: See also namespaces

Current page

# How it works

- Entries follow the text
- The index updates easily



# Word, Framemaker

- Entries
- See references
- See also
- Subentries
- Page ranging
- Sorting

Word



**Word**

# Frame



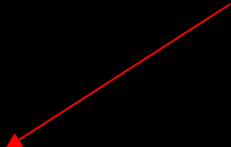
# The “Page Range” debate

- Should you add ranges?
- Single sourced materials
- XML-bound materials



# Stubheads

- Special locator that isn't differentiated
- Make your entries more visible online



columns, 13  
changing the order, 29  
renaming, 29  
reordering, 29  
sorting, 39  
swapping with rows, 29

# Translation and rewrite issues

- Placement of entries at end or beginning
- Avoid deletions
- Training writers
- Liberties?

A thousand years later hunters called Folsom, for an archeological site in northeastern New Mexico, tracked the now extinct *Bison antiquus* on the plains of Colorado. One of their hunting camps was located near modern-day Fort Collins, Colorado. Pikes Peak would have been an important navigational landmark for these nomadic hunters as they traveled along the mountains in search of game.¶

# Metadata and XML

- Thinking beyond pages as boundaries
- Thinking of content in chunks or “elements”
- Indexing flowing with content everywhere



# FrameMaker XML

- Structured document indexing



# Resources

- Emdex – [www.emdex.ca](http://www.emdex.ca)
- Frame – [www.adobe.com](http://www.adobe.com)
- InDesign – [www.adobe.com](http://www.adobe.com)
- IxGen – [www.fsatools.com](http://www.fsatools.com)
- Microsoft Word – [www.microsoft.com](http://www.microsoft.com)
- SonarActivate – [www.virginiasystems.com](http://www.virginiasystems.com)

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## **Index Planning Checklist:**

### ***Familiarity with text***

First, skim the material, study the TOC, look at the glossary

### ***Defining indexable material***

Then, decide which elements of the piece will not need indexing -- footnotes? Popup screens, credits pages? Will some information be indexing lightly, such as a long installation checklist?

### ***Level of coverage/exhaustivity***

Decide the level of coverage you will strive for -- the exhaustivity -- will you pick up every command and dialog box, or will you focus on tasks mainly?

### ***Size***

Is there a size limitation you must meet?

### ***Special elements/multiple indexes***

Are there any special elements that might require multiple indexes, such a commands index or a personal names index?

### ***Converting to other formats***

Will you be converting the files (and the indexing) to another format, say from print to WinHelp - this affects your format and levels choices.

### ***Company style***

Is there a company style you must follow?

### ***Time frame***

When will you start indexing -- how final will the content be?

### ***Tools***

What tool will you use for indexing -- standalone indexing software, embedded indexing modules in your software, a special addon or macro?

### ***Workgroup process issues***

How will you fit the indexing task into your group's process - when to begin, tool choice, conversion?

### ***Translation issues***

Will your index be translated with the piece?

## ***Structural issues in single-sourced indexes***

Levels available – one, two, three?

- One-to-one or one-to-many interface (multiple locators)
- Third levels work?
- “Topics Found” mechanism present?
- Multiple entry sets available (XML)?
- Pop-up pages available?

Cross references:

- Target names match perfectly or not?
- Sorting issues
- Interactivity – are they active?
- Limited to one reference or multiple?
- Generic references available
- Use ( ) to force sort?

Punctuation:

- Separator punctuation within entries
- Divider punctuation between lists of entries
- Internal punctuation within entries

Formatting

- Character formats such as italics, bold, or small caps available?
- Display of special characters
- Plural entries

Sorting

- Sorting of prepositions and lead stop words
- Sorting of special characters and numbers
- Sort of See Also's under S?

Stubheads

- Active or passive stubheads online?
- Double posting under stubheads

Other issues:

- Internal numbering systems in PDF display
- Conditional text handling
- Lost online entries from print page ranges
- Breaking long print spans into multiple online topics?
- Long strings of locators in print index
- Navigation in online indexes – type ahead or paged?

## **Items to consider indexing in manuals (with thanks to Lori Lathop)**

Broad topics

Specific topics or key terms

Proper names

Chapter headings and subheadings

Main product features

Main tasks

Main topics or chunks of information

Menu commands, dialog boxes, and tab names

Important concepts

Acronyms and abbreviations

Definitions or new terms

Field names

Functions, commands, parameters, methods

Screen names

Synonyms

Troubleshooting information

Warnings, error messages, or restrictions

## Resources

American Society of Indexers page	<a href="http://www.asindexing.org">http://www.asindexing.org</a>
Answerworks	<a href="http://www.wextech.com/pr4awoverview.htm">http://www.wextech.com/pr4awoverview.htm</a>
WebHelp/RoboHTML	<a href="http://www.adobe.com">http://www.adobe.com</a>
HTMLHelp	<a href="http://www.microsoft.com/workshop/c-frame.htm#/workshop/author/htmlhelp/hhapi.asp">http://www.microsoft.com/workshop/c-frame.htm#/workshop/author/htmlhelp/hhapi.asp</a>
HTML Indexer	<a href="http://www.brown-inc.com">http://www.brown-inc.com</a>
Indexing Research/Cindex	<a href="http://www.indexres.com">http://www.indexres.com</a>
IXGen	<a href="http://www.fsatools.com">http://www.fsatools.com</a>
LevTech	<a href="http://www.LevTechInc.com">http://www.LevTechInc.com</a>
Quicken	<a href="http://www.quicken.com">http://www.quicken.com</a> click on Site Index
Sageline	<a href="http://www.sageline.com">http://www.sageline.com</a>
Sky Index	<a href="http://www.sky-software.com">http://www.sky-software.com</a>
STC's Indexing SIG	<a href="http://www.stc.org/pics/indexing/">http://www.stc.org/pics/indexing/</a>
Winwriters page	<a href="http://www.winwriters.com/resource.htm">http://www.winwriters.com/resource.htm</a>

# Interested in Indexing?

The new UC Berkeley Extension Online indexing course (Indexing Theory and Application, X477) is taught completely online, and was developed by Sylvia Coates, with many other indexers contributing material. The course covers introductory materials and an overview of the indexing process, the creation of basic indexes, how to select terms, indexing specifications and how to deal with them, the business side of indexing, the development of your own workflow process, and an introduction to embedded indexing and web indexing. The challenging last indexing assignment, taking the place of a course final, allows students to practically apply what they have learned about the indexing process to create a professionally written index.

Students can enroll at any time, and have 6 months to complete the course. This means the course is self-paced, and fits your time frame. Indexing assignments are handed in via email, graded, and returned within a week. Exercises are returned to students within a day or two. The course contains three indexing assignments that gradually get more difficult and also expose the student to a variety of content. Students get reading assignments, research assignments, and exercises as well. Demo packages of the big three indexing programs (Macrex, Sky, and Cindex) are included, and the students must use each one, so that they get a real feel for how each software package works.

The course can be taken for credit, pass/fail or audit.

The course also allows for personal interaction with the instructors and with the other students in the course. The course materials and assignments are posted on the course

website, are easy to read, and contain further reading assignments, exercises, and indexes. The course also has a message board, with categories for discussion, and students can ask each other questions and read the instructor's responses to previous issues and thoughts.

The course is currently accepting enrollments in both sections on an alternating basis. The first section is taught by Sylvia Coates, the developer of the course. Sylvia has been a full-time indexer since 1989. Her indexing experience covers a wide variety of subject matter, including the social sciences, medical texts, business, religious studies, and women's studies. Sylvia regularly works for scholarly, textbook, and trade book presses. She has written numerous publications on indexing and has taught workshops and a basic indexing course since 1999.

The second section is taught by Jan Wright, M.L.S. Jan developed the web and embedded indexing portions of the course, and is an indexer, taxonomist, and controller of wild vocabularies who has operated her own business since 1991. She has extensive experience in software documentation and online systems, and has taught indexing and workshops for many years.

For more information, visit the Extension website at: <http://explore.berkeley.edu/UCExt/subdiscipline.asp?value=0.7.&action=Internet> or contact Sylvia Coates at [sylvia@sylvia.coates.com](mailto:sylvia@sylvia.coates.com) or Jan Wright at [janew@wrightinformation.com](mailto:janew@wrightinformation.com)

## Course Outline for X477 Indexing: Theory and Application

Unit 1: Introduction	Unit 6: The Business of Indexing
Unit 2: Creating a Basic Index	Unit 7: Developing Your Own Process and Style
Unit 3: Term Selection	Unit 8: Putting It All Together
Unit 4: Indexing Specifications	Unit 9: Embedded Indexing; Indexing a Web Site
Unit 5: Writing a Full-Length Index	

University of California  
EXTENSION ONLINE