

The Joy of Indexing: How to Make a Good Document Better

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An index is a road map for a document. A good index helps the user find information easily and quickly. It anticipates the user's needs and provides logical headings and a parallel, consistent structure. Creating an index involves five steps: 1) analyzing the audience; 2) determining the physical appearance and standards of the index; 3) reading and marking the text; 4) producing, editing, and proofing the index; and 5) testing the index for clarity and usability and revising it as necessary.

WHAT SHOULD YOU INDEX?

A good index indexes concepts; procedures; definitions; acronyms; abbreviations; symbols; restrictions; proper nouns; material in appendixes not covered in the text; pertinent notes, tables, charts, graphs, maps, drawings, and photographs; and references to other publications.

CREATING AN INDEX

Creating an index requires careful, systematic planning, execution, and testing. The reward, however, is the satisfaction of increasing a document's value and usefulness.

Step 1: Analyzing the Audience

To identify your audience's needs, interview a cross-section of your users and observe how they look up information. Then, based on your observations, identify the concepts and topics you will use in your main entries.

Step 2: Determining the Physical Appearance and Standards of the Index

After analyzing your audience, determine the number of levels, the standards, and the structure of your index and entries. The more care you take in this step the less time you will spend editing and proofing your index.

Step 3: Reading and Marking the Text

Using the information from the audience analysis, index each item you mark in at least two ways. For example, expand, modify, and invert the item so the

user has multiple access points. Also, restrict an entry to the four or five most important locations.

Step 4: Producing, Editing, and Proofing the Index

Editing and proofing an index can be very tedious. However, these tasks are essential to the usability and professional look of your index. Do not slight them even if fast approaching deadlines tempt you to do so.

Step 5: Testing the Index

Test your index for accuracy, completeness, and ease of use. Create a checklist for verifying the alphabetical order, spelling, capitalization, and topics and their page references. Ask yourself whether users can easily and quickly scan the index to find information. Finally, if you have time, perform a usability analysis with a sampling of your users.

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