

# Indexing

Exploring the Issues, Dispelling the Myths

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- What is an index?
- Meeting user expectations
- Who should create an index?
- When should you index?
- Tools for indexing
- Indexing online documents
- Editing an index

# Indexing: Issues and Myths

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## Myth

An index is the same as a table of contents or a concordance.

## Issues

- What an index is (and isn't)
- How an index is used

# Indexing: Issues and Myths

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## Myth

One navigational path satisfies the needs of all users.

## Issues

- Usability
- Cross-references and multiple navigation options

# Indexing: Issues and Myths

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## Myth

The writer is the best person to create an index.

## Issues

- Hazards of creating your own index
- Training in indexing methodology

# Writer as Indexer: Hazards

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- May be too close to the document
- May equate index with concordance or keyword search
- May not have time
- May not have software tools
- May see indexing as an onerous task
- May be too costly
- May be inexperienced in indexing methodology

# Indexing: Issues and Myths

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## Myth

The best time to index is while writing.

## Issues

- Differences between the two activities
- Dilution of efforts

# Indexing: Issues and Myths

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## Myth

You must have dedicated software (Cindex, Macrex, etc.) to create an index.

## Issues

- Other methods and tools available
- Tagged vs. untagged indexes

# Embedded Tags: Advantages

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- Tools readily available
- Page numbers assigned automatically
- Indexing can start before document is finished
- Revisions won't require manually fixing page numbers
- May only need to index once for electronic and print versions
- Authors can tag some entries on the fly
- Allows quick sub-indexes for specific chapters/page ranges

# Embedded Tags: Disadvantages

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- Hidden tags may be inadvertently deleted
- Limited formatting and alphabetizing options
- Page ranges may not be possible
- Indexing may take longer
- Compound locators may not be possible
- May not be able to see previously created entries
- When indexer is working in files, others can't
- Most embedded indexing programs create a separate file for the index itself

# Indexing: Issues and Myths

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## Myth

Automatic indexing tools will effortlessly create your index for you.

## Issues

- Learning to use the tool's options and settings
- *Starting point* only—lots more work to do

# Indexing: Issues and Myths

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## Myth

An index is superfluous in an online document due to search capabilities.

## Issues

- Portable Document Format (PDF) files
- Automatic online indexing tools
- Online search engines and <META> tags

# Search Example of Online Index

Search Criteria: flow measurement

Results from Search

Index (extract)

Air flow measurement <a href="#">H2T</a>	→	Air
Flow measurement, orifice plate <a href="#">DR22F</a>		:
Fluid flow measurement, selection guide		flow
<a href="#">DR20F</a>		:
Instruments flow measurement orifice		measurement <a href="#">H2T</a>
plate <a href="#">DR22F</a>		
Instruments flow measurement selection	→	Measurement
guide, general <a href="#">DR20F</a>		:
Measurement air flow <a href="#">H2T</a>		air flow <a href="#">H2T</a>
Measurement flow, orifice plate <a href="#">DR22F</a>		
Metering flow measurement, selection		
guide <a href="#">DR20F</a>		

# Indexing: Issues and Myths

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## Myth

The index is complete after the last entry is created.

## Issues

- Allow time for editing
- Who is the best person to edit the index?

# Editing Checklist

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## Key Areas

- Missing or circular references
- Consistency—parallel concepts for similar topics
- Clear and concise entries

# Editing Checklist

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## Substantive Edit

- Verify all: main entries, subentries, cross-references (no circular entries or indirect cross-references), double postings
- Check for inconsistencies

# Editing Checklist

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## Copyedit / Proof

- Spelling, punctuation, alphabetizing
- Accuracy of locators
- Parallel construction
- Formatting, typography, and conformance to style sheet

# Editing Index Entries

## Before

contractor safety 3-1.4  
  off-site 14-2.1  
  on-site 14-2.2  
reporting injury or illness 14-2.2  
responsibilities  
  contractor supervisor 14-2.3  
  DuPont administrator 14-2.4  
vendors 14-2.7  
contractors  
  injuries and illness 3-2.3  
  medical treatment 4-4.2  
  selecting 14-2.2  
  terminating contract 14-2.6

## After

contractors  
  **injury/illness 3-2.3, 4-4.2, 14-2.2**  
  **safety 3-1.4**  
    off-site 14-2.1  
    on-site 14-2.2  
  **responsibilities 14-2.3, 14-2.4**  
  vendors 14-2.7  
  selection 14-2.2  
  termination 14-2.6

# Editing Index Entries

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## Before

### lifting

NIOSH guidelines 5-5.2

techniques 5-5.2

techniques 7-2.4

weight limits 5-5.1

off-the-job injury 3-2.3

## After

lifting *see also ergonomics*

NIOSH guidelines 5-5.2

**techniques 5-5.2, 7-2.4**

weight limits 5-5.1

off-the-job injury **3-2.2, 3-2.3, 14-4.1**

**on-the-job injury *see Injury/Illness***

# Editing Index Entries

## Before

hand protection  
animals 10-7.2  
chemicals 10-7.2  
electricity 10-7.2  
general 10-7.1  
glassware 10-7.2  
mechanical materials 10-7.2  
specific hazards 10-7.3

## After

hand protection **see also gloves**  
animals 10-7.2  
chemicals **10-5.2, 10-7.2, 10-7.4, 20-11.10**  
**cuts/punctures 10-7.4**  
**dry heat 10-7.4**  
electricity 1-2.1, 10-7.2  
general **1-1.1, 10-7.1**  
glassware 10-7.2, 21-2.2  
laser radiation 21-7.4  
mechanical **equipment and** materials  
10-7.2  
specific hazards 10-7.3  
**wet heat/hot liquids 10-7.4**

# Editing Index Entries

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## Before

levels and work controls

below level 1 5-4.3

level 1 (low risk) 5-4.3

level 2 (mid risk) 5-4.3

level 3 (high risk) 5-4.4

after-hours security 9-2.1

escorts 9-2.3

security check, personal 9-2.2

## After

**levels and work controls 5-4.3**

**after-hours**

**escort 9-2.3**

**security 9-2.1**

**escorts 9-2.3**

**security**

**after hours 9-2.1**

**escort 9-2.3**

**personal check 9-2.2**



# How to Reach Us

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