Company technical indexing guidelines

by Jan Wright

Recently in my work, I have found myself explaining the "whys and wherefores" of indexes to software clients who have told me they want to know more about indexing. With a new documentation department, it helps to set into place indexing goals and standards, so that writers can develop consistent indexes. Existing departments should evaluate current indexing guides for usefulness, making sure the guide really represents company practices.

Indexing has to meet four separate standards: practices established by the American Society of Indexers, University of Chicago, and other authorities; a company's standard practices and translation needs; the needs of the users of the company's products; and the UI demands of the platform the indexing is for.

So what should your indexing guidelines cover?

Approach

Keep in mind that the indexer is the user's advocate. Users do not approach the material the same way a writer does. Most users approach the same material from a variety of different learning styles, and many never consult the Table of Contents at all. The index must serve the needs of a variety of access situations — learning, quick reference, browsing, etc.

What gets indexed

Make sure to include a section in your guidelines that outlines what information gets picked up. The glossary, callouts for screen captures, commands, dialog boxes, tools, features, and functionality are all potential targets. How will you phrase commands and dialog boxes? How will you capitalize them?

Functionality for a product should be indexed under as many access points as possible. This is known as double-posting, which is a slight misnomer. One concept usually gets more than two index entries — it often can have six or eight if it is a complex idea.

Special information

Set a standard for indexing file extensions, code samples, and other special information types. Will they be in small caps, no caps, or all caps, in italics or bolded?

Length

The depth of your piece should dictate the length of your index. Simple manuals can have indexes that measure about 5% of the total number of book pages. More complex topic pieces can range up to 10% indexes.

Number of levels

How many levels can the index go to? Online, the user interface often dictates this decision. In print, staying to two levels is best and least confusing for the user. Large manuals may have three levels to handle the detail.

Consistency within indexes

Outline how main entries should be phrased, the use of gerunds, and whether entries will be singular or plural. Adjectives should never be left standing alone as main heads — this is frowned upon very seriously in the indexing world.

Cross references

Set standards for *See* and *See also* references and how they should appear — italics, any special punctuation? Will you use generic cross references?

Sorting

I usually suggest that indexes be alphabetized word-by-word, with symbols and numbers as the first section. Treat hyphens and slashes as spaces.

Format and punctuation

You should set up a standard layout for every index, so that your company's pieces all look the same. Commas after main terms or two spaces? Run-in or indented? Main terms capitalized, or not? What does get capitalized no matter where it appears? Will you use divider letters?

Make it clear that commas and hyphens in page number locators mean two different things. A sequence of numbers separated by a comma means that the discussion is not continuous, but is broken up by other subjects. A hyphen indicates a continuous discussion.

Subheads in printed indexes should be indented about three characters. The font size should be about two sizes smaller than the body type of the book. Continued lines should be inserted for column and page breaks.

This is just a start on the kinds of items your group can include in its indexing guidelines. For more ideas on what to include, browse through Nancy Mulvany's *Indexing Books* (Univ. Of Chicago Press, 1994); *The Chicago Manual of Style, 14th Edition* (Univ. of Chicago Press, 1993); *Read Me First! A Style Guide for the Computer Industry*, Sun Technical Publications (Prentice Hall, 1997); Larry Bonura's *The Art of Indexing* (Wiley Technical Communication Library, 1994); or the *Microsoft Manual of Style for Technical Publications* (Microsoft Corporation, 1998).