Editing the index: developing a method

Hilary Faulkner and Wiebke M. Light

This article draws on an INDEX-L discussion about methods of index editing which developed from a query posted by a new indexer, who then reflects on her own developing method.

In a sentence which will be familiar to many readers of this journal, Henry B. Wheatley emphasizes the importance of editing in the process of creating an index:

When an indexer comes to the last page of a great book he rejoices to have finished his work; but he will find by experience, when he calculates the arrangement of his materials, that he has scarcely done more than half of what is before him.

(Wheatley, 1902, quoted in Mulvany, 1994: 214)

Ready availability of excellent indexing software has simplified the task of editing indexes but it still requires considerable intellectual input, creativity, accuracy and attention to detail from the indexer. For the trainee and newly qualified indexer, editing can represent a particularly daunting part of the process of creating an index. You have scoured the text, selected headings, subheadings, even sub-subheadings. Now, perhaps in your first full-length index, you are faced with the task of pulling it all into coherent shape, eliminating as many errors and infelicities as you can.

Ann Truesdale expressed the feeling this can provoke in a post to INDEX-L: ‘When I did my first few books, the first editing stage was always “panic!”.’ Ann was writing in response to a request from one of the authors of this paper (Wiebke Light) who, while in the process of editing her first full-length book index, asked INDEX-L list members about their individual editing methods. This article has been developed from the discussion that ensued, with the kind permission of all those who took part, together with sonsie Conroy, who expected to ‘take a hit or two here’ for writing that she does not check all locators. As the discussion progressed it became clear that none of the contributors did this – some contributors do spot checks, but most check locators as part of other editing tasks, such as checking double postings or cross-references. Christine Shuttleworth writes: ‘I don’t check all the locators either as a separate task – any errors usually seem to show up of their own accord at some point in the process.’ Several contributors stress that taking care during entry can help eliminate the need for tedious checking of locators.

The first response came from Sonsie Conroy, who expected to ‘take a hit or two here’ for writing that she does not check all locators. As the discussion progressed it became clear that none of the contributors did this – some contributors do spot checks, but most check locators as part of other editing tasks, such as checking double postings or cross-references. Christine Shuttleworth writes: ‘I don’t check all the locators either as a separate task – any errors usually seem to show up of their own accord at some point in the process.’ Several contributors stress that taking care during entry can help eliminate the need for tedious checking of locators.

Sonsie writes that her first editing task is to scroll through the index, ‘reading carefully for meaning/context/organization’. Ann Truesdale starts with a ‘quick pass’ to eliminate simpler problems before another pass ‘to resolve the major organizational issues and [check] double-postings’. Ann points out that this is not a linear process, as she will move around within the index cross-checking and reconciling entries. Sharon Hughes starts by viewing the index in unsorted (as entered) view, which allows her to spot
The Indexer

husband so he can take a fresh look and find those odd
indexers also like to set the index aside for a day before
of the index, but others are left for the final edit. Some
utors. Some of these will be resolved during the construction
degree’. Maureen MacGlashan, on the other hand, does
which would slow down the process to an unbearable
indexes often include a lot of unfamiliar names or terms
writes that she rarely spell-checks because, like Sonsie's, ‘my
spell-checks into her final edit. Christine Shuttleworth
spell-check each day, while Rachel Rice incorporates several
mention spell-checking, as does Pam Rider, who runs a
check 'which is generally useless for the kind of indexing I do
features.
Maureen MacGlashan comments on her reliance on the
grouping and Boolean grouping functions in MACREX, a
sentiment echoed by other MACREX users and by SKY
users. None of the self-selected contributors reported
using CIINDEX, which also has a range of useful editing
features.

Attitudes to spell-checking are varied. Sonsie Conroy
likes to check the spelling of difficult words and names as
she makes the initial entry, but will check again as part of the
final edit. She imports the index into Word to do a spell-
check ‘which is generally useless for the kind of indexing I do
(which contains a huge number of foreign names and terms),
but will catch the embarrassing misspelling of common words’. Sharon Hughes and Audrey Dorsch also
mention spell-checking, as does Pam Rider, who runs a
spell-check each day, while Rachel Rice incorporates several
spell-checks into her final edit. Christine Shuttleworth
writes that she rarely spell-checks because, like Sonsie's, ‘my
indexes often include a lot of unfamiliar names or terms
which would slow down the process to an unbearable
degree’. Maureen MacGlashan, on the other hand, does
does spell-check ‘even though my indexes are full of foreign and
unusual words, and are sometimes very long. Tedium, but I
find it pays well.’

Keeping a list of notes and queries, either handwritten or
in a computer file, is a practice referred to by most contrib-
utors. Some of these will be resolved during the construction
of the index, but others are left for the final edit. Some
indexers also like to set the index aside for a day before
giving it a final review. Sharon Hughes gives the index to her
husband ‘so he can take a fresh look and find those odd
inconsistencies and plainly stupid entries’.

Looking back at the accounts by Barbara Britton and Jean
Simpkins in the Society of Indexers’ training course (in Booth
and Piggott, 1995: 19–20), it is apparent that the development
of dedicated indexing software has made a tremendous
difference to the process of editing indexes, as we suggested
above. Jean Simpkins writes that, at the start of editing; ‘one
is half-way through the job’ (p. 20). Now the final edit seems
to represent 25 per cent or less of the work of creating an
index. Far more can now be done while compiling the index,
and the error-check functions can greatly reduce the need for
manual checking, flagging up such items as orphaned
subheadings and page numbers out of range.

It appears from the INDEX-L discussion that some
elements of editing have been virtually eliminated – for
example, no one mentions checking for alphabetical or
other appropriate order, although presumably indexers still
do this where there is a particular need, perhaps in lists of
pharmaceutical names, and Sonsie Conroy mentions re-
alphabetizing if changes following a spell-check necessitate
it. Checking punctuation is also not mentioned. Both of
these can perhaps be taken for granted with experience –
less experienced indexers need to learn to remember to set
the software to produce the index in the desired format!
Having said that, Sharon Hughes does ‘recheck that I have
the format that the editor wanted’, which implies a check on
punctuation and layout.

Reading through these contributions was fascinating and
helpful to both of us as new indexers, and serves to emphasize
how valuable it is to be able to call upon the experience
and expertise of our colleagues when we feel we are floundering.

To round off this article Wiebke spent some time
reflecting on how her index editing has developed in the few
months since she made her original request to INDEX-L.

How my editing has developed

I began indexing professionally less than a year ago, after
completing a course with Kari Kells in Olympia. I experi-
enced frustration sooner than expected during the editing
stage of my first real indexing project. After the initial pass
through this highly scholarly book, I was left with an expan-
size index of over 1,800 entries, including countless
subentries. It was at that point that I sent an email (or rather
an outcry for help) to INDEX-L, hoping to get some sound
advice about how established indexers proceed with editing.
Incorporating the online advice together with my intuition, I
began jumping from entry to entry – grouping terms that
‘magically’ came to mind, all the while light years away from
those final Z-entries.

After that experience, I read Do Mi Stauber’s Facing the
text and I have benefited greatly from her highly organized
approach to indexing and editing. I now try to incorporate
aspects of editing into the data entry stage. I mark the
entries during my first pass, but never wait longer than a few
pages before I enter the terms into the software. This allows
me to remember the context well, and establish connections
between previously gathered entries and new concepts. My
wording gets streamlined and I avoid creating multiple
topics of similar content.
When I begin the editing stage, I feel somewhat secure that the index I created is solid. Nevertheless I find myself spending hours editing its initial structure and content. Editing indexes for me consists of five main elements: comparing locators in double-posted entries, checking and creating cross-references, consolidating or expanding sub-entries, merging related entries, and refining my wording. I proceed alphabetically and work my way through to the end of the index. When I get to an entry that is momentarily too complex, I write it down on a list of terms that I plan to tackle at the very end. As a result, I find the most crucial and difficult entries waiting for me after my first pass through the index.

Dedicated software helps significantly with editing. In order to check double posts and cross-references I often resort to a ‘grouping’ function. When comparing similarly alphabetized words, I view the index in a ‘sorted’ arrangement. Verifying the locators and entries of particular pages, I choose the ‘page ordered’ view of the index. The ‘find and replace’ command assists with locating terms that require change throughout the entire document.

After completing this intense editing stage, I reward myself with easier tasks such as removing duplicate records, locating errors with the help of my software functions and running a spell-check. At this time, I will occasionally go back to the text and verify locators. I then print out the index for the first time and review the hard copy. Viewing the index on paper helps me uncover additional errors, inconsistencies and elements that require revision. I view this stage as my opportunity to make the index visually and verbally smooth.

How do I know when the index is complete? I don’t! It seems that there is always wording that can be made more precise and little details that can be tinkered with, but there is a deadline that needs to be met. I still don’t think I have found the perfect editing system, and I am glad to take advice from those who have many years of experience. In fact, at this year’s American Society of Indexers conference in Pasadena, my conference buddy Lucie Haskins suggested I incorporate the main editing procedures into the data entry stage. She promised it will save time and be very efficient. I will give it a try with my next index!

References

Acknowledgements
Thank you to everyone who agreed to allow us to use their INDEX-L contributions in this article. We hope we have not misrepresented anyone.

Hilary Faulkner is a freelance indexer and a PhD student in the Centre for Applied Social Research, University of Durham, UK.
Email: Hilary.Faulkner@btinternet.com

Wiebke M. Light is a freelance indexer with a strong academic background in art history, history, Judaic studies and German language.
Email: wiebkelight@juno.com; website: www.lightindexing.com