Editing the index: developing a method

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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.
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> (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 Wiebke's reflections, a few months later, on her own development in this aspect of indexing. The article also reflects an interest on the part of the first author in the use of indexing software and methods in the interpretation of data.

Training in indexing covers the editing process, as do standard indexing textbooks such as Mulvany (1994), or more recently Stauber (2004). Mulvany provides a useful checklist and guide to elements of the editing process (pp. 215–26). Stauber gives a more reflexive and personal account with examples from her own career (pp. 317–23). Both writers point out that editing is a process that goes on throughout the creation of the index. There are also workshops available, such as those offered in the UK by Ann Hudson and reviewed by Henderson (2003). However, like training courses in indexing, these are just a beginning, and it is through a mix of practice and seeking the advice and opinions of indexers at varying levels of experience that new indexers develop both competence and confidence in editing their indexes.

The original enquiry to INDEX-L produced 11 responses of differing lengths from nine contributors, which were analysed by Hilary. In order to identify themes and areas of both commonality and difference in the texts she used qualitative data analysis methods. Rather than using one of the standard software packages available for this such as NVivo, she chose to use SKY Index software. Each contribution was given an identification number, and this number was used as the locator in our 'index'. Hilary 'indexed' in a somewhat unconventional fashion as the aim was to interpret and summarize rather than analyse and signpost the text. Main headings were aspects of the indexing process mentioned in each posting; subheadings indicated where more detail was given, or gave other qualification. The document produced could stop the heart of any indexer – overlong headings, orphaned subheadings, apparently nonsensical entries – but it gave a detailed qualitative and quantifiable summary of the content of the postings so that she knew how many and which contributors had referred to which different aspects of editing. An extract is reproduced below:

```
don't check all locators 2, 4, 6, 8
don't spell-check 6
edit subheads
    5 locator max inc locators 4
    inc locators 5
edit while indexing 2, 6, 10, 12
entry order 7
```

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

anomalies in the sequencing of locators; other contributors also make use of this facility.

Christine Shuttleworth remarks upon the 'assumption . . . that editing is largely done on screen'; she likes to print out a draft when she has finished working through the text, and take a break from the computer to look through this in another room, making notes and changes by hand. Ann Truesdale demonstrates how personal editing techniques develop over time and with experience as each indexer finds what suits them best when she writes that 'Early on I did a great deal of editing on paper. . . . Unfortunately, I've found that to be much slower than working on screen.' Most of the contributors print out a draft for final checking at the end of editing although Rachel Rice also likes to use a printout earlier in the process: 'While I do most of the editing on screen, I find that I can do a better job with a printout. I have no idea why but I can just see things better somehow. I always find a ton of stuff on a printout that I didn't see on screen.' Pam Rider likes to print out a hard copy as 'the first step in my final edit'.

Rachel Rice's first step is to 'go through and kill off any subentries where there aren't enough. "Enough" varies from index to index.' Several contributors comment on the usefulness of grouping functions in indexing software for such things as checking subheadings, allowing easy comparison for consistency in construction and inversion. They are also used for checking that double postings match and that correct links are made between related items. 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 CINDEX, 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 spell-check 'even though my indexes are full of foreign and unusual words, and are sometimes very long. Tedious, 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 contributors. 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 experienced 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 expansive 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 will 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!

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Acknowledgements

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