

# A to Z • The Newsletter of STC's Indexing SIG

**STC** society for technical communication

Vol. 2, No. 1: January, 1999

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## From The Editor:

It's exciting to be able to present Beth Hamilton's article on online help indexing. This is a subject that many of you are interested in, as more and more information goes online, and this article is a good introduction to the issues involved.

Peg Mauer has taken over the Q & A section, and has a selection of FrameMaker indexing questions for you to ponder, and perhaps you have the answers to one thorny question.

Also be sure to check out the upcoming events. The WinWriters conference in February has some sessions on indexing that may make it worthwhile to brave the winter rainstorms of Seattle. I know the rest of you are facing snow and ice, but here it is mudslides, floods, and puddles. Be sure to bring your umbrella if you come to WinWriters.

Special thanks to Linda Metzler for handling the printing and mailing of this issue! You are the greatest!

May your indexes always compile!

Jan C. Wright

by Beth Hamilton

## Indexing Online Help

In order to make a help system really helpful, you need to provide an effective index. But many online help writers face two dilemmas when it's time to index their help systems: How to prepare a useful index that meets the users' needs and how to code the keywords to make the index compile correctly. This article provides tips to help writers solve both problems.

### It *Is* Indexing!

The first thing to consider when you begin coding keywords for an online help file is that you are preparing an index. That sounds obvious, but it's easy to get so bogged down in the mechanics of coding the help file and keywords that you overlook the purpose of the index. One of the biggest complaints of help users is that they cannot find the information they need.

But, you say, I know I put that information in there! But did you consider the user who has just switched from a competitor's product and is not yet accustomed to your terminology? Did you check to see what other terms the users might call it? Did you make sure the topic title is explicit enough that users can figure out which topic has the information they need? If they can't find the topic, it might as well not be there.

### ***But My Help File Has Full-Text Search!***

Although Windows 95 provides full-text search, you still need to provide alternate terms to help the users find information. Full-text search can only find the terms that are in the help file. If the user doesn't know the correct terminology, then full-text search won't find the information.

An index is *not* a list of the terms used in the help file. That's called a concordance, which is what many automated indexing programs create. Each of these mechanisms (concordance, full-text search, and index) is useful, but each accommodates different methods of information retrieval.

### Scheduling Issues

Okay, so I have convinced you that you need to prepare a thorough index for the help file. But how long will it take, and who should do it?

(Continued on Page 4)

According to Lori Lathrop,<sup>1</sup> you should schedule the same amount of time and effort for the index to a technical manual as you allow for each of the chapters. You can use this same parallel for online help. You probably divide the online help development tasks into categories when you estimate the time it will require. Choose a fairly average category, and allot the same amount of time to develop and edit the help index.

choose to use can make excellent index entries. They may also be in the best position to choose synonym and concept entries.

Having the writers add keywords also ensures there are keywords available for the development team's use as you begin editing the topics. Just as the end users need the keywords to find information, even an incomplete index can help you find the topic covering the window that just changed.

the project, but you gain the consistency of a single index editor. This is also a good method to choose if you are using an external or freelance indexer.

Whichever method you choose, it is important that one person look at the index as a whole. Inevitably, if you have multiple writers adding keywords, there will be minor inconsistencies in the wording. It's also important to have a fresh eye look at the keywords for completeness and accuracy, just like any other part of the help.

One thing that can help the process is to develop a keyword "style guide." This doesn't have to be fancy, but some quick guidelines and a list of suggested keywords can help.

### ***When Should You Edit the Index?***

If the writers have been entering keywords as they write the help topics, you can save the editing task until late in the editing cycle. The help topics should be relatively stable before you begin editing the index. After all, you don't want to do it all over again after the revisions are finished.

You should consider whether the help file will be evaluated during beta or usability testing. If it will, do at least a preliminary edit before testing. In fact, beta testing is a good time to find out if you have indexed the file well enough.

Be sure to allow plenty of time for editing the index. Boggan, Farkas, and Welinske recommend that you allow 10 percent of the total time allocated for developing the help file for editing the index.<sup>2</sup>

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### ***Who Should Do It?***

Who should develop and edit the index? You can choose one of these methods:

- Multiple indexers - All writers index their own topics.
- Single indexer - One person indexes the whole help system.
- Combination - Each writer adds keywords, but one person reviews keywords and edits the index.

There are advantages and disadvantages to each method.

First, let's discuss the multiple indexer method. Because the writers are the most familiar with the information, they can add keywords that another person may not consider. As they research and write the information, they choose the terminology that goes into each topic. Sometimes the terms they

Using a single indexer ensures consistency, but this must be managed carefully. First, an indexer who is adding keywords during the help development process must have ample access to the help source files. This can create conflicts if the writers are still working in the files. If the indexer is also responsible for writing help topics, the writing assignments must be balanced with the indexing responsibilities. During the writing and editing stages of the project, the indexer can work on both writing and indexing tasks. However, at the end of the project, the indexer will require dedicated time to edit the index.

The third method, a combination of the first two, is usually most effective. You have the advantages of the writers' knowledge of the topics and the use of the keywords during

## Choosing Keywords

Choosing the keywords for a topic is the most important part of developing the index. They determine whether the users quickly find what they need or give up, vowing never again to use the help index. There's no magic formula to decide what keywords to use, and the computer can't do it for you. You just have to think like a user.

At the very least, make sure you follow these guidelines:

- ➔ Index the key terms used in the topic.
- ➔ Make sure you can find all of the field descriptions by looking up the label on the screen. If the same field is labeled differently on various screens but you have only one topic, make sure you index that topic under each label.

- ➔ Include synonyms, especially for terms that are specific to your product. Users shouldn't have to know what you call something to find the information.
- ➔ Include entries for the general concepts discussed in the topic.
- ➔ If your customers have used competing products, try to find out what terminology your competitors use and include those terms as keywords.
- ➔ Check the appropriate trade journals to learn the jargon for your industry.

### ***Special Characters and Numbers***

You may also need to index special characters and numbers. However, this can present several issues you must consider. For example, all of the special characters and numbers will be at the beginning of the index, so you need to be aware of how many entries there are. It can

be confusing to users when they see a long list of character entries.

You must also decide whether to index special characters as a character or as a word. For example, you could index the asterisk (\*) character as: asterisk, \*, \* (asterisk), or asterisk (\*). You may need to include special characters in more than one format. As with any other entry, include whatever keywords you need to make sure the users can find the information they need. Don't be too concerned with indexing all special characters the same way, though. While you may need to index the asterisk character and the word *asterisk*, there are other characters that are not commonly known by name.

Also, don't forget that numeric entries will not sort in numeric order (1-9, 10-19, etc.) but in ASCII order (1, 10, 11... 19, 2, 20, 21, etc.).

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## **Flipping Entries**

Just as in a print index, you need to make sure that you provide multiple points of access to information in an online help index.

Flipping entries is the practice of making sure that appropriate subentries also appear as main entries. For example, if you have a keyword *printing* with a subentry *reports*, you need to make sure that *reports* is also in the index as a main entry.

This is not to say that every subentry must be a main entry, but you should look at every subentry to determine whether it should also be a main entry.

## **Double-Posting**

This indexing term refers to having multiple entries for the same item, with the same set of page locators. Because it's harder to do cross-

reference (*See* and *See also*) entries, you will probably double-post all synonyms and conceptual entries. It's important that the list of topics is the same for each of the entries, though. If the terms are really the same, they should point to the same topics. For example, you may want to double-post all entries for *bank transit number* under *transit number*, and possibly also under *direct deposit*.

## **What Shouldn't You Use?**

Is there anything that should *not* be used as a keyword? Yes!

- ↪ Don't use a topic title verbatim as a keyword. Some help authoring tools use the title as a default keyword, but this is seldom a good practice because the first word in the title may not be a significant word. For example, many topic titles begin with words such as *the* or *a*. Instead, make sure all the

significant terms in the title are indexed.

- ↪ Use a verb or a gerund as a main entry only if it really is the key word. There is some controversy about whether to use a verb as a keyword. The important thing to remember, though, is to consider what the topic is about. If a topic is about a report and how to print it, use the report name as the keyword. You can also add *printing* as a keyword, but use the report name as a subentry. If, on the other hand, you have a topic about printing in general, make sure you have *printing* as a keyword for that topic. And if you do use keywords like *adding*, *changing*, etc., make sure you also index the same topic under what it is you're adding or changing.
- ↪ Never begin a keyword with a word like *about*, *the*, *another*. When is the last time you looked up something that way?

## **Consistency Tips**

As mentioned earlier, a keyword style sheet can help you maintain consistency. This can be a set of guidelines, a list of keywords, or anything else you want done consistently. Decide early about general rules such as wording guidelines and how entries are capitalized. The more consistent the entries, the easier it is to edit the index. You can also create a list of standard keywords that you want applied to all appropriate topics. For example, if you have a keyword *adding*, with subentries for each of the types of things you can add in your system, having that term on a list can help ensure that the keyword is applied consistently.

## What Topics Should You Assign Keywords to?

In general, almost all topics should be accessible through the index. However, it is common practice not to assign keywords to certain topic types. This includes:

- Popups (these topics will appear in the main window when accessed through the index)
- Glossary terms
- Navigational topics (topics that help you navigate through the help file or the system, but do not provide any other information)

## Coding the Keywords

In order for the help index to compile correctly, you must code the keywords correctly. As you know, keywords are added to a help file by means of a K-footnote. Not only do you need to understand how to code the keywords mechanically, you also need to know some indexing guidelines.

First, don't overwhelm the user with a laundry list of topics when they choose a keyword:

- Don't assign the same keyword to more than about five topics (plus or minus the usual two). Remember that the user will get a Topics Found list, and trying to scroll through a long list can be very frustrating.
- Don't have more than about five subentries for any main entry. If your list of subentries is so long that it doesn't fit in the index box, the user will get lost.

Another key point is to consider what topics the first-level keyword should be assigned to. In print

indexes, you don't usually include page references by the main entry when there are subentries. You cannot do that in a help index, though. That first-level keyword must be present in at least one topic for the list to compile correctly.

You may find it easier, however, to work directly in the K-footnotes. You can view the entire keyword string and cut and paste keywords between topics if you work directly in the footnotes.

There is a limit to the character length of a single K-footnote (1024



## *First, don't overwhelm the user with a laundry list of topics when they choose a keyword.*

So what topic do you choose? You have two choices. You can assign the first-level keyword to:

- The topic with the most general information or that users are most likely to be looking for if they click on the main entry. If there is such a topic, this is the best choice.
- All the topics in the list. This only works if the list is very short, but you may want to do this if there is no topic with a general discussion.

The important thing is to think about it, and not to place the keyword in the first topic, or the one where you happen to realize you're using a subentry. There should be a logical reason behind the topic that displays when that main keyword is clicked.

As for entering the keywords, this varies with the help authoring tool. Each help authoring tool provides a mechanism for entering and editing keywords, which are then stored in the K-footnote (at least in MS Word-based authoring tools).

characters), but if you need more keywords you can add more K-footnotes. And don't forget that the keywords are case-sensitive — the compiler won't combine keywords that are not identical, including case.

## ***Coding for a Windows 95 Two-Level Index***

The Windows 95 help system includes a two-level index, which is really nifty. However, this feature gives many help indexers a real headache when they try to code the keywords. There are some tricks and some undocumented features you need to understand. Jan Wright's two-part article *Working with Help Keywords*<sup>3</sup> is an excellent source of detailed information, but some of the crucial information is summarized here.

The first thing you need to understand is that to get the subentries to display correctly, you *must* include the main entry as a separate keyword. If you don't, the separator character (usually a comma) and the first subentry will display on

the same line as the main entry. This is called a run-on entry, and is very confusing to users. When users see this type of entry, they usually assume that the second-level keywords all pertain to that run-on entry, not the first-level entry you intended.

But should you capitalize or not? Like many other issues, the answer depends on which authority you consult. The general trend is to use lower case for all keywords except proper nouns. Whether or not you decide to capitalize the first letter of main entries, however, the important thing is to decide early and be consistent.

This list includes some of the items you should check when you edit the index:

- ➔ Check that similar terms are phrased consistently. For example, all nouns should be either in the singular or plural form and all verbs should be in the same tense or form so users know what to expect.
- ➔ Check for phrasing problems that prevent the compiler from combining topics under a single keyword. For example, *print a report* and *print reports* should not be separate entries. When the users see the first term, they may stop looking and completely miss the second entry.
- ➔ Check for keywords that are more specific than a general keyword but that compile very closely together. For example, if *printing summary reports* appears immediately after *printing reports*, you can combine the two entries. Again, users are likely to overlook the second entry.
- ➔ Check that all double-posted entries have the same subentries and lead to the same topics. Since double-posted entries are synonyms for the same term, the user should get the same information from either entry.
- ➔ Check that subentries are also main entries when appropriate. Not all users will go to the same main entry, so if a keyword is only available as a subentry, many users will not find it.
- ➔ Make sure that the number of entries for a given type of information reflects its importance in the help file. You shouldn't have 15 keywords for a minor point, nor should you

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**Y**ou must determine which system most of your users are on, and design the index to work correctly in that environment.

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The two-level index can also create sorting problems, especially if you have a main entry that begins with the same word as another main entry that has subentries. Let's say, for example, you have a main entry for *employee*, with subentries, and another main entry for *employee number*. This will compile as

*employee*  
*employee number*  
*employee, hiring*

(with the latter as a run-on entry). To fix this, add a space after each of the main entry keywords:

*employee ;*  
*employee , hiring;*

### **Capitalization Issues**

The help compiler cannot combine entries unless they are identical, including case. For example, if you enter *Employee* and *employee*, the index will display two entries. This makes it important to capitalize keywords consistently.

### **What if Your Help File is Used in Both Windows 3.1 and 95?**

Unfortunately, the keywords that you code to display correctly in the Windows 95 Index function will not display correctly in the Windows 3.1 Search function. While the keywords will be functional, they won't be pretty. So you must determine which system most of your users are on, and design the index to work correctly in that environment.

### **Editing the Index**

Just like any other documentation effort, the help index must be edited and proofread. Fortunately, the Windows 95 Help Workshop includes a keyword report that you can use even if your help authoring tool doesn't provide this tool.

In general, the index should follow the same consistency and effective writing guidelines as any other component of the documentation.

have only one or two keywords for a very important piece of information.

## Testing the Index

When you test the index, make sure you scroll through the list and check every keyword. While this is time-consuming, it is important.

- Check for ambiguous entries - If a keyword leads to more than one topic, are the topic titles clear enough for the user to know which one to pick?
- Click on every keyword and make sure it leads to an appropriate topic.

If your company does beta or usability testing, make sure the online help, including the index, is covered in the test plans. Your users can provide useful information if you ask the right questions. For example, if the beta questionnaire has questions about whether the tester found the information they needed, provide space for them to write down what they were hunting, and what methods they used to find it. If they used the index, ask them to write down the terms they looked up (especially if they couldn't find the information).

## Now Go Index!

Regardless of how experienced a writer or indexer you are, you can improve the indexes in your online help. And believe me, your users will thank you!

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