

A to Z : The Newsletter of STC's Indexing SIG

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From the Editor:

Volume 5, Number 1? I'm astonished, since it doesn't seem like we have been doing this newsletter all that long. But it must be true, because there it is in the masthead.

This month we feature an article by Fred Brown on handling specific kinds of content in task-based documentation. We also take a brief look at a thesaurus construction software package, TermTree, and its uses for keywords.

STC has been very busy lining up events for the new year. There are plenty of announcements inside, and a preview of the indexing events coming up at May's conference.

May your indexes always compile!

Jan C. Wright



SOCIETY FOR TECHNICAL COMMUNICATION

by Fred Brown

Indexing User Tasks

In user documentation, we are principally concerned with four types of information:

- ☛ concepts (the basic model and principles that guide the user's intuitive and problem-solving activity)
- ☛ tasks (what the user is trying to accomplish)
- ☛ objects (the menus, commands, buttons and other "things" that the user manipulates to get the job done)
- ☛ problems (warnings, troubleshooting) and opportunities (tips, case studies)

Because user tasks form the foundation of modern "task-based" documentation, tasks should be well-represented in the index. We need to create index headings for both

- ☛ the broad objectives of the user (e.g., balancing a checkbook), and

- ☛ the specific actions required by the application (e.g., opening a file)

Main headings consist of nouns and gerunds. Gerunds are verbs ending in "ing" that function as nouns. Examples could be "deleting," "opening," or "compiling." With their origin as verbs, gerunds would appear to make natural main headings for tasks. We need to choose gerunds that are quite specific and that a user would look up. The three examples given—deleting, opening, and compiling—would be excellent candidates. However, words such as "displaying," "accessing," and sometimes "creating" may be too broad to offer much value to the user, especially if followed by a long string of subheadings.

Be sure to include words from the different software environments (Unix/Linux, Macintosh, or Windows) that the audience may be familiar with. You may include these additional terms by double-posting or by "See" cross-references. For example:

saving. *See* closing

For greater clarity, use gerunds in conjunction with the object being manipulated. In the following example,

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gerunds and their objects are combined into a single main heading:

- comparing files
- disabling build warnings
- mounting file systems
- scanning images
- sorting database rows

By combining the gerund with its object in the main heading, you can avoid the need for sub-subheadings, as shown below:

- comparing books 374
- comparing documents. *See also*
 - composite documents;
 - summary documents
- conditional 396
- items compared when 397–398
- multiflow 396

You can also simply make a gerund a main heading with a list of subheadings. For example:

- naming
 - dialog box buttons 111
 - dialogs 84
 - DSNs (data source names) 160
 - filename extensions for application files 74
 - projects 7
 - variables (Hungarian notation) 50
 - window classes 57

In most cases, you will want to double-post the gerund under the main heading for the object as well. In the following example, “skewing” is double-posted under “bitmaps” and “nodes”:

- bitmaps
 - skewing
 - ...
- nodes
 - skewing
 - ...
 - skewing
 - bitmaps
 - nodes

While much of this discussion has focused on gerunds, some indexers, or their editors, prefer to use the noun form of a word when possible. For example:

- configuration
- installation

Avoid indexing specific, application-oriented objects such as dialog boxes or menus, unless these objects are central to the application. A user is much more apt to look up a task under terms that are familiar. For example, use “deleting autocorrect entries” and “autocorrect entries, deleting” rather than “Autocorrect dialog box.”

Well-crafted index headings for user tasks will complement a modern “task-based” user manual. Create index headings for tasks that relate to the user—both goal-oriented tasks and key application-oriented tasks. In general, create at least two headings for each task: a main heading using a gerund or other “action-oriented” word, and a subheading under the object being used.

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Special Notice:

We will be publishing the print and online copies of the SIG newsletter simultaneously. After this issue, we will put out a survey to ask which version you use most, to find out whether we should continue with our print edition. Please keep track for us, so that we can get your input in May.