

Search, or use the index?

Following the 50th Anniversary Conference of the Society of Indexers, **Bill Johncocks** draws on his talk about changing user expectations of indexes.

A decade's use of search engines has blunted people's determination to find things out. They're now satisfied with almost anything about a subject, not worried about balance or completeness, and even happy to let a machine decide for them what's most important. The idea that an index will reliably retrieve everything significant, once taken on trust, now evokes suspicion: how could anything created using traditional skills compete with computer searching of the full original text?

More recently, the Web 2.0 phenomenon has meant that users who were once happy to consume Internet content now want to create it. Web 2.0 encourages the idea that, just as anyone can edit (as on Wikipedia), so anyone can index (as on Flickr). Collaborative tagging assumes that adding more freely chosen descriptors must automatically make something progressively more accessible.

It would be odd if these trends didn't affect technical documents, as demand for searchability leads to more manuals being delivered on CD-ROM or over the Internet. When that happens, the change in format usually leads to a change in the preferred access method because people look for the search button on a PC screen just as automatically as they turn to the back of a book seeking an index. But do they still find what they need?

Finding terms and finding subjects

Searching works less well because indexes provide access to subjects, not just words, and to their treatments, not just their occurrences. Indexes also provide links to related topics.

Even where language is well controlled and a spade is never called a shovel, free-text searching misses out the crucial step I stressed in my first article: thinking like the user. Only an index caters for the user determined to find shovels; only an index can provide task-orientated access to a product description. Online help and product manuals most often fail because they are inaccessible. You can't afford such failures, so introduce lots of alternative entry points: modern users expect more choice, not less.

Most users know the alphabet but not all can spell. Put 'baterly' into

Google and it lists over 400,000 hits but suggests you might have meant 'battery' (144 million): an Acrobat search will just return nothing. Look in an index and you'll find the correct spelling in virtually the expected place. Indexes also sort occurrences into page ranges (which identify the fullest coverage) and subentries separate them into specific groups of manageable size. Other methods don't. Remember, however, that we have no agreed alphabetical order for symbols!

Finding occurrences and finding information

Full text search results are always bloated by passing, duplicate and negative mentions. I index from printed proofs, then check and edit the draft index against the PDF version. It used to alarm me when, say, I'd put five page locators against a topic, to find the term occurred over a hundred times. On ploughing through, I would soon discover that these occurred on a much smaller number of pages. Sometimes there were ten in one paragraph and often twenty on adjoining pages that could be covered by a single page range. Those I'd omitted added no useful information, leaving me with my original five intact and a forgivable smugness. Remove the index and your user is faced with the full hundred.

Of course, your few index entries often provide much more: cross-references or double posting unite in one place the equivalent of several hundred text occurrences. I've noticed an increase in cross-references within the text (for example, 'for outdoor use, See Section 6') to compensate for the likely absence of a good index.

As an aside, to avoid discrepancies between the numbers shown on printed pages and the page numbers shown in Acrobat, avoid separate preliminary numbering schemes. Indexing to numbered sections, where they are available, might also work. Generally, a section concerns itself with an identifiable — and indexable — topic, while page boundaries are arbitrary. Like hyperlinks, section numbers will take users to a precise location, instead of abandoning them at the top of a page.

Possible strategies

Try comparing search and index performance on your own documents, in Word or Acrobat. Traditionally, an indexer has an advantage over his or her readers, in that only he or she has a searchable text. Check that your index does the job as well. You'll usually find that it does it much better.

The conference came up with no easy solutions to our book index problems but we must work with our natural allies — educators, authors, publishers and, of course, technical communicators — to rehabilitate proper, user-friendly indexes. We also need to re-examine the assumptions underlying our working methods. Internet users are wrong about the superiority of free-text searching and so need educating, but that doesn't mean they're wrong to find some indexes user-unfriendly. We can and should meet them half way. Techniques developed when books were the only instructional tools for individuals may no longer apply. Many user studies on student populations already make uncomfortable reading for book indexers. Are there any similar studies for technical publications, I wonder?

A good index adds far more value than online searchability. However, an index that is little more than a permuted table of contents, or that only extracts terms from the text, obviously adds less. Many manufacturers claim their users won't use indexes, but that's usually just a sign that their indexes are useless: they need to put more, not fewer, resources into indexing. We should remain open to the possibilities offered by synonym rings, tag clouds and topic maps but, at present, a fully searchable document is simply less accessible, and the product it describes less usable, than one with a well-designed index. Providing an index should mean less customer frustration, lower support costs and more repeat sales. If only we could prove it! **C**

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