

Quality control and benefits

Rounding off his series, **Bill Johncocks** looks at how to justify providing an index and how to evaluate one.

This will be my last column, at least for a while. Since the Spring 2006 issue of *Communicator* we have covered all the basics of indexing for technical publications and, though I'll happily help any reader with a specific question or comment on examples, I don't want to lead busy technical communicators down byways of interest only to full-time indexers. To conclude, I'll briefly review three important topics.

Making a case

By now I hope you're all convinced that, if you want your document to be usable and it's more than about 25 pages long, it will both deserve and require an index but you may still have to persuade a client. The key point is that information becomes progressively harder to retrieve as the size of a document grows and, for the user, information that can't be found might as well not exist. Providing an index is the only way to make an instruction manual fully usable.

There are two aspects of technical documentation that make a good index especially important. The first is that, the more necessary and comprehensive it is, the less likely anyone is actually to read it from cover to cover. Ask any doubters whether, when they take delivery of a new car, they read the entire manual before turning the key. If the controls look familiar, many of us won't even open it first. It's when you have difficulty folding down the rear seats, displaying the outside temperature or retracting the radio aerial that you reach for the instructions and... open them at the index. Users trying to extend their knowledge of a device's capabilities don't want to re-read the more basic information: users trying to diagnose a malfunction certainly don't want to search through the whole manual.

The second reason is that, while a bookshop customer can compare indexes when making a purchase decision and reject a book that's hard to use, product documentation has to be taken on trust; it's hidden away inside the box. If it's absent or bad, customers aren't likely to return the product. They'll start by blaming themselves, move on to blame you and probably look

for a different brand name when buying something similar. A good index should build customer satisfaction, product loyalty and recommendations, and reduce support calls, product returns and even accidental damage by users whose frustration made them reach for a bigger hammer. If anyone can prove that it does, I'd be delighted to hear from them but I sometimes wonder if any executive, before deciding to switch expensive customer support to Chennai, ever surveys customer satisfaction with the product literature, or thinks of putting half the effort into getting the instructions right that is later required to compile support scripts.

All too often, an index is seen as the icing on the project cake and, as such, gets left until too late or omitted altogether because the budget has already overrun. To guard against that, try to separate the funds and put aside the time for an index early on. If you're using a professional indexer, select, brief and commission them in good time, so that their involvement is assured: if you're doing it yourself, you should also start early. Embedded indexing (reviewed in Autumn and Winter 2006) gives you a huge advantage here because half the work will be done by the time you've finished the text. Defend the index because without it your best efforts might still result in an unusable document.

Remember, in case someone senior suggests it, that full-text search of online documentation isn't an alternative (as we saw in Autumn 2007). It doesn't build that bridge between your vocabulary and the user's needs; it retrieves too much and yet doesn't find everything; it's least usable on the most-sought subjects. An index isn't a list of phrases and where they occur. If it were, computers would make the best ones. Neither is it something already in the text, just waiting to be extracted: it's something you add to the text to make it usable. We might one day have systems that understand our language well enough for full-text search to work but today it's a poor second best.

Calling in a professional

There are many reasons why authors don't often make good indexers. Even

those with a talent for it (perhaps 10%) won't have the training, qualifications and experience of the average professional. Can you really afford the extra time to do it well? Unless you're practised, it'll take a lot longer and, if you don't have professional software (and I don't mean Microsoft Word), last-minute corrections will be harder. Are you too close to the vocabulary? Expertise can actually make an index less usable, especially if, as with any consumer product, it's intended for non-specialists.

You'd perhaps expect me, as a professional indexer, to urge you to engage a fellow member of the Society of Indexers but I recognise that the choice isn't straightforward. If your technical writing acquires the characteristics of a book (say more than 20,000 words) or is multi-authored, the benefits of a professional become compelling but, for a smaller document, you'll find professional indexers aren't used to quoting realistic rates for brief commissions. Also, our members can all index but you're a *technical* communicator; you need an indexer with sufficient subject knowledge. *Indexers Available*, now part of the Society website, lists our subject specialisms but don't take them on trust: you're entitled to ask us questions! The list also identifies the relatively few who are competent at embedding.

Brief the indexer about who the document is intended for, when it's needed by and how much space is available, along with any house style or conventions (samples can be useful here). Make it clear that you'll stay contactable to answer any queries: the indexer and author should function as a team. Indeed, for a document that is subject to regular updating, you may need to maintain that relationship, or you may prefer to update their work yourself. If so, make sure the indexer understands this.

There are really only two sensible approaches: make your own index by embedding as you go along or leave it until the end and use a professional. I'd suggest, if your manual is for a steam iron, you index it yourself but, if it's for a helicopter, get someone in. In the second case, the cost becomes visible, justification may be needed and

time must be found. If you are doing it yourself, I'd recommend indexing fairly large sections, not individual paragraphs. The latter traps you in your chosen vocabulary and presentation; the former helps you stand back and imagine which of the reader's likely needs might be met by that particular kind of information and hence how they'd look for it.

Evaluating an index

It's hard to contrive an index that adds no value to a technical document but some authors can rise to the challenge. My digital camera has an instruction booklet over 100 pages long and its arrangement is counter-intuitive, repetitive and fails to clarify the menu structure or to warn against a potentially serious problem most users will encounter. It includes an index, which is quite simply the worst I've ever seen. It breaks the first and most important rule I set out in back in Spring 2006: to put yourself in the reader's shoes and, in two short pages, commits every imaginable sin against usability, wastes most of what little space there is and omits nearly every obvious entry. I could base a full day's course on it. As the key to a badly organised manual on using

and caring for a powerful, complex and expensive creative instrument, it's quite useless. I had to learn what I needed to know from reading independent reviews, plus trial and error. It's a disgrace but sadly it's not unique.

Once you've created an index, or got one back from an indexer, how do you know whether it will serve? Here's what I'd do.

First, check that there's no entry with more than five page locators (we covered subentries in Summer 2007). Then sample one or more randomly chosen parts of the index (about twenty entries should be enough) and check the pages indicated, asking yourself:

- Do the entries make sense as written?
- Do they represent things likely to be sought by any reader?
- Do they lead to the correct text passages? (We dealt with choosing entry terms back in Summer 2006.)

Now do the reverse: sample one or more randomly chosen runs of pages and:

- Check that the entries you'd expect to see are actually there.
 - Check general usability.
 - Check compliance with house style.
- Finally, check a few cross-references (Spring 2007), asking:
- Do they cater for any known synonyms?

- Are they consistent, helpful and appropriate in number?
- Do they lead somewhere? If they do, is what's there worth all the page turning (remember the double-posting alternative)?

More subtly, does the index add new vocabulary and entry points? Consistency in a text is a virtue; in an index it's usually a weakness.

In conclusion

If you've followed this series, you won't underestimate the task of indexing and your indexes should now be at least serviceable: none of your work is ever likely to cause frustration or wasted time. Don't expect praise for your indexing though. An index is a tool, and the better a tool performs, the more we take it for granted. Without an index, your finest technical writing can't do its job. With one, your readers can fully appreciate your skills. **C**

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ACCURACY

COMMUNICATION

PASSION

1968–2008 From the Communicator archive

How important is accuracy in your handbooks? The report of the public enquiry into the Argonaut air disaster at Stockport in June last year (*The Times*, August 22, 1968) produced among its major findings a statement that, 'failures of communication... caused the Stockport crash'. It seems that the information that could have averted the disaster was available but it did not reach those who needed to know. The Flight Manual did not include a warning on the possible mis-positioning of the fuel cocks.

Uncredited, Seen and heard, October 1968

It would, for example, be interesting to know what the membership think the ISTC can do, or should do, to further the interest of its members. Should the emphasis be placed on recruitment on the basis that the influence (power?) of any organisation derives from size? If so, how should recruiting be tackled — what incentives to join can one offer the potential member? Should one go first for quality, and if so how? Obviously there are no recognised qualifications in the UK — or anywhere else — for a 'communicator' in the specialised sense in which we wish the word to be used — as a professional description. But by establishing the correct relationship with educational authorities it should be possible to build a second generation of communicators who have been trained, and qualified in the sense that they have passed appropriate examinations, in the basic science of communication.

Chairman of Development Committee, Anything to communicate?, October 1973