

northbay news

The monthly newsletter of the NorthBay Chapter of the
Society for Technical Communication

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The Art of Indexing

John Dibs, NorthBay Chapter

Marla Wilson of Printed Page Productions in Berkeley gave the November 2001 monthly presentation. Prefacing her comments with a disclaimer, Wilson explained that indexing standards and conventions are generally inherited from the academic world and are often inappropriate for technical documentation. She also shared the philosophy that index quality is driven by document content; if a document is not well designed, the index will invariably suffer.



Racing against the clock? Use the index to save time finding information!

Understanding Concepts

Wilson cited Nancy Mulvaney, an indexing enthusiast and former president of the American Society of Indexers, to introduce the definition and purpose of an index. According to Mulvaney, an index is a structured sequence—resulting from a thorough and complete analysis of text—of synthesized access points to all the information contained in the text. Wilson shared her own working definition: An index is a catalog of terms or topics organized by subject and typically listed alphabetically. Wilson cautioned that indexes are intended to point to the information in the text, not to recreate it.

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This Month's Meeting **Thursday, January 17, 2002**

SnagIt5 - Advanced Screen Capture

SnagIt is a powerful, flexible, and easy-to-use program for image, text, and video capture. Rolfe Dlugy-Hegwer's presentation will provide the following:

- √ Overview of SnagIt5 features
- √ Walk-through of key SnagIt5 features
- √ Examples of screen captures in online and printed documentation
- √ Q&A discussion of when and how to use image, text, and video capture in technical documentation

Rolfe Dlugy-Hegwer is a Senior Technical writer at TrueTime, Inc. in Santa Rosa. He has six years of professional experience as a consultant and regular employee at: Levi Strauss & Co., Centric Software, Fireman's Fund, Xuma, MarchFirst, and Franklin Templeton. Rolfe has a diploma in French Civilization from La Sorbonne, Université de Paris, and presently lives in Petaluma with his wife, four children, two dogs, and three Buff Orpington chickens.

Meeting Schedule

Location:	Golden Gate University, 150 Professional Center Dr. Rohnert Park	
Time:	5:30 - 6:15	Networking, Show and Tell
	6:15 - 8:00	Introductions and Program

STC Mission Statement

The mission of the
Society for Technical Communication
is to improve the quality and effectiveness
of technical communication
for audiences worldwide.

Dreamweaver Magic and Online Help

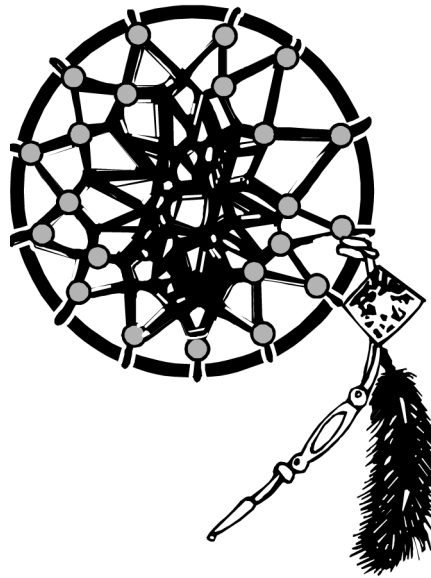
Elyse Lord, Editor, northbay news

Online help specialist Jason Gervich led a workshop through UC Santa Cruz's Technical Writing and Communications program entitled *HTML-Based Help: An Introduction*, on November 10, 2001.

The course covered the basics of online help development, including a comparison between different types of help systems. For instance, Gervich pointed out that HTML-based help runs on any operating system's desktop, while Windows Help can run only on a Windows desktop. And he reviewed the main types of help topics, including concepts, tasks, references, lists, glossaries, and topic branches.

Of unexpected interest was Gervich's decision to emphasize Dreamweaver, an HTML editor and design tool. Gervich finds Dreamweaver to be a more powerful application for developing online help than RoboHelp, which he describes as "Internet Explorer-centric." According to Gervich, "Virtually every client that I've talked with says, 'forget RoboHelp' Dreamweaver belongs to the next generation of tools."

Gervich introduced Deva Tools for Dreamweaver and Deva Search tools, which can be used to extend Dreamweaver's capabilities.



You can use Dreamweaver to help users catch on.

Dreamweaver's distinctive features include that it:

1. Gives developers an open environment, which allows Dreamweaver software to be extended to create indexes, search engines, and the like.
2. Creates code that works on Windows, UNIX, Linux, and Mac platforms.
3. Has a reasonably accurate and therefore convenient WYSIWYG (what you see is what you get) interface.
4. Has template capabilities that allow developers to create editable and non-editable regions on a page, to change design elements for an entire project quickly, and to maintain a consistent look from topic to topic and project to project.
5. Has library items like images and text that developers can reuse or update. For example, a developer can quickly drag a color, a character, or a template from a library file into a document.
6. Has cascading style sheets that are used in conjunction with templates to help developers create a consistent look for their help topics. Style sheet types include linked styles, which can be applied to several different files;

embedded styles, which affect only the document they are embedded in; and inline styles, which affect only a section of a document.

7. Has a layout view that allows developers to create clean tables that work in all browsers and that either have a fixed width or that can grow to fill a browser window.
8. Can be integrated with content management or version control systems like Microsoft Visual SourceSafe and WebDAV software, so that a large development team can use Dreamweaver as its front-end development tool.

One of Dreamweaver's most attractive features is that it is extensible. Gervich introduced Deva Tools for Dreamweaver and Deva Search tools, which can be used to extend Dreamweaver's capabilities.

Deva Tools for Dreamweaver allow developers to create navigation systems like tables of contents in several types of formats, including collapsible and expandable. With help from Deva Tools, a developer can automatically generate a table of contents from topic titles and topic headings.

Deva Search is a client-side indexing tool that allows Web site users with Netscape or Internet Explorer version 4.0 or higher to perform full-text searches across multiple HTML documents. Free trial versions of Deva software are available at <http://www.devahelp.com>.

"'Forget RoboHelp'... Dreamweaver belongs to the next generation of tools."

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The Art of Indexing

Continued from page 1

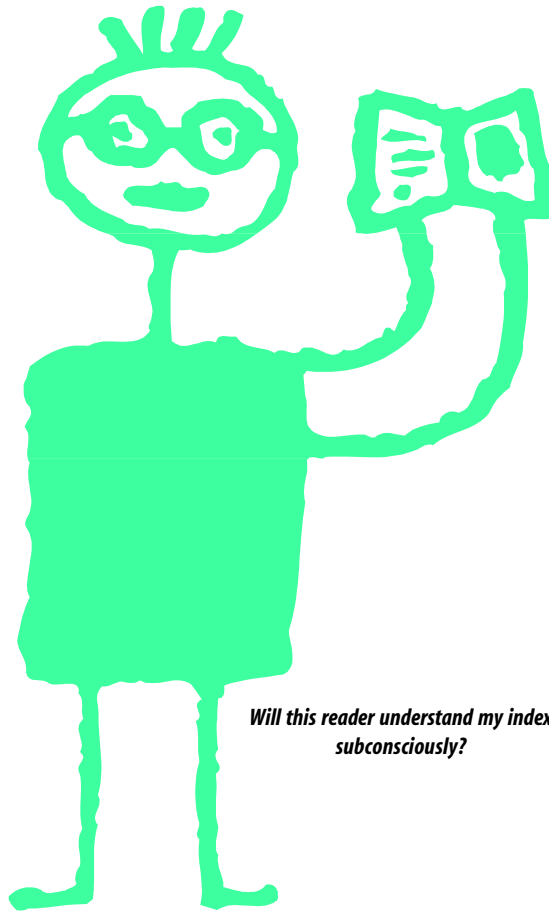
Indexes are intended to point to the information in the text, not to recreate it.

Indexing alphabetization can be in either letter-by-letter or word-by-word order. A letter-by-letter sort ignores all nonalpha characters, including spaces and commas. Wilson prefers the letter-by-letter method because it is more phonetic than word-by-word. (The default for FrameMaker's indexing feature is word-by-word alphabetization. To change it to letter-by-letter, add a space as the first character on the *Ignore Characters* line of the index's reference page.)

Wilson next covered indexing terminology. *Primary entries* are main headings, while *secondary entries* are subheadings under main headings. *Single entries* have only one reference per concept, while *double entries* denote primary and secondary entries that are inverted and listed with the secondary entry as the primary. Wilson also discussed *page locators*, (references), *see* and *see also* cross-references, and *differentiated entries* (multiple page locators that have been grouped into secondary entries). Indexes for nontechnical material often have up to seven or more page references per entry, whereas technical material typically has from one to three locators per entry.

Approaching the Task

Indexers begin their craft by analyzing the audience. What level of education and experience does the audience have? How will the book be used? Are readers likely to be using the index or the manual for the first time, and are they knowledgeable about the material? Answering these and other questions helps in the design of a user-centered index.



Wilson's discussion evoked two more insightful questions. Do readers understand an index subconsciously? By scanning, can they pick up the meaning intuitively? Although these questions may seem esoteric, they make us stop and think about how readers understand information.

Do readers understand an index subconsciously? By scanning, can they pick up the meaning intuitively?

Designing for an audience that includes both novice and experienced readers calls for generous use of primary entries and detailed information, as well as double entries and use of alternate terms for the same concept. The indexer should use cross-references both for directing readers to where they can find entries as well as for vocabulary control: For example, if the text uses the term PC, an indexer might use computers. *See PCs* as a cross-reference to the preferred term.

Mastering Mechanics

Wilson also discussed indexes in relation to content. Indexes for reference manuals will undoubtedly contain lots of lists, and material with multiple levels of details will require repetitive primary entries. For example, entries for "local domains" could be grouped under the following primary entries:

local domains, installing manually
 local domains, installing automatically
 Note the use of the comma separating the first and next level of information.

Continues 

The indexer should use cross-references both for directing readers to where they can find entries as well as for vocabulary control.

A syntactical relationship must exist between primary and secondary entries. Wilson gave the following example:

variables
in background text frames
entering

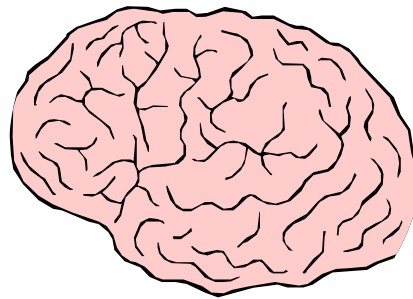
Although the indexer may use common prepositions and conjunctions syntactically as the first word in the secondary entry, the alphabetizing routine should ignore these. Standalone indexing software will automatically handle these sorting exclusions, but FrameMaker will not. To “force” a sort in FrameMaker, you include the intended alphabetization in square brackets following the entry in the index marker. The first secondary entry in the above example would need to be entered in a FrameMaker index marker as
variables:in background text frames
[variables:background]

Wilson would have us keep in mind a few other principles when crafting entries. For secondary entries, bring the most important term to the front so that readers will view entries sorted by the most important concept. Avoid weak word choices. For example, “adding” and “modifying” are weaker choices than “backing up” and “configuring.” Determine beforehand whether illustrations and screen shots are important to the manual. If they are not important, leave references to them out of the index. According to Wilson, the content and structure of the manual will assist you in making indexing decisions.

Conforming to Styles and Conventions

Wilson’s presentation handout contained valuable guidelines, including the following:

- ◆ For secondary entries, consider using the term *overview* for conceptual information; *about* for general information; *described* for detailed information; and *defined* for a definition rather than a description).
- ◆ Include page ranges when the discussion spans more than one page.



Using the index is a great way to show others that you have one of these!

- ◆ Don’t use special font attributes for elements such as methods or objects, even if the text does so. (Users are not reading an index, just getting access points to the information).
- ◆ Set primary entries lowercase, except for proper names and nouns, Wilson suggests.
- ◆ Consider citing page references for glossary terms or instructions in bold or italics, which some readers find useful. If you do so, include an explanatory note at the front of the index or in the footer to explain the convention.
- ◆ Be consistent in the treatment of acronyms. Provide a cross-reference from the spelled-out form to the acronym, or vice versa, depending on

If illustrations and screen shots are not important, leave references to them out of the index.

how the text uses the term. Be reasonable about repeating long terms in cross-references and secondary entries.

Following a Process

Wilson shared with us her process for indexing. Although most indexers agree on a basic process, individual indexers create their own nuances about how to go about their craft.

Wilson explained that creating an index structure requires what she calls “mind space.” Consequently, no one should attempt to create an index during the writing process. Wilson begins the indexing process by writing entries on a hard copy of the document. She then creates a draft structure and solicits comments from the writer or the subject matter experts. This step ensures that she gets buy in for the final product, and it is a way of catching any discrepancies between what the indexer and client expect.

With an agreed-upon index structure in hand, Wilson then embeds index markers into FrameMaker to create the index. During the discussion, she firmly sided with those who support the use of embedded markers, or codes in the authoring document, for generating an index. Although standalone indexing software offers more efficient controls and features than does FrameMaker, using embedded markers avoids the necessity of entering and proofing page numbers.

Continues ➤

Formatting in FrameMaker

Wilson uses em spaces, rather than commas, between terms and page reference. She feels that using commas to separate the two is not helpful to the reader. She reminded us always to use en dashes, rather than hyphens, for page ranges.

Wilson suggests using only one entry per index marker in FrameMaker. Why? First, FrameMaker has a 255-character limit for each marker. In addition, finding one entry among several when editing is cumbersome. There's also the danger of unintentionally deleting entries when they are grouped together.

She suggests placing markers at the beginning of words and cautions us to avoid putting them in headings. Although index markers work in FrameMaker in conjunction with conditional text, be sure that you intend that the index reference to generate only when the conditional text is showing. Also, be careful that the marker

type is always "Index" in the marker dialog box. The default index type drop-down selection changes after you have viewed a cross-reference or other marker type; backtracking to correct mislabeled markers is a tedious process indeed.

Although many writers and indexers prefer the peace of mind of having markers, I am not convinced that the effort involved in embedding markers always pays off in the end. Still, technical documentation in most cases involves document maintenance in FrameMaker, so the choice is between using Frame's somewhat cumbersome indexing feature and using standalone indexing software. As a part-time indexer and index enthusiast, when I have the choice, I prefer the latter approach, even if it involves duplicating the index in FrameMaker.

Throughout her presentation, Wilson's dedication to and passion for the art of indexing carried the discussion. It was a distinct pleasure to have an experienced

indexer visit our chapter and draw attention to this often undervalued component of technical documentation.

Resources

American Society of Indexers,

www.asindexing.org

Art of Indexing, by Larry S. Bonura

Beyond Book Indexing, edited by Diane

Brenner and Marilyn Rowland

Chicago Manual of Style, 14th edition,

Chapter 14

Indexing: A Nuts-and-Bolts Guide for

Technical Writers, by Kurt Ament

Indexing Books, by Nancy Mulvaney

Indexing from A to Z, by Hans H.

Wellisch

Marla Wilson is a freelance technical indexer. She can be reached at marla@printedpage.com. John Dibs is a senior technical writer at Barra, Inc. in Berkeley and offers a workshop, Introduction to Indexing, at Sonoma State University's School of Extended Education. The next workshop is April 20, 2002. For information, visit www.sonoma.edu/ExEd/Text/Spring/tc.html



Dreamweaver

Continued from page 3

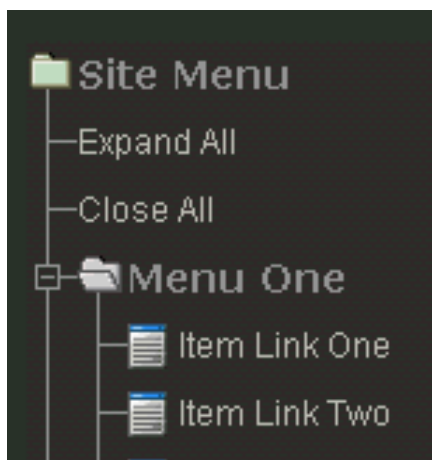


Figure 1: Treeview navigation

Also of interest for those who have to operationalize an online help development effort was Gervich's resource list, which included Al Sparber's new book, *Dreamweaver® 4 Magic*. The book provides readers with step-by-step instructions — and code — for using



Figure 2: DHTML tab interface

Dreamweaver to simulate treeview navigations, to create HTML frame-based interfaces, and to build DHTML dropdown menus and tabs, flyout menus, and rollover buttons. See **Figure 1** for an example of treeview navigation and **Figure 2** for an example of DHTML tabs.

Other particularly useful references that Gervich discussed include the following:

- ◆ *Designing and Writing Online Documentation: Hypermedia for Self-Supporting Products*, by William Horton.
- ◆ *Dreamweaver 4 Hands-On Training*, by Lynda Weinman and Garo Green
- ◆ *HTML 4 the World Wide Web: Visual QuickStart Guide*, by Elizabeth Castro

- ◆ *Information Architecture for the World Wide Web*, by Louis Rosenfeld and Peter Morville

Gervich's next online help course, entitled *RoboHelp HTML Edition: Introduction to HTML Help*, will be offered on March 9 in Cupertino. See

<http://www.ucsc-extension.edu/main/business/writing.html>

for more information.

Note: Would you like to add to this discussion? Write up your experiences developing online help and send them to [northbaynews, c/o elord@pon.net](mailto:northbaynews,c/o/elord@pon.net).



New Listserv in Town

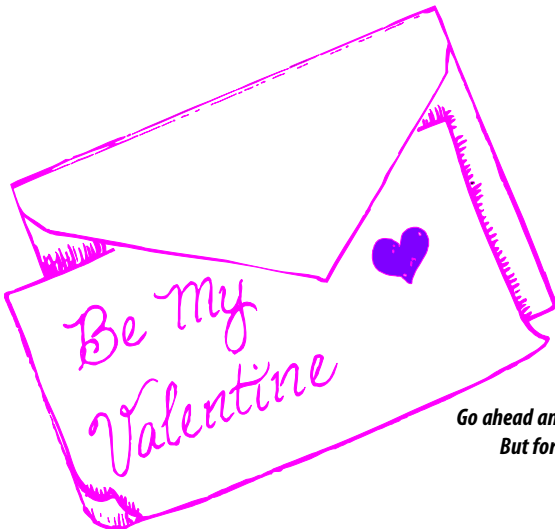
Barbara Herbert, NorthBay Chapter

Would you like to be able to share information with other members of your local STC chapter? Do you want to receive e-mail when someone finds out about a contract or permanent tech writing position? Have you sometimes wished you could ask your STC colleagues a work-related question?

If your answer to any of these questions is yes, you're in luck! The NorthBay chapter has just initiated a mailing list for local chapter members. It's easy to subscribe. Just send an email to majordomo@lists.sonic.net with the following text in the body (not the subject) of the message: subscribe stc-northbay your_address@your_internet_service_provider. (For example, my request would say *subscribe stc-northbay barbara@sonic.net* - no period at the end of the line.)

That's it! Within minutes, you will receive a message welcoming you to the list and letting you know how to use it. Keep this message for future reference.

We look forward to seeing you online!



*Go ahead and write a love letter this Valentine's Day.
But for Pete's sake, don't get too technical!*

Northbay News Briefs

2002 Brings New Faces to Northbay News

John Dibs recently handed responsibility for editing the *northbay news* over to Elyse Lord. As he also shared a skilled crew to write, copyedit, lay out, and publish the newsletter, the transition was relatively smooth.

Northbay news is currently recruiting writers and someone with an interest or expertise in layout and design.

Job Losses Take Their Toll in North Bay

With job cuts in 2001 tallying an estimated 3,700 in Sonoma County and close to 1.8 million nationwide, and with too-many technical writers in Bay Area STC chapters still looking for work, the average technical writer's morale is at an all-time low.

According to Lord, one of *northbay news'* goals is therefore to publish articles that help North Bay technical writers—employed or not—to retain a sense of interest and pride in their chosen profession.



Training Opportunities for Technical Communicators

Intro to Web-Based Animation with Flash

starts Jan. 14 in Santa Rosa
\$15.50 + fees

www.santarosa.edu

(select Schedule of Classes, then Spring 2002, then Computer and Information Sciences)

ASTD TechKnowledge 2002 Conference and Exposition

starts Feb. 4 in Las Vegas
prices vary

www.astd.org/astdTK2002

Managing Your Documentation Projects

starts Feb. 19 in Alameda
\$725

www.usabledesign.com/03register/03register.htm

Documenting Java for a Developer Audience

starts Mar. 6 in Sunnyvale
\$390

www.ucsc-extension.edu/main/business/writingcert.html

Writing for the Database Industry

starts Mar. 16 in Sunnyvale
\$330

www.ucsc-extension.edu/main/business/writingcert.html

Know of more courses, workshops, or conferences that might interest other chapter members? Send the course title, price, dates, location, and/or URL to elord@pon.net



**We meet on the third
Thursday of each
month**

**Our January Meeting
Thursday,
January 17, 2002**

Topic:
SnagIt5—Advanced Screen
Capture

**Our February Meeting
Thursday,
February 21, 2002**

Topic:
To Be Announced

Golden Gate University
150 Professional Center Drive, Suite E
Rohnert Park
<http://www.stc-northbay.org>

