Project Planning

Designing an Indexing Project

An index is created to serve as a finding aid for the correct record. It does not need to be an exact transcription of a record. It does need to be user friendly and intuitive.

After selecting the record type you will be indexing you will need to:

1.   Select the information to be included in the index. Genealogical indexes are generally Surname indexes. A surname index might include but is not limited to any of the following fields along with the Surname: given name, date of event, record number and place. Since the goal is to send you to the record not abstract it select only those items that are needed to help the researcher select the correct entry.

2.   Select the program that will be used to compile your project. Compilation can be done in a word processor, a spreadsheet or a database program. Using a database will give the most options in sorting a final presentation so it is often the preferred program type.

        Before selecting a program keep in mind the following. Will it be easy to export the index to another program for publication? Will it be possible to import records created by volunteers who do not have the program? If both these needs can be met, then it is often best to let the Project Compiler use a program that they own and are familiar with.

3.   Set guidelines for the volunteers who will be doing the indexing. Print the guidelines and distribute to all volunteers. If the project is being compiled onsite, keep a copy of the guidelines with the records being used. [See Sample Guidelines at the end of this document.]

        Before importing records into the ongoing project, be sure that the guidelines have been maintained.

4.   Although each volunteer should be asked to proof read their own entries, or perhaps exchange with another volunteer to do so, it is still important for the Project Editor to go through the final copy looking for out of place entries.

5.   Once the index is fully compiled it can be published to a web page, put on a CD or printed. The choice might depend on whether the society is hoping to make money from the project.

6.   Set a timeline at the beginning of the project. If volunteers are not meeting deadlines, the project coordinator should contact them and determine if they are going to participate or if their section of the project should be assigned to someone else.

Sample Indexing Project Guidelines

We are creating an every name index for the .... history which has been printed in three volumes. Attached you will find copies of ten pages to index. Please follow the following rules in creating the index.

1. The fields we will be using for this index are: Surname, Given name, date, page number

2. Please compile your index with those headings and the records in that order.

3. Do not use commas except to divide the fields. [comma delimited text]

4. Dates should be entered as day month year [12 Nov 2006] most often you will only have a year, this is acceptable, but if using a spreadsheet or database you may need to set the field as a text field.

5. Page number should include volume and page number [II-274]

6. Special rules for given names field
   1. Avoid using titles – This includes Mr, Mrs, Miss, Rev, Dr, Esq, II, III, IV, Jr, Sr, etc. Names can change place in the index if titles are used in the indexing. *Examples [Rev. John Smith could be Smith, John [Rev]; Smith, John; Smith, Rev John. - will you think to look under Rev, Dr, Esq, or Prof etc. Some indexes even use Smith, Mr. John. John Smith Jr. can be Smith Jr., John; Smith, John Jr;, Smith, John.*
   2. *If you encounter a woman as Mrs. or Miss with no given name, just initials, or a husbands name, use [Mrs.} or [Miss] after the initials if they are given.   [Smith, N. [Miss], Jones, John [Mrs.], White, [Mrs.].*
   3. If you encounter a name with no given name but a title, i.e. Rev. Johnson, put the title in [ ]. Johnson, [Rev.] Again, omit the title if you have a given name.

7. Special rules for the Surname field.
   1. Do not put a business name such as Alexander & Jones in the Surname Field. Do put Alexander in one entry and Jones in a Second.
   2. If you believe that a name is incorrectly spelled in the text, this might be because of previous entries or because of your knowledge of the area, create a separate entry for the name using what would be the correct spelling but also include the name as printed in the book.

8. You may compile the index in any program that you are comfortable with. However, the file you submit to the Project Compiler should be in one of three formats: a comma-delimited text file; an excel file; a dbase file. If your program will not export to one of these formats then use the notepad to create a comma-delimited file. Please do not submit Microsoft Works files, the project coordinator does not have this program on her computer and the files will be garbage. Microsoft Works will export to a comma-delimited text file.

9 Proof read your index before submitting to the Project Compiler.

10. Date for final submission is _____ . If you will be unable to meet that deadline, please contact Project Coordinator _____ at _____ and he will find another volunteer to index your pages.

Thank you for taking part in this project.