



Guide to Indexing



159 Queens Road, Panmure, Auckland. PO Box 14036, Panmure, Auckland 1741. Ph 09 570 4248. www.genealogy.org.nz

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A set of records, a book, newspaper cuttings, lists of names, or other records have been identified as worthy of indexing.

What sort of index should be made? Should a full transcription be made? Should it be indexed on cards? If a computer is used what programme should be used? Should the index be published? If so, in what form?

Following is a guide to indexing and some information to enable you to start and finish a project in the most efficient manner.

What sort of index?

A simple index giving names and reference numbers will enable a researcher to go back to the original documents. The NZSG has a set of guidelines to creating a simple index. See pages 4 and 5.

Full Transcriptions

A full transcription converts all the information in a record into uniform tabulated fields. Full transcriptions offer full protection for the original record against loss or damage. However, there are a number of reasons why this is not the best option for indexing. Firstly, a full transcription will usually take much longer to compile. The more records requiring indexing the longer it will take.

Full transcriptions can be taken out of context. A simple index will lead the researcher to the document where it will be seen with the contemporaneous entries and these may help to build a better understanding of the entry.

An opportunity exists for a genealogical group, historical society, museum or archive to advertise and create an income stream from a simple index whereas a full transcription may not lead to an enquiry.

Computer or Card Indexes

Computer indexes are much more versatile than card indexes. A card index is still useful but it has many disadvantages. It can become extremely large, be subject to misfiling, and as it usually can only be housed in one location could be subject to loss.

A computer index can easily be held in a number of locations, can be sent by email and even a novice can help to create such an index.

Computer Programmes

It is not necessary to have a special computer programme to create a simple index. It is suggested that a spreadsheet programme be used. The NZSG standard spreadsheet programme is *Microsoft Excel*®, but you can use *Open Office*. Indexes created in a spreadsheet can be easily transferred into another programme for searching. An indexing format is available on request from NZSG.

Publication

The restrictions of the Privacy Act must be fully considered before publication. This does not need to restrict what is indexed – only what is published. When publishing, details of the project need to be outlined together with the scope and the source of the information. It should also include particulars of how researchers can locate the original together with restrictions, if any. Other details such as the length of time the project has taken along with those who have assisted with the project can be included.

The NZSG can assist in the publication of Indexing and Transcription Projects. If the project meets the Approval criteria the NZSG may undertake the publication with a 50/50 profit sharing agreement. The NZSG will fund the production and when all set up costs have been paid will distribute the profit on a regular basis. The NZSG has its own search engine which has been used for other publications on CD Rom.

Criteria for an NZSG Indexing Project

- Records of historical and genealogical value
- Records with mainly New Zealand associated content
- Records of local, regional or national importance
- Records unique to a specific area, time or occupation
- Transcriptions made in a format acceptable to NZSG
- Project managed in accordance with NZSG instructions.

Priority will be given to

- Records that are more than 75 years old
- Records which are “at risk”
- Records where the completed projects will be readily available to members of the NZSG.

Many people commence projects that have already been done by others. Check the NZSG Projects Register.

The NZSG has the forms for Registering a Project (F9) and the forms for Releasing Records for transcribing by a Repository (F10). Download the forms from the NZSG website.

Training of Indexers

The NZSG holds training sessions for prospective indexers. These are generally held at the FRC, 159 Queens Road, Panmure and are a “hands on” workshop using computers and a spreadsheet. Alternatively, a trainer could be sent to your area.

Attendees should be reasonably familiar with using a computer. If not then they need to attend one of our “Scared of the Mouse” or “Introduction to Computers” courses prior to the “Indexing Workshop”. There may be similar free courses at a Community College or Senior Net group in your locality.

Indexing Groups

NZSG members working within a repository are volunteering their time and are creating an index for both the NZSG and the repository. The NZSG has a Volunteer Agreement (F43) which needs to be signed prior to commencement of the project (download from the NZSG website).

Financial Assistance

The NZSG has a project budget and some financial assistance may be available for Approved Projects. Typically this will be for photocopying, stationery and postage. However, applications must be made to the Projects Management Committee before any of these costs is incurred as under no circumstances will costs be covered which have been incurred prior to approval being given. An application form for Project Funding is available on the NZSG website.

Copyright

The copyright of the original material is determined by The Copyright Act 1994 but generally will be held by the Repository. The copyright of an index created by NZSG members for the NZSG will be held by the NZSG.

Assistance and Support

For further assistance and support please contact:

The Projects Management Committee
New Zealand Society of Genealogists
P O Box 14036, Panmure
Auckland, 1741

Telephone 09 570 4248
Fax 09 570 4238

NZSG Indexing Standards

The following are standards for a simple index. These are not standards for a transcription.

Key what you see – this means that what is on the page is what is typed or keyed. The exception is for full stops and some punctuation. It is now common practice not to enter full stops when typing initials.

Examples:

Rev.	Entered as Rev not Reverend
Reverend	Entered as Reverend
Esq.	Entered as Esq not Esquire
Sister	Entered as Sister
Fr.	Entered as Fr
P.A. Brown	Entered as Brown (first field) P A (omit the full stops but put a space between the initials)

A spreadsheet is used to enter the data. Set it up like this:

1 st Row	Enter the name of the book or publication in full including author
2 nd Row	Leave blank
3 rd Row	Enter the headings in the following order: Surname Given Names Title (i.e. Mr, Mrs, Rev etc) Page Comments
4 th Row	Begin your data entry. After the first row, save your work and save at frequent intervals thereafter.

You may extend the columns by left clicking and holding on the line between the column letters (e g A | B) until a straight line and a double arrow appears, then drag to the right.

Important! Remember to save frequently and copy to a flash drive, pen drive, floppy disk, or CD Rom at the end of your current session.

Data Entry Hints

- Surname** Enter as it appears in the document paying particular attention to spaces, hyphenated names and lower case prefixes. For example: McDonald, Macdonald, Vandenberg, Van den Berg, Deslandes, Des Landes.
- Given names** Only include these where they are connected to a surname. For example, if in the text it says "Bill went to ..." you would ignore this name. However, if it said "Bill Brown went to ..." you would index this name.
- Title** Where in the text "Mr and Mrs Henry Brown did ..." enter each name separately:
- | | | |
|-------|-------|-----|
| Brown | Henry | Mr |
| Brown | Henry | Mrs |
- Page** Some smaller publications do not number the pages. Number the pages in pencil allocating the cover as 1. Often publications have names recorded on the pages before the numbering commences. Number these in pencil with roman numerals, i.e. i, ii, iii, iv, v, vi, vii, viii, ix, x, etc
- Comments** Short comments only should be recorded. For example: group photo; headstone transcription; Parish register entry.
- Age** Years only. However if the records have ages in years, months, weeks, days, or hours it may be appropriate to set these up in two columns the first recording the numeral and the second recording the unit expressed as y (years) m (months) w (weeks) d (days) h (hours)
- Date** If dates are to be recorded then set up three separate columns and format all the cells as Text. Numbers can then be entered as 01, 02, etc and years prior to 1900 will be accepted in *Excel*®
- First column = day (02, 12, 22)
- Second column = month (enter first 3 letters only i.e. Feb, Sep)
- Third column = year (1896, 1943)
- Data is more easily combined than separated therefore separate columns are preferred for dates
 - The apostrophe is next to the Enter key (for names like O'Brien)
 - Index names in advertisements (your family might have had a local business)
 - Don't use any extra spaces, as these cause the electronic checking programme to think there is an error
 - An index may include other fields as appropriate to the particular records
 - Key what you see – this may be at variance to advice for indexing.
 - If you come across an error in the spelling of a surname, particularly at the beginning of the name, then you may (after consultation with your team leader) add a new line with the correct spelling and add the incorrect spelling in square brackets along with the reference. For example Brown [see Borwn], ref 6285.

Source

Sometimes a source may need to be included with each entry. The source reference must be sufficiently detailed to take the user back to the original entry.

Instruction Sheet

An instruction sheet should be set up for each project. This could include abbreviations used for a particular project. For example you could be indexing funeral directors and one had a name like *Tasteful Funerals Limited* so instead of keying this, the instruction would say key T and a macro would convert this to the correct name at a later stage. Another instruction could deal with ages expressed as years and months. Care needs to be taken in compiling this instruction sheet so that it is easy to follow.

Checking

It is preferable to have two sets of the same data keyed by different people, which can be compared by an electronic checking programme. Acceptable, but less desirable, is line-by-line checking by an independent person.

Sample Index

A Sample Index (Partial) showing data entry and some common errors follows for your information.

Some Excel® Tips

- To access *Excel*® on a computer:
Click on Start then click on Program. Click on Microsoft Office (sometimes you can omit this step) then double click on Microsoft Excel.
Note: Your computer may have an icon for Excel on the desktop, in which case a double click on the icon will open the programme
- If you want to repeat the same data as in the cell above:
Hold down the Ctrl key and press the apostrophe key (next to the return/enter key)
- To keep the headings showing whilst scrolling down the page:
Using Excel 2000® or Excel 2003®
Put the cursor in cell A4. In the Window menu click on Freeze Panes (a line will appear under the headings, and this will remain at the top of your screen).
Using Excel 2007®
Put the cursor in cell A4. Click on View then click on Freeze Panes.
- To format a column:
Using Excel 2000® or Excel 2003®
Highlight the column by clicking on the letter at the top of the sheet. In the **Format** menu click on **cells**. On the **Number** tab click on **Text** then click OK.
Using Excel 2007®
Highlight the column by clicking on the letter at the top of the sheet. Click on **Home** then on **(Cells) Format**. Under **Protection** click on **Format Cells**. On the **Number** tab click on **Text** then click OK.
- To repeat a page number down the page:
Enter the same number on two lines one under the other. Then click into the first line and continue to hold the left mouse button, dragging it down to highlight both numbers, then let go. This will leave a small square in the bottom right of the lower cell. Move the cursor over the small square until a black cross appears. When this happens, hold down the left mouse button and drag the numbers down the page to your desired location.

EXAMPLE

Some Common Transcribing Errors

<i>Surname</i>	<i>Given Names</i>	<i>Title</i>	<i>Page</i>	<i>Comments</i>
Hanratty		Fr	1	
Kelly	T	Mr	1	
Stock	J	Mrs	1	
Kieran	M	Sister	1	
Andrew	M	Sister	1	
McKeefry	P. T. B.	Archbishop	2	<i>Omit full stops</i>
Hanratty	P. J.	Father	3	<i>Omit full stops</i>
Kelly	T		4	
O'Meara	J	Rev	5	
Augustine	M	Sister	5	
Borgia	M	Sister	5	
Johnston	W	Mrs	5	
Gleeson	Bill		6	
Augustine	M	Sister	7	
Rose	M	Sister	7	
Borgia	M	Sister	8	
Augustine	M	Sister	8	
Quinlan	E. M.		10	<i>Omit full stops</i>
McLeod	E D		10	
Clausen	H D		10	
Woods	Tenison	Reverend	11	
Redwood		Archbishop	11	
Kirk		Dean	11	
Fidelis		Sister	12	
Broughton		Father	12	
Shortall	T M		12	
Cahill	P	Rev. Father	13	<i>Omit full stops</i>

(Meehan) Josephine	M	Sister	13	Exceptions: <i>This is how these names appeared in the book, but they will not sort properly if entered this way.</i>
(Cooper) Benigna	M	Sister	13	
(Murphy) Bernadette	M	Sister	13	
Meehan	M Josephine	Sister	13	<i>Enter like this</i>
Cooper	M Benigna	Sister	13	
Murphy	M Bernadette	Sister	13	

Moreau		Father	15	
O'Meara		Father	15	<i>Correct use of apostrophe</i>
Redwood		Archbishop	15	
O'Shea		Archbishop	15	<i>Incorrect use of apostrophe</i>
Harnett		Father	15	
Whitaker		Father	15	
Adrian		Mother	17	
Kieran		Sister	17	
Hanratty		Father	17	
Kinsella	P	Rev Fr	31	
Crowley		Rev Fr	31	
Short		Mr (Mayor)	31	<i>Mayor' should be in the comments field</i>
Kelly	T	Mr	31	
Greening	J	Mr	36	

Key exactly as in the original - unless there are unusual characters in the surname field which will not sort correctly, as in the example above.

Saving Your Work

It is important to remember to save your work regularly as you go. It would be very disappointing to have done a number of hours indexing and something unforeseen happens (like the power goes off) and your data is lost. All your good work and time gone to waste!

Saving as you work:

- After completing 5 lines of work it is suggested you save your file.
- *Using Excel 2000® or Excel 2003®*
In the **File** menu click on **Save As** – this will bring up a dialogue box and at the top left hand side are the words “Save in” and the window will display the last used folder. The options are: choose this folder, select another folder using the drop down arrow *or* make a new folder by clicking on the “new folder” icon and giving it a new name, for example, Indexing.

At the bottom of the dialogue box are two windows – the first window has the words “File name” and a default name like “Book1”. Click into the window where Book1 is displayed and type a name for your file. This name should be as directed by your leader, or something to identify the work you are doing. Unless directed otherwise the second window “Save as type” the default type can remain. Click on **Save**.

- *Using Excel 2007®*
Click on the Office button (this is the round icon at the top left hand of your screen) then click on **Save As** – this will bring up a dialogue box. The left hand pane will display **Libraries** and under that **Documents** – click on **Documents**. Choose a folder from those displayed or make a new folder by clicking on **New Folder** and giving it a new name, for example, Indexing.

At the bottom of the dialogue box are two windows – the first window has the words “File name” and a default name like “Book1”. Click into the window where Book1 is displayed and type a name for your file. This name should be as directed by your leader, or something to identify the work you are doing. Unless directed otherwise the second window “Save as type” the default type can remain. Click on **Save**.

Making a copy on a Flash or Pen drive, or a floppy disk:

Insert your removable media (flash drive, pen drive, floppy disk, or other media) into the appropriate slot of your computer.

- *Using Excel 2000® or Excel 2003®*
Click on **File** and then **Save As**. In the **Save in** window use the drop down arrow to locate the drive where your media is located. The following are the usual names and locations on most computers:

Floppy disk	3½ Floppy (A:)
Flash / Pen drive	Removable Disk (E:) to (H:)

Click on the drive then give your file a name in the **File name** box and click **Save**.

- *Using Excel 2007®*
Click on the Office button then click on **Save As**. In the **Save in** window use the drop down arrow to locate the drive where your media is located. The following are the usual names and locations on most computers:

Floppy disk	3½ Floppy (A:)
Flash / Pen drive	Removable Disk (E:) to (H:)

Click on the drive then give your file a name in the **File name** box and click **Save**.