

SI TRAINING COURSE – TEST D2 (PRACTICAL): GRADES CRITERIA		
<i>N.B. At each grade there may be a different balance of problems affecting the grade: the index may be quite well constructed but lose more marks for the level of errors; or the index may have significant structural problems, or issues with coverage and representation of topics, but be highly accurate in other respects. The overall grade reflects a balance of these factors.</i>		
Grade	Construction of index	Accuracy and presentation
A–C grades: PASS		
A	<p>An excellent index of a very professional standard which provides comprehensive and easy access to the important themes and topics in the text. Standard principles and practices of indexing clearly understood and applied.</p>	<ul style="list-style-type: none"> No, or virtually no, avoidable errors and all instructions followed correctly.
B	<p>A good well-structured index providing suitable coverage of the text and user-friendly access to information.</p> <ul style="list-style-type: none"> Generally good keywords and entry formation, important topics present at main heading level, good decisions made about minor and passing references Subheadings, cross-references and double entry generally used well, locators accurate <p>Markers' comments might highlight a few areas that could benefit from further thought or improvement.</p>	<ul style="list-style-type: none"> Few, if any, avoidable errors in transcription, spelling, punctuation, filing order. Locators generally very accurate Instructions followed well Double entries matching.
C	<p>A basically competent index of commercially acceptable standard and showing some strengths. A few problem areas needing a little more revision work in the final stages of the course</p> <ul style="list-style-type: none"> Important themes mostly covered Most topics at main heading level; very few 'hidden' in subheadings or modifiers Heading construction mostly good – some improvement needed in places Subheadings used generally to good effect but possibly a few that are unnecessary, or others needed Cross-references and double entry mostly helpful to users, but possibly one or two useful ones missing, or some slight confusion over use in general Scattered topics mostly captured but possibly the occasional important reference missed Very minor references possibly in need of re-evaluation <p>Markers will highlight a number of areas to continue to work on and improve as more experience is gained.</p>	<p>There may be some problems here:</p> <ul style="list-style-type: none"> Some avoidable errors in transcription, spelling, punctuation and/or filing order Locators are likely to be accurate on the whole, but a few may need reconsideration Instructions mostly followed correctly.
D–E grades: FAIL		
D	<p>An index with some strengths but also a number of problems resulting in it not reaching Accreditation standard. Problems may include:</p> <ul style="list-style-type: none"> A few important or significant themes missing either as headings or as references missing from entries A few less-sought or weak entry terms included at the expense of more important terms A few problems with minor or passing references Wording of some entries needing to be either more succinct, better expressed or modified to give more context Some incorrectly used or missing subheadings, cross-references and double entries detracting from the usefulness of the index. <p>Markers will highlight specific problems and give guidance on areas to work on in order to improve and meet pass standard.</p>	<p>Likely problems:</p> <ul style="list-style-type: none"> A number of avoidable errors in transcription, spelling, punctuation and/or filing order suggesting the need for more editing and checking Inaccurate locators, e.g. too broad or too narrow, incorrect locator ranges, wrong locators for topic Instructions probably followed correctly but possible problems with interpretation.

E	<p>An index with serious problems which fails to provide adequate access to the text for the user. Poor knowledge or application of principles and practices as taught.</p> <p>Problems will significantly impact on the index and include some or all of the following:</p> <ul style="list-style-type: none"> • Poor engagement with the text: important topics missing as main headings or important references missing from entries • Poor choice generally of entry terms: less-sought or weak entry terms included at the expense of more important terms • Poor distinction between important and minor references resulting in arbitrary access to text content • Construction of headings poor, many needing to be either more succinct, better expressed or modified to give more context • Incorrectly used or missing subheadings, cross-references and double entries, substantially impacting on the usefulness of the index <p>Markers will advise on areas that need substantial revision and practice if the student is to resit.</p>	<p>Likely problems:</p> <ul style="list-style-type: none"> • Significant avoidable errors in transcription, spelling, punctuation and/or filing order, suggesting a more comprehensive editing and checking procedure needs to be developed • Inaccurate locators, e.g. too broad or too narrow, incorrect locator ranges, wrong locators for topic • Instructions may have been followed correctly but possible problems with interpretation.
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SI TRAINING COURSE – TEST D2 (PRACTICAL): COMMON ERRORS TO AVOID

The following errors are made frequently by students taking the D2 (Practical) Test paper, resulting in loss of marks. Avoiding these pitfalls will give you the best chance of success.

CHOICE OF ENTRIES

1. Major topics not covered in enough depth	While the metatopic may be obvious from the outset, it may be more difficult to identify all the other major topics in the text. But, as you work your way through the text, you may begin to see certain themes appearing frequently, or subjects which have a great deal said about them. The importance of major topics must be reflected in their coverage in the index. If you have only put a couple of locators after an entry that you feel is covered in detail, go back and find all the significant mentions. Major topics often have more than six locators, in which case subheadings will be necessary.
2. Adjacent headings that could be combined	If you find two or more adjacent headings in your index which begin with the same keyword, consider whether they are, in fact, discrete topics. In some cases, it is correct to keep two similar headings separate if they describe subtly different things, but if you had, for example, 'eBook indexing' followed by 'eBooks', these two headings should be combined. There is no overarching rule here – you have to use your judgment in each individual case. Think: are they essentially the same thing or not?
3. Major topics missing	This happens less often than 1. above, but it is still a common problem. Identifying and including major topics is much easier to do on the first reading when you are creating your initial draft index. If it looks significant, add it to the index. You can always remove headings if you change your mind about their importance.
4. Headings that are too general or non-specific to be sought terms	In your index there will be headings at different hierarchical levels, from specific, narrow terms to broader topics covering larger areas. This is fine but check that your headings aren't so broad as to be unhelpful and/or unsought.
5. Overcomplication of the metatopic	The metatopic should be used with caution in the index. It is acceptable to have entries under the metatopic if they could not realistically be placed elsewhere in the index. An overcomplicated metatopic entry can

	<p>waste space, or worse, hide significant topics that should be entered directly in a more appropriate part of the index.</p> <ul style="list-style-type: none"> • Identify the metatopic • Look at what entry (or entries) you have beginning with the metatopic • See if any of them contain words that could become the keyword (e.g. 'index layout' should be placed under 'layout') • Are there any subheadings under the metatopic heading that should be (or already are) main headings in their own right?
CONSTRUCTION OF HEADINGS	
6. Unsought or weak keywords	The first word of any main heading is key. Check each heading and see if you have placed the best word at the beginning. Is this where the reader will search, or is there another word within the heading that might be more sought? If you can't decide, perhaps a double entry is the answer.
7. Headings that are ambiguous because they are too short	You should always aim to keep your headings concise. Excessive wording clutters the index and makes it more difficult to scan. However, there needs to be enough context to make it clear what is being referred to. If you use a single word in a heading, consider whether that word has multiple meanings, and whether more than one of those meanings could be interpreted in the context of the text you are indexing. A brief modifier can be all that is required to resolve this problem.
8. Section headings that don't make suitable index headings	Section headings can be (and often are) your friend. Not only can section headings make your job easier as they neatly summarise the text below them in a suitably indexable form, but they also stand out for the index user who can match the wording of the index heading to the large font section title without having to work through the text. However, once again, judgment is required. Not <i>all</i> section headings make good index headings – often because they begin with an unsought word.
9. 'X and Y' headings that hide 'Y'	If you have a heading with the format 'X and Y', consider whether 'Y' should be a main heading. If X and Y are different things, then they probably shouldn't be combined in a single heading; if they are synonyms then they don't both need to be named in one heading. Instead, double entries for 'X' and 'Y' would be more suitable.
SUBHEADINGS	
10. Significant topics hidden as subheadings without a corresponding main heading	Essentially, this is a lack of direct entry – one of the key teachings of the course. Look at every subheading in your index and consider whether the reader might also search for this topic directly. It is fine to have subheadings for specific topics – often it is essential to make your broader heading complete but think about whether the subheading might <i>also</i> be a main heading. Don't hide important things.
11. Multiple subheadings with the same—or very few—locators (overanalysis)	<p>There are two main purposes of subheadings:</p> <ul style="list-style-type: none"> • To break up otherwise long strings of locators • To separate different senses of the main heading <p>In an entry with subheadings, compare the number of subheadings with the total number of locators. If there are more subheadings than discrete locators, you have almost certainly overanalysed the entry. Bear in mind the two purposes of subheadings above – can you justify the number of subheadings on either of these grounds?</p>
12. Unclear division between subheading topics (poorly analysed)	This is harder to fix than many of the other problems because your subheadings may make perfect sense to you. But, put yourself in the mind of the reader who sees the index for the first time and is

	unfamiliar with the text. Is there a vagueness/overlap in your subheadings, or is it clear what can be found under each one? It can help to write yourself a list of all the locators within an entry and summarise what information can be found at each locator. Then, categorise those different pieces of information into meaningful groups, which will then form your subheadings.
CROSS-REFERENCES AND DOUBLE ENTRIES	
13. Non-matching double entries	This is the most common error of all. If two terms are synonymous, even if they're used interchangeably in the text, they should have identical locators. This can be quite hard to spot in the editing stage, so making a note early in the process (or using your software to categorise topics) makes the job easier. The more obvious double entries are subheadings that are also a main heading (e.g. 'locators: strings' and 'strings of locators'). If you cross-check every subheading in your index against its corresponding main heading, you will pick up on non-matching double entries. It can't be overstated how often students lose marks for what should be an easy fix.
14. Omission of suitable <i>see also</i> cross-references	While you shouldn't litter your index with unnecessary cross-references (of either type), opportunities are often missed to help readers to find related topics. <i>See also</i> cross-references are a shorthand way of saying, 'If you are interested in this subject, you might also find something relevant and useful here'. If you identify two topics that are closely related, but which have (mostly) different locators, a <i>see also</i> cross-reference might be appropriate.
15. <i>See also</i> cross-references to the same locators	<p>This problem encompasses two possible errors:</p> <ul style="list-style-type: none"> • <i>See also</i> cross-references that lead to the same locators as the main heading • <i>See also</i> cross-references that lead to the same locators as each other <p>The following examples illustrate the two issues above:</p> <p style="padding-left: 40px;">anxiety 23–24, 105–111 <i>see also</i> stress stress 105–108</p> <p style="padding-left: 40px;">anxiety 23–24, 105–111 <i>see also</i> meditation; relaxation meditation 35–36 relaxation 35–36</p> <p>In the first example, the cross-reference is redundant because the reader is not directed to any new pages that they haven't already viewed. In the second example, one cross-reference is sufficient. The reader following both cross-references would be frustrated to find they were led to the same location twice.</p>
LOCATORS	
16. Important locators missing	There is a sliding scale of the relative importance of locators, and where it is a judgment call, this is considered in the marking of your test paper. However, where there is substantial information about a topic which appears in the index, this should be reflected in the list of locators. Of particular concern is where locators for minor mentions are present, but more major coverage is excluded. Check the relative importance of your locators and ensure that you aren't missing the more significant ones.
17. Inaccurate or mistranscribed locators	This is the most serious error with locators, because an inaccurate or incorrectly written locator renders that part of your index unusable. Worse, an inaccurate locator sends the reader to a place where they will search fruitlessly. If you have time in your checking process, follow every locator to ensure it is correct.

18. Locators incorrectly ordered (according to the instructions)	The instructions on how to order the locators are specific to the test. Read the test specifications carefully to ensure you understand where paragraph numbers and figure numbers should be placed in an entry.
INTRODUCTORY NOTE	
19. Too long – inclusion of unnecessary information	Space may be restricted in the back pages of a book and an overlong introductory note risks being cut out altogether by the publisher/editor. Only include the conventions that the reader might not normally expect, such as special types of locators.
LAYOUT, FILING ORDER, TRANSCRIPTION	
20. Style/spelling in the text not reflected in the index	At the D Module stage, it is rare for students to misspell words, but a more common error is using a different style or spelling from that in the text. Watch out for how words/phrases are italicised, capitalised, whether they have double or single quotes around them, US/UK spellings, etc. There may be more than one 'correct' way of transcribing an entry, but unless the text contains a definite mistake, follow the text. This is because you can assume that by the time you create the index, the text will have been standardised to the house style.
21. Filing order incorrect	A rare mistake in main headings, but check the order of subheadings and multiple <i>see also</i> cross-references as these are more likely to be missed in your checking procedure.