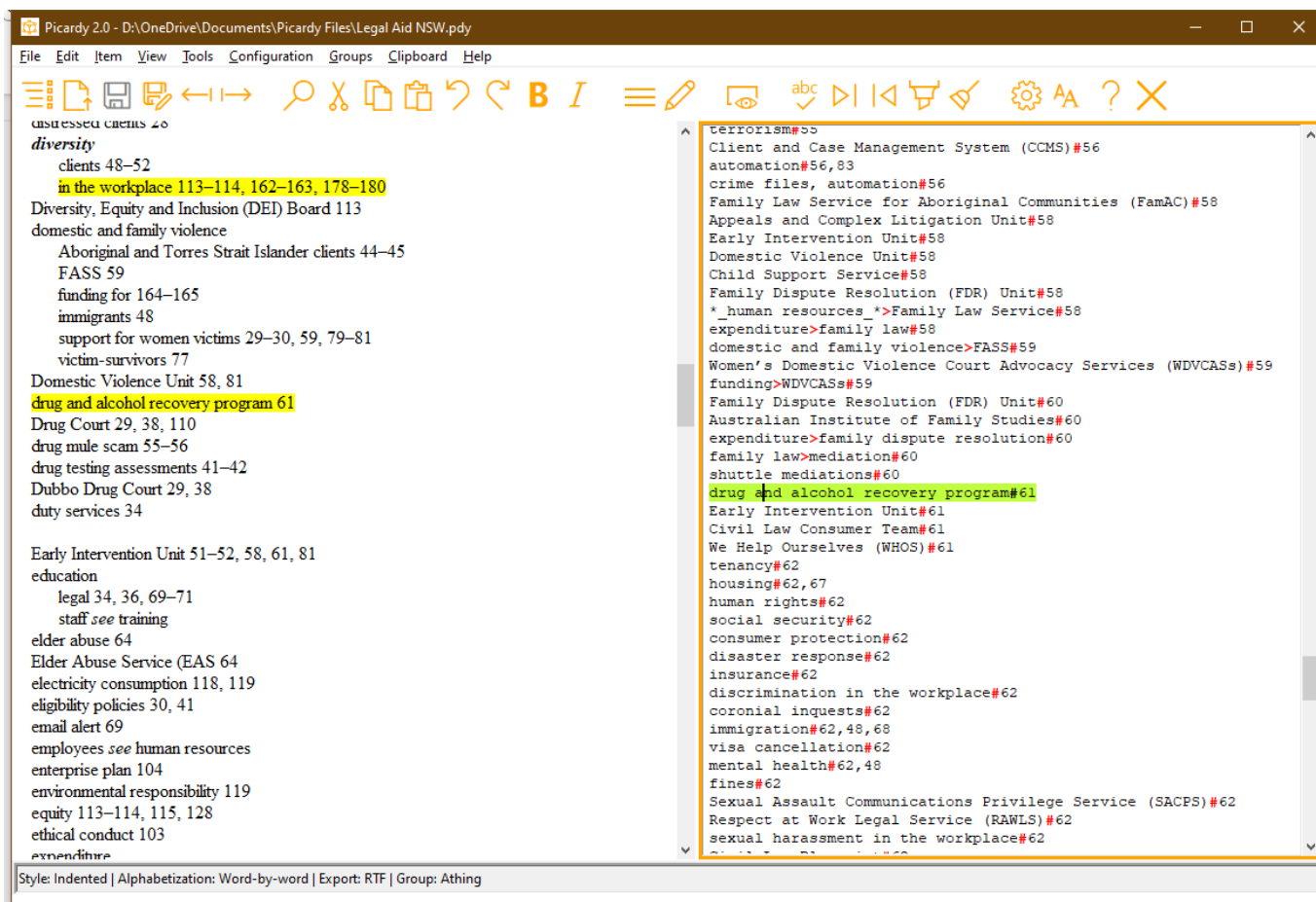# Picardy indexing software review

An appraisal

Picardy is free, freely distributable Windows and Linux software for creating, editing and formatting back-of-the-book indexes. Aimed at the "accidental indexer — self-publishing authors, academics, editors, librarians," (in fact anyone who has to create an index but for whom indexing is not a full-time career), it is a very simple, straightforward, totally text-based program, but for all its simplicity is surprisingly powerful.

Here I examine version 2.1, released in April. At the outset I need to declare that I was involved in testing early versions.

Presentation

The display consists of two resizable panes with a toolbar along the top and a status bar along the bottom. On the right is the Edit pane, showing the unformatted text file where all entry and editing is carried out. Each index entry or "item" is on a separate line. (An "item" is a single line of index data, which consists of a heading and optionally one or two levels of subheading, and one or more page numbers or a cross-reference.)

On the left is the Preview pane, showing the index formatted pretty much as it will print, displayed either in alphabetical order or in page number order. When the Edit pane is active it is enclosed by a thick coloured line; otherwise the Preview pane is active.

The current item is highlighted in both panes. Clicking on an item in one pane optionally displays it in the other pane. Depending on your settings, you can move between the items in either pane by clicking on the item or with a keystroke.

Data entry

Items can be added in either of two ways. They can be entered into a New Item dialogue, which transfers the data to the Edit pane upon Save:

Or they can be typed directly into the Edit pane, at any position, using simple formatting characters:

expenditure>family law#58

Notice that in the Edit pane a greater-than sign > indicates a subheading (up to two levels are permitted, sufficient for most indexes) and a hashmark # indicates a page reference; these characters have been mapped onto easily accessible keys. Moreover, an equals sign = indicates a "see" cross-reference and a plus sign + indicates a "see also" reference. The items can be typed in any order, and new items inserted wherever convenient, but normally they will appear in the order in which they are input. In addition, there are codes to copy the previous heading; although this is of little use while creating new indexes as almost all indexes are created in page number order, it could be useful when converting existing indexes. Since the Edit pane operates like a text editor, you can copy and paste text between items and carry out most operations of a text editor.

To apply styling to text you insert formatting characters in the same way, such as _underscore_ for italics, *asterisk* for bold and %PERCENT% for small caps; or alternatively select the text and apply the formatting with a keystroke.

As you type in the Edit pane or New Item dialogue, Picardy attempts to autocomplete the current word, using words that you have already entered. It ignores corrected mistypings. I found this feature imperfect and distracting, but it is easily deactivated.

"Abbreviations" are keyboard shortcuts that allow you type a few letters in the Edit pane or New Item dialogue, which are expanded into full terms in the Preview pane. This also allows you to enter characters otherwise reserved for special functions.

You can use accented letters and symbols from a limited selection of scripts by invoking a character map. Unicode characters can be pasted from other files or the Windows character map, as well as entered directly. Right-to-left text, such as Hebrew and Arabic, is supported.

Since the Edit pane acts like a text editor, text can be copied and pasted to any part of the index, or even between indexes. There is no limit to the length of an entry.

In addition to entering text directly into Picardy, you can create partial or even complete indexes using a text editor or word processor, and then paste them into the Edit pane. This allows the indexer to work when away from their primary computer, say on a laptop or a tablet, or contract out the data entry process.

Using the New Item dialogue, page references can be set to copy automatically from the previous item. In the Edit pane, a keystroke can create a new line with the previous item's page reference, ready for new text. Multiple page references can be attached to a single item, in any order. Sometimes it is easy to end up with messy location references, especially if you have been flipping records or merging indexes, so that if you end up with a string like "129, 129–136, 130, 131–132, 136", Picardy can automatically display it correctly as "129–136".

The choice of page reference or locator style is limited. For page ranges you can choose from the styles specified in *The Chicago Manual of Style* or in *Hart's Rules* ("Oxford"), or no compression; and for the range separator between a hyphen, an en dash and the word "to". Two-part page references such as volume number and page number are allowed for, including elision of repeated volume number, though the number of options is restricted, as is the range of characters allowed. Non-numeric locators or locators that begin with a non-numeric character such as "*inside front cover*", "*frontispiece*", "Plate 42" or "opposite 36" are not permitted.
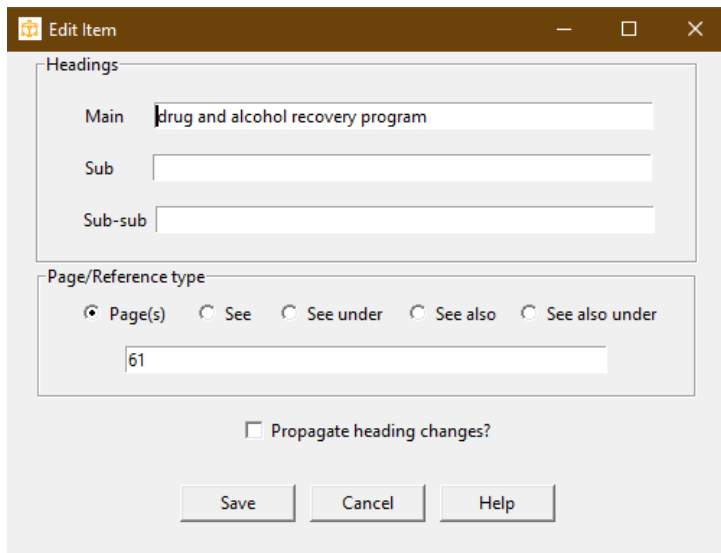
Hyperlinks for HTML indexes to websites and screen-based documents, such as PDFs and EPUBs, are entered as locators. A setting switches between displaying links in the same way as page numbers are displayed after the headings, or as bullet characters, and treating the headings as hypertext with the specified links as their targets. There is no need to generate the index to check the links as the targets can be accessed directly from Picardy.

By opening multiple Picardy instances, you can have as many indexes open simultaneously as your computer's memory permits. This allows, for example, for a name index and a general index to be created at the same time.

The copying and pasting of text from other applications, such as PDFs, is facilitated by tools to manipulate text on the fly, such as inverting names, splitting lists, adding quote marks, italicising, pluralising etc. Hotkey macros are available (as a separate download) to copy text from a PDF or word file and paste it into Picardy in a similar manner to Margaret Berson's Megabit Macros.
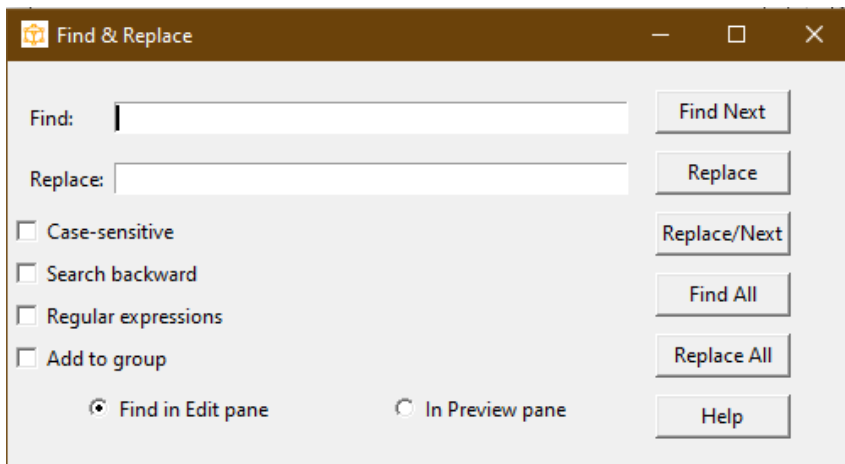
Editing

Editing is virtually a variation on adding items. You can type directly into the Edit pane, or use the Edit Item dialogue, which is similar in appearance to the New Item dialogue. Changes to an item can be propagated to items with identical headings, but having to use this dialogue to do so is a bit of a handicap.

To aid editing, the Edit pane can be displayed in either as-entered or alphabetical order, and the Preview pane can be displayed in alphabetical or page number order.

The find and find-and-replace functions are pretty standard and work just as in a word processor. Regular expressions (RegEx) are supported.

Navigating is a little tricky. Browsing directly to a heading is not straightforward and is restricted to the Preview pane: using the Find dialogue, you precede the term with a greater-than sign >.

It is easy both to split a heading into heading plus subheading and to join a subheading to a heading, by simply by adding or removing the > symbol in the Edit pane. You can also join a heading and subheading with a keystroke in the Edit Item dialogue. Duplicating records is easy, as is flipping headings and subheadings, and removing all subheadings from a heading altogether to leave only the locators.
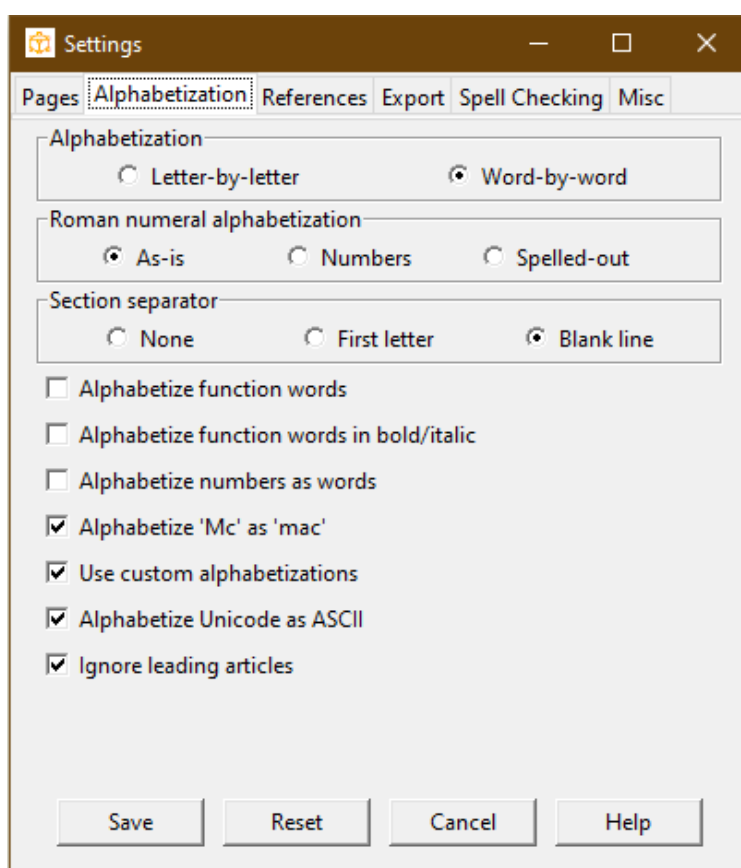
To duplicate an item, you can copy and paste as in a word processor; or you can use a keystroke to duplicate it, or to duplicate it while swapping the heading and subheading.

Text can be highlighted in a variety of colours, effectively operating like a Label feature. You can move between items highlighted with the same colour.

You can specify and save named groups of items in a variety of ways, such as by selecting and adding items individually, or by highlight colour, or via the search function. Any item can be assigned to any number of groups. Using groups you can create and export "sub-indexes"; however, you cannot group on locator to produce an index, say, to a single volume in a multivolume set.

Sorting

Alphabetisation can be word-by-word or letter-by-letter, with a few additional options.

Alphabetisation of individual entries can be overridden by incorporating coding to ignore characters in the alphabetisation or to alphabetise but not print.

Leading prepositions and conjunctions (or "function words") in subheadings can be ignored. You can also customise the sort order of subheading arrays.

Sort overrides for commonly used terms, numbers or symbols ("realphabetizations") are supported but are challenging to implement.

Letters with diacritics are optionally treated as their unaccented equivalent. Text in non-Latin scripts is alphabetised to its transliteration into Latin script, though this can be overridden.

Index management

The program ships with certain defaults, which are easy to change simply by changing the settings with no index saved.

Each index's configurations settings are stored as a separate file, leaving the index data as a raw text file. To work on an index on several computers, this file must be copied along with the index file. The configuration settings can be saved as a template and applied to new or existing indexes, a boon for in-house or contract writers who must adhere to a house style.

If you are working in collaboration with other indexers, you can import their work simply by copying and pasting. You can also import from and export to Cindex and SKY Index.

Whole indexes can be merged easily with a command. Parts of an index can also be merged by opening the index to be merged in a text editor, selecting the text to be merged, and pasting it into the Edit pane of the index to be merged into.

Spell-checking dictionaries are provided in seven languages. Terms can be added to an editable user dictionary.

Backups are automatic and are easily accessed.

Typing errors such as invalid page ranges can be flagged on the fly, while consistency errors such as missing cross-references can be detected via a batch validation function.

Brief statistical information is provided on the number of headings and subheadings.

Picardy does not lend itself to working easily on indexes to multivolume works, works in parts and periodicals. Moreover, the formatting of locator information is rather restrictive.

Syndetic structure

Cross-references can either be typed directly into the Edit pane using simple codes as described above or by using the New Item dialogue. Although the formatting options are somewhat limited, they are more than adequate for the majority of indexing tasks. Target errors are flagged in an error report.

Formatting

As you might expect, formatting options are confined to the displays found in most back-of-book indexes, and I dare say, in almost all indexes to single-volume trade books, teaching materials and technical documentation. You can choose between indented and run-in style, and between subheads in alpha or page number order, as well as page range separator and compression style.

As mentioned, locator formatting for multi-part works is very limited.

Output

Output choices are plain text, RTF, HTML and EPUB. For HTML and EPUB output, hyperlinks can be incorporated as explained above. Sub-indexes or portions of an index can be output using the groups feature described above.

To print a file in page order for proofing, you can print the contents of the Edit pane in either as-entered or alphabetical order. In addition, you can display the Preview pane in page number order and open it in a browser for printing.

Documentation

The Help file, although comprehensive, is, to my mind, not well organised. It appears to emphasise features that few indexers will use and to skip lightly over some essential tools. You can access context-sensitive help from each dialogue. It has a passable index. There is no separate manual or user guide.

Conclusion

Picardy is ideal for those who are obliged to create the occasional index as part of their job, and for authors forced to index their own work, as well as those contemplating a career in indexing. It automates many of the tedious aspects of indexing. It is easy to use and has a very brief learning curve.

For the time being, at least, professional indexers and those indexing complex works will likely continue to rely on high-end professional indexing software like Cindex and SKY Index. This may change as further features are added in future releases.

Michael Wyatt

People

Vale Jeanne Rudd

ANZSI sadly notes the passing of long-time member Jeanne Rudd in January 2024. Jeanne had been a member of AusSI/ANZSI since 1995. President Madeleine Davis' message of condolence on behalf of ANZSI, received this reply:

"I am Jeanne Rudd's sister-in-law … I want to thank you for contacting us to express condolences over her death.

This means a great deal to us as indexing was an important and much valued part of Jeanne's life. It is good to know that she was valued in turn by the indexing community.

Thank you again for your kind thoughts."

[name withheld. *Ed.*]