

Testing usability: ‘Experience an index usability test’ at the ASI Conference (Portland, 2009)

Cheryl Landes

Indexers from different backgrounds – technical and non-technical – prepared an index to the same non-technical text. Indexers at the 2009 ASI Conference in Portland were invited to test the two indexes for usability. How easily could they find in each the information they were looking for? The results were surprising.

Background

Back in January 2002, the ASI Pacific Northwest Chapter prompted by a discussion thread on INDEX-L¹ about mistakes in technical indexes, embarked on a project to compare how indexers from different backgrounds tackled the same task. This project is now in its third phase. In the first phase, we looked at how a technical and non-technical indexer indexed a beginner’s guide on using Microsoft Word. In the second phase, the same technical indexer and a scholarly indexer indexed a book of essays. (Samples from these two indexes are provided as Annex I and Annex II respectively.) In both cases, there were significant differences between how the two indexers wrote entries and structured the index.² For a comprehensive summary of these first two phases of the project, see <http://www.newenglandindexers.org/STC-06-Landes.htm>.

The third phase is a usability test on the book of essays, this book being chosen because the Word manual used in the first phase of the project was badly outdated. (Two new versions of Word had been released by the time we developed the usability test in 2006.) We have now conducted this third-phase usability test three times:

- Portland State University (PSU) in April 2007 at Ooligan Press, a student-run publishing house.
- Washington State University (WSU), Vancouver campus, in April 2008 at an advanced writing class.
- At an ‘Experience an index usability test’ session at the ASI Conference in Portland in April 2009.

Usability test design and results

Goals

The test aimed:

- to determine which index users find easier
- to examine how users search for information
- to examine to what extent readers can find information in the two indexes being tested.

The test

We asked participants to complete the following tasks:
Answer these five questions using the index:

1. In this book, the author reflects extensively about some of her camping trips. Where did she go camping?
2. Animals are another favorite topic in this book. The author spent a lot of time observing animals wherever she went. Where would you find information about her observations?
3. The author is closely connected to her family: her husband, children, and parents. Where would you find her discussions about these relatives?
4. Moods are described throughout this book, particularly the author’s observations of how feelings are evoked through nature. Where would you find information about this author’s observations?
5. The author devoted a fairly long passage in one chapter to wandering around for the sake of wandering around and the rewards that come from this activity. Where would you find this discussion in the book?

Rate each index on ease of use and relevance by answering 14 statements, rated on scale of 1 to 5:

- 5 – Strongly agree
- 4 – Agree
- 3 – Neutral
- 2 – Disagree
- 1 – Strongly disagree

Select the index that is easier to use.

1. Which index was easier to use? Why?

Comment on expectation of/need for an index in this book.

1. If you purchased this book, would you expect it to have an index? Why?
2. Does this book need an index? Please explain your answer.

ASI Portland Conference test results

The PSU and WSU test results can be found at <http://www.newenglandindexers.org/fall08sum.htm>. Here I report just on the ASI Portland Conference test, in which 14 indexers participated (all by definition professional indexers). We expected these indexers to find all entries for every question in each index, but this was not the case. And although most indexers stated that they preferred the scholarly index, they found more information in the technical index.

The indexers found entries for the camping trips, the author's relatives and animals in both indexes. One person struggled to find mood entries in the scholarly index, but nobody had any problems with this in the technical index. The task the participants found most challenging was to find entries for 'wandering around for the sake of wandering around'. (The term the author used was 'poking around'.) Two indexers could not find entries for this topic in the technical index, and nine could not find entries in the scholarly index.

Table 1 summarizes the indexers' success in locating entries.

Index preferences

Nine of the 14 participants who completed the test said they preferred the scholarly index over the technical version, and three preferred the technical index. (Author's note: Two of the indexers left early, so they did not complete this last questionnaire.) Their primary reasons were ease of use, readability, and better coverage. Here is a sample of comments:

Scholarly index:

- 'It was more concise and non-distracting, tighter. However, the second index had a more interesting quality to it, more detail.'
- 'It seemed cleaner, better coverage (e.g., has entry for

emotions) but I would think that this type of book would be difficult to index.'

- 'Easier to read. Entries were more in line with the way I think.'

Technical index:

- 'The technical index seemed more logical, but there were a few things I just couldn't find (moods). It felt a little overdone for a book of this kind.'
- 'The technical indexer's index offered some more logical subheadings. Especially under 'animals.' But sometimes it overanalyzed the subheadings.'
- 'There was more information under the camping entry to identify locations. I was able to locate the 'poking' around for wandering. It was easier to find things relating to the sensation of outdoor experiences.'

Interestingly, one indexer assumed that the scholarly index was written by a woman and the technical index by a man: 'Index#1 was 'warmer' (done by woman?) than the more analytical and 'cold' index #2 (done by man?).' (Author's note: Index #1 was the scholarly index and Index #2 was the technical index.) Both indexes were written by women!

Would readers expect to find an index in this book if they purchased it?

We expected a unanimous 'yes' response to this question (as professional indexers, wouldn't we automatically say that any non-fiction book needs an index, even if it's a collection of essays?) but the response was mixed. Of the 12 indexers who commented, five answered 'yes,' two said 'no,' one said 'probably,' and six said 'not necessarily.' Those who expected to find an index in this book said they would want to look up information they had read or to identify topics in the book. Those who did not expect an index said that books with essays or an author's recollections typically are not indexed. Their comments of those who responded 'probably' and

Table 1

Question	Number of indexers who found entries	
	Index created by scholarly indexer	Index created by technical indexer
In this book, the author reflects extensively about some of her camping trips. Where did she go camping?	14	14
Animals are another favorite topic in this book. The author spent a lot of time observing animals wherever she went. Where would you find information about her observations?	14	14
The author is closely connected to her family: her husband, children, and parents. Where would you find her discussions about these relatives?	14	14
Moods are described throughout this book, particularly the author's observations of how feelings are evoked through nature. Where would you find information about this author's observations?	13	14
The author devoted a fairly long passage in one chapter to wandering around for the sake of wandering around and the rewards that come from this activity. Where would you find this discussion in the book?	9	12
Total participants = 14		

‘not necessarily,’ are summed up by this quote: ‘Not necessarily, since it is so personal. I might not have any idea what to initially look up; however, after having read it, an index would be helpful to find information again.’

Does this book need an index?

As with the previous question, we expected all indexers to respond (as did one person) on the lines of: ‘Every book needs an index! (No, I really think so.)’ Again, the feelings were mixed. Of the 12 indexers who provided comments, five answered ‘yes,’ one said ‘no,’ and the rest were ‘not necessarily.’ Comments on situations in which an index would be helpful for this book are:

- ‘Yes, to find information quickly – chapter headings wouldn’t get you there easily. Helps map out underlying themes in author’s book that I’m sure the title/chapter headings don’t reflect. Browsing index really tells users about the book.’
- ‘So many things showed up in the book numerous times (animals, relationships with family) that it seems like it might be easier to just flip through the book. But certainly if you’re looking for something specific, it’s great.’
- ‘... it gathers information on topics that are difficult to find browsing.’
- ‘May be more necessary for secondary access (after having read it the first time) than on initial reading.’
- ‘... the only reason for someone to use this index is if he were to use the book as a teaching tool and wanted to refer to a specific topic. Otherwise, books which are just musings and opinions do not need (an) index.’

Conclusions

We have now conducted three usability tests with three groups of participants from different backgrounds. The PSU students had a background in publishing, while the WSU students did not. The indexers at the ASI Conference had an intimate understanding of the indexing process. The indexers found more information for each question than the students did. However, the PSU students found information in the indexes that the indexers did not. The PSU students also found more information than the WSU students; we attribute this to their exposure to publishing and the indexing process. Based on these observations, not only does an indexer’s background affect the way they write index entries and structure an index, but a reader’s background also affects whether they can find the information in the index. More research needs to be undertaken to determine whether there is a consistent pattern in our observations and what lessons there are to be learnt.

Notes

- 1 American online discussion group for indexers.
- 2 For good measure we also persuaded a new indexer to tackle the same text, although this index was not included in the usability test. For readers who wish to reflect on how a new indexer’s approach may differ from that of more experienced indexers, this index can be found at Annex III.

Cheryl Landes is an indexer and technical writer; Past-President and Program Committee Coordinator, PNW/ASI; and member, NEASI. Email:

Appendix I Index by a technical indexer

Numbers and Symbols

737 airplane, 113

A

abnormalities, sensitivity to one’s surroundings, 188–189

adaptation to the environment, 189

aging, 159–165

Aguajita Wash, hiking in, 93–99

airplanes, author’s flight to Cleveland, 113–114

airports

Phoenix, 87, 99

Portland, Oregon, 6, 113

Alamo Canyon Creek, seeking rattlesnakes at, 177–182

Alder Creek, 51, 154

alders, 128

algae, 41, 114

Alsea River, 109

ambiguity

in poetry, 170

in possibilities, 175

amphibians. *See individual*

amphibian names

anesthetic, 115

analgesic, 115

anger, from rattlesnakes, 179

animal tracks

bear, 77, 80–81

beetles, 85–86

cougar, 84

coyote, 82, 85

ravens, 85

animals

behavior of, 136–137

brains of, compared to humans, 184–185

encounters with, 184

fossils of, 17

homing instincts of, 7–8

mates, 25

naming of, 62

sensitivity to surroundings

by, 189

survival of, 137

See also individual animal names

Apollo, 171

apprehension, 62

Aristotle, 139

arroyo, 94

art of poking around, 31–37

Association of American

Colleges, 125

Astor, John Jacob Astor, 15

Athens, 172

Attica, 171

avocations, poking around as, 34–35

avoidance of death, 70

B

balance, joy and pain, 17, 20

bananas, 161–162

bass, 134–135

bats, 88

Bay of Islands, night canoeing in, 25–26

bays

Bay of Islands, night canoeing in, 25–26

Magruder, fishing for sturgeon in, 27–29

Bear Creek

camping at, 81–84

hikes into dunes at, 77–81

Bear Mountain, 51

bear tracks, 77, 80–81

bears, grizzly, 189, 191–192

beauty, people’s attraction to, 26–27

beaver dams, 128, 193

beavers, at Klickitat Creek, 128

beds, Olaus’, 54

bees, homing instincts of, 8

beetle tracks, 85–86

behavior, animals, 136–137

Berry, Wendell, 53

Berthoud Pass, 23–24

Beston, Henry, 53

Beth (author’s dance instructor), 101–103, 106, 107, 108

Bible verses, selecting for author’s father’s funeral, 150–151

Billy Chinook lake, 72

birds

homing instincts of, 8

- naming of, 60
 ouzels as, 44
 See also *individual bird names*
- birthdays, author's poking around on, 34
- bitterroot, 61
- blimps, attack England, 4
- blue herons, 134–135
- Boeing 737 airplane, 113
- bombings, in England, 4
- brains
 animal compared to human, 184–185
 newts during mating, 132–133
- Brauner (author's professor), 168–169
- break-walls, 168, 169
- bridges, Three Springs, 14
- bronchiectasis, 69
- Brooks Range, 54
- Buck Creek, 153
- bugs. See *individual insect names*
- C**
- caches, water, 96
- cactus, 87–88
- caddisflies, life changes in, 141–142
- camping
 along Willamette River, 3, 8–9, 11
 at Bear Creek, 81–84
 at Berthoud Pass, 23–24
 as domestic experience, 53–54
 on Smohalla River, 51–53, 167–169, 170–171, 173
 in Sonoran Desert, 89–93
- camping equipment, color coding, 52
- cancer, battles with, 110–111
- canoeing
 at Bear Creek, 78
 on Clackamas River, 163
 at night, 25–26
- canyon wrens, 18
- canyons
 Grand, 46, 54, 111–112
 Hell's, 109
- carols, Christmas, 6, 7
- Cascade Mountains
 Metolius River, 72–73
 skiing at Fawn Lake, 57–58
- cases, caddisfly, 141–142
- Cassiopeia, 22, 26
- children
 admiration of creations by, 145
 adults feeling like, 161
 homing instincts of, 8
 letting go of, 119–125
 naming rituals of, 62
 replacing elderly in neighborhoods, 164–165
 singing with, 122–123
 talents for poking around by, 33–34, 35
- chinook salmon, 154
- Christmas carols, 6, 7
- churches, Presbyterian, 101
- Cincinnati, 113
- Clackamas River, Lillian recalls canoeing on, 163
- clarity
 after river silt settles, 168
 of the air, 187–188
 defined, 174–175
 in philosophy, 170–171, 172–173
 seeking in Greece, 171–172
- Clark, Captain, 61
- Clarkia amoena*, 61
- classes (college-level), *Metaphysics and Epistemology*, 168–169
- classes of rapids, 110
- classification of things, 59–64
- Cleveland, 5–7, 113–114
- cloaca, 132, 133
- coachwhip snake, 99
- Coffee Pot, 109
- coho salmon, 154
- color coding, camping equipment, 52
- Colorado, Berthoud Pass, star gazing at, 23–24
- Colorado River, 111–112
- colors, rainbow trout, 144
- Columbia River, Day and Crook captured at, 15
- connection, sense of, 104–105
- consciousness, in snakes and toads, 186
- contentedness, in tranquility, 14–15
- continuous rivers, 109
- cookbooks, 161
- Coos Bay, deaths in, 135
- Coquille Indians, poison used by, 134
- corroboration, seeking at Salish River, 149–156
- cougar tracks, 77, 84
- country music, 12, 16
- country-western dancing, 101–108
- courage, failures in, 174–175
- courtship, of newts, 130–134, 136–139
- Cow Slough Bay, 81
- “Cowboy Lullaby”, 94
- Cowboy Waltz, 106
- coyote tracks, 82, 85
- coyotes, 83
- crayfish, 83
- creation, acts of, 144–145
- creationists, on Earth's age, 46–47
- creeks
 Alder, 51, 154
 Buck, 153
 Klickitat, 127–128
 Panther, 61
 Skookum, 143–147
- Crooks, Ramsey, 15
- crossing rivers, author's dislike for, 42
- Cunard Line, 5
- currents
 crossing when strong, 41–43
 trout's ability to resist, 50
- cutthroat trout, 153–154
- Cuyahoga River, 5–6
- D**
- damage, to Earth, 71–72
- dams, beaver, 128, 193
- dance floor etiquette, 102–103
- dancing, country-western, 101–108
- daughters, letting go of, 119–125
- Day, John, 15, 20
- DC-10 airplane, 113
- Dean (dance student), 105–106
- deaths
 author's mother, 69–71
 from eating newts, 134
 life after, 150–152
- deer, fawn gets close to Erin, 82
- deer mice, 77–78
- deer tracks, 86
- Delphi, 171
- Delta Airlines, 113
- Denali Highway, 192–193
- Descartes, René, 168–169, 171, 172–173
- Deschutes River
- drift mile 17, 141–142
- drift mile 19, 142–147
- drift mile 28, 148
- deserts
 Great Basin, 89
 Sonoran
 camping in, 89–93
 hiking in Aguajita Wash, 93–99
- desires, for different life, 107–108
- Devil's Staircase, 109
- Diamond (town), 111–112
- dihydrotestosterone, 132
- dippers, 44, 47
- dishes, singing while washing, 123
- distractions, golden eagles, 16
- Doc (herpetologist), 180
- dog handlers, 35
- dogs, training of, 35
- dolls, naming, 62
- domesticity, in the wilderness, 53–54, 58
- doves, 92
- drawings, creature composites, 146
- dread, 10
- drivers of trucks, nicknames of, 63
- drives, to John Day River, 12–13
- ducks, rearing of young by, 119–120
- dunes, Bear Creek, 77–81, 83–86
- dusky-footed wood rats, 56
- E**
- eagles, golden, 16, 98–99
- Earth
 as a mother, 67–69
 age of, 46–47
 whole vs. damaged, 71–72
- eating, deaths from, 134–135
- Ecclesiastes 3, 150–151
- education. See *learning*
- eggs
 newts, 132, 134
 toads, 183
- Einstein, Albert, 46
- elderly, taking to nursing homes, 159–165
- elevation changes, pool-drop rivers, 109
- Emerson, Ralph Waldo, 17
- emotions
 in muscles, 182
 in snakes and toads, 186
- emptiness, 152
- enemies
 of newts, 135
 of poking around, 35
- England, 3–5
- environment, sensitivity to, 187–193
- equilibrium
 dippers' method for maintaining, 44
 joy and pain, 17, 20
- equipment for camping, color coding, 52
- Erin (author's daughter)
 author sings to, 124–125
 camping trips
 along Willamette River, 3
 on Smohalla River, 52
 catches lizard, 93–94
 caught in storm, 49–50
 crosses Little Stoney River, 44
 fawn moves next to, 82
 finds ancient pottery, 97
 finds missing forks, 92
 fishes for trout, 48
 learns names of things, 60–61
 morning camping rituals of, 11
 rolls down dune, 81
 sings with author, 9
 spends time with boyfriend, 119, 125
 talents for poking around, 33
- Eros, 22
- erosion, 46–47
- escapism, from life, 107–108
- estrogen, 134
- eternal life, 62
- ether, 115
- etiquette, dance floor, 102–103
- evening primroses, 61
- excitement, effects on pain, 14
- eyes, big, 103
- F**
- Faculty Wives, 164
- failures, in courage, 174–175
- falling stars, 26
- falls. See *waterfalls*
- family rituals
 at Christmas, 6–7

- naming things, 61–62
 father (author's)
 author's phone call to, 16, 20
 battle with cancer, 110–111
 copes with wife's illness, 69–70
 flight to home of, 113–114
 as taxonomist, 59–60
 visits Metolius River at night, 73
 Fawn Lake, skiing at, 57–58
 fawns, 82
 fear, 10, 62, 94, 147
 fields, of horsetails, 32–33
 Fields, Reubin, 61
 Fifth Ice Age, 45
 fish runs, as time marker, 153–155
 fish. *See individual fish names*
 fishing
 for sturgeon, 27–29
 trout, 48, 142–144, 147–148
 fishing flies, 142–145
 fitness, 137
 fitting in, 104–105
 Fletcher, Colin, 53–54
 flies, fishing, 142–145
 flights, to Cleveland, 113–114
 flying
 compared to rafting, 114–115
 learning to, 113–114
 folk songs, Scottish, 4
 forks, lost, 92
 Fort Vancouver, Day dies at, 15
 fossils, 17
 Fourth Great Melting, 45
 foxes, 25
 Frank (author's husband)
 camping trips
 along Willamette River, 3
 on Smohalla River, 51–53
 caught in storms
 at Little Stoney Gorge, 49–50
 in Sonoran Desert, 91
 crosses Little Stoney River, 41–43
 drives to John Day River, 12–13
 finds dead rattlesnake, 169–170
 finds water packs, 96
 fitting in at country-western dance class, 104–105
 gazes at stars at Berthoud Pass, 23–24
 hikes Little Stoney Gorge, 48–49
 laughs at bear tracks, 80–81
 maneuvers through rapids, 18–19
 returns to Bear Creek, 84–85
 skis at night along Rogue River, 21–22
 studies newts at Klickitat Lake, 135–136
 views about love by, 24–25, 27
- frogs, 182–184
- G**
 garter snakes, 7–8, 135
 Genesis (book of Bible), 62
 Gila monsters, 95–96
Gilligan's Island, 57
 glaciers, 42–43, 187–188
 goats, mother's love for newborns, 24–25
 God, name of, 63
 golden eagles, 16, 98–99
 gorges, Little Stoney, 43–44
 gramophone recordings, 160–161
 Grand Canyon, 46, 54, 111–112
 grandfather (author's), 4–5
 grandmother (author's), 5
 great blue herons, 134–135
 Greater Cincinnati Airport, 113
 Greece, 3, 171–172
 Greeks, view about love, 24
 grizzly bears, 189, 191–192
 ground squirrels, 189
 growing old, 159–165
 gulls, 99
- H**
 hair, big, 103
 handles, 63
 happiness
 balancing with sorrow, 17–18, 20
 at end of child-rearing process, 121
 in the morning, 173
 origin of, 19–20
 rivers as, 14–15
 Harney Rapids, 14, 17–20
 Hartman, Reverend, 150–151
 hats, wearing while dancing, 103
 healing, Earth's ability to, 71–72
 Helen of Troy, 22
 Hell's Canyon, river types in, 109
 herons, 73, 134–135
 highways, Denali, 192–193
 hiking
 in Aguajita Wash, 93–99
 in Alamo Canyon, 177–186
 compared to poking around, 32
 at Little Stoney Gorge, 45, 48–49
 Hinckley Lake, author's poking around at, 34
 Hobbes, Thomas, 182
 hobbies, poking around as, 34–35
 Holy Land, 35
 homing instincts
 driving forces behind, 9–11
 snakes, 7–8
 hoping
 as poking around activity, 33
 untold, 147
 hormones, 132–133
 horsetails, fields of, 32–33
 house-playing, in the woods, 52–58
- hummingbirds, 95
 hummocks, 192, 193
 hypersensitivity to the environment, 187–193
- I**
 Ice Ages, 42–43, 45, 49
 Idaho border, Day and Crooks abandoned at, 15
 ideas, as philosophy, 169
 identities, 36, 59–64
ilira, 62
 Indians, Coquille, 134
 insight, birth of, 36
 instincts
 homing, 7–11
 nursing, 64–66
 intercourse, newts, 130–134, 136–139
 Intermediate Dance class (country-western), 105–108
 Inuit, naming of things by, 62
 "Irish Blessing" (song), 9
 Islands, Bay of, night canoeing in, 25–26
- J**
 jeans, 103–104
 Jefferson, Mount, 72
 Jensen Hall, 163
 Jensen, Mr. (author's neighbor), 163
 John Day River
 discovery of, 15
 drive to, 12–13
 rafting on, 14–15, 17–20
 river type, 109
 Jonathan (author's son)
 author sings to, 124–125
 builds first treehouse, 54–56
 camping trips
 along Willamette River, 3
 on Smohalla River, 51–53
 caught in storm, 49–50
 draws creature composites, 146
 favorite toy of, 146–147
 finds animal tracks, 84
 fishes for trout, 48, 142–144, 147–148
 learns names of things, 60–61
 maneuvers through rapids, 18–19
 rolls down dune, 81
 stalks lizards, 90
 talents for poking around, 33–34
 ties trout flies, 144–145
 joy. *See* happiness
- K**
 kangaroo rats, 92
kappia, 62
 kid goats, mother's love for newborns, 24–25
 Klickitat Creek, 127–128
 Klickitat Lake
 formation of, 127–129
- newts at
 enemies of, 135
 mating of, 130–134, 136–139
 migration of, 129–130
 study of, 135–136
 Kraft Street (Cleveland), 55
- L**
la nauste, 10
 Lake Billy Chinook, 72
 lakes
 Hinckley, author's poking around at, 34
 Klickitat
 formation of, 127–129
 newts at, 129–139
 landing, airplanes, 113
 Lao Tzu, 137
 large-mouth bass, 134–135
largo, 47
 larva, 142, 147
 Lava Falls, 111–112
 laying eggs, 132, 183
 learning
 dog training, 35
 to fly, 113–114
 Metaphysics and Epistemology class, 168–169
 by poking around, 36
 songs, 122–123
 Lee's Ferry, 111
 Lemhi Park, 154
 Levis jeans, 104
 Lewis, Meriwether, 61
Lewisia rediviva, 61
 life
 after death, 150–152
 escaping from, 107–108
 eternal, 62
 ideas and, 169
 purpose in, 139
 simplicity in, 172–173
 life changes, caddisflies, 141–142
 Lillian (author's neighbor), 159–165
 lily pads, on Klickitat Lake, 128
 liquid, dunes as, 79
 lists of species
 in Aguajita Wash, 93–99
 at Phoenix Airport, 88–89
 at Sonoran Desert campsite, 89–93
 Little Current, 25–26
 Little Stoney Gorge, 43–44
 Little Stoney River, crossing strong currents in, 41–43
 lizards, 90, 93–94, 95–96
 Locke, John, 36
 lodgepole pines, naming of, 61
 logic, sand dunes, 85–86
 loons, 193
 love
 definition and purpose of, 24–25
 falling into, 21–22
 Greeks' view about, 24
 how it starts, 26–27
 letting go of children, 121

lunatics, 190

M

Maclaren Glacier, 187–188

Maclaren River, 190–192

magic, creation as, 145

Magruder Bay, fishing for sturgeon in, 27–29

Man Who Walked Through Time, *The* (Fletcher), 53–54

manners, on dance floor, 102–103

markers

for rocks, 167

of time, 153–155

marriages, growing together in, 21–22

Marty (author's dance instructor), 101–103, 106–107

Mary (dance student), 105–106

mates, animals, 25

mating, of newts, 130–134, 136–139

McKenzie River Trail

classifying plants along, 59–60

nameless things on, 64

Medea, 22

memories, private stores of, 36

men

as lunatics, 190

roles of in country-western dancing, 102–103

women outliving, 163–164

men, domesticity of, 53–54

Metaphysics and Epistemology class, 168–169

mice

deer, 77–78

pocket, 91–92

Middle Ages, poking around during, 35

migrations, newts, 129–130

Miles (Frank's graduate student), 135–136

Mill, John Stuart, 14–15

minnows, 193

Mitchell (town), 16

mold, slime, 63

Monroe, Marilyn, 137

moon, clarity in, 174

mornings

at Bear Creek dunes, 79

camping rituals during, 11

happiness in, 173

morphine, 115–116

mosquitoes, 192

mother (author's)

childhood memories of, 4

death of, 69–71

heritage of, 3–4

mothers

admiration of children's

creations by, 145

Earth as, 67–69

goats, love for newborns, 24–25

letting go of children, 119–125

nursing instinct, 64–66

wood ducks, rearing of young by, 119–120

mountains, as movement over time, 47. *See also individual mountain names and ranges*

Mt. Jefferson, 73

Muir, John, 190, 192

Murie, Margaret, 54

muscles, emotions in, 182

music. *See* songs

muskeg, 192

N

naming things, 59–64

National Road (Greece), 172

nests

dusky-footed wood rats, 56

swans and ptarmigans, 25

wood rats, 92

neuropeptides, 133

neurotransmitters, 133

newts

enemies of, 135

mating of, 130–134, 136–139

migration of, 129–130

poisonous nature of, 134–135

study of, 135–136

nicknames, truck drivers, 63

night

canoeing at, 25–26

finding sidewinders at, 97–98

headwaters of Metolius River at, 73

skating at, 190

snow scenes at, 21–22

star gazing at Berthoud Pass, 23–24

sturgeon fishing during, 27–29

North American plate, 43

North Fork of Alsea River, river type, 109

North Sea, 3

Northern Lights, 24, 29

novocaine, 115

nursing homes, taking elderly to, 159–165

nursing instinct, 64–66

nutcrackers, naming of, 60

nymphs, 142, 147

O

observation, results of, 147

oceans, Pacific, 43, 61

Ochoco Mountains, 16

Ohio

author and Frank decide to leave, 5–6

author's parents move to, 5

author's poking around in, 34

author's treehouse in, 55

oil slicks, on Cuyghoga River, 5–6

Olaus' bed, 54

Old Testament, 150–151

Olson, Sigud, 190

Ontario

Bay of Islands, night canoeing in, 25–26

Magruder Bay, fishing for

sturgeon in, 27–29

opossums, 64–66

Oregon

author moves to, 6

dancing Texas Two-Step, 101

Oregon Agricultural College, 163–164

Oregon State University, 163–164

Oregonians, as newts' enemies, 135

Orion, 24

orphans, goats, 24–25

otters, river, 80

outdoors, domesticity in, 53–54, 58

ouzels, 44

ovaries, 133–134

P

Pacific Ocean, 43, 61

packs, water, 96

pain (emotional)

balancing with joy, 17–18, 20

compared with physical pain, 116

Day's experiences with, 15

effects of excitement on, 14

pain (physical), 115–116

Painted Hills, 16–17

pallid bats, 88

Panther Creek, 61

panthers, 61

parents, as enemies of poking

around, 35

parks, Lemhi, 154

patience, of ticks, 48

permafrost, 191

Perseus, 26

philosophy

clarity in, 170–171, 172–173

as ideas, 169

Phil 546: Metaphysics and

Epistemology class, 168–169

Phoenix airport, 87, 99

pigeons, homing instincts of, 8

pinus, lodgepole, 61

Pinus contorta, 61

pioneers, homing instincts of, 10

pizzicato, 47

planes, author's flight to

Cleveland, 113–114

plants

classifying, 59–60

in Sonoran Desert, 89–90

plates, North American, 43

pocket mice, 91–92

poetry, ambiguity in, 170

poison, newts as, 134–135

poking around

as author's treat, 34

as an avocation, 34–35

characteristics of people who

engage in, 31–32, 33–34

by children, 33–34

compared to other activities,

32

definition of, 36

for education, 36

enemies of, 35

other activities conducted

during, 33

value of, 36–37

polliwogs, 183–184

pool-drop rivers, 109–110

Portland (Oregon) airport, flights to and from, 6, 113

possibilities, ambiguity in, 175

possums, 64–66

pottery, 96

prairie, 10

Presbyterian Church, 101

pride, in creation, 145

primroses, evening, 61

Prineville, 13

progesterone, 134

prolactin, 133

Protista, 63

ptarmigans, 24, 25

Puget Sound, views of, 120–122

Pythias, 171–172

Python, 171–172

Q

quicksand, 78, 80

R

raccoons, 135

rafting

on John Day River, 14–15, 17–20

on Smohalla River, 167

through Grand Canyon, 111–112

rain, 155

rainbow trout, colors of, 144

Rainie Falls, 109

rapids

Harney, 14

ratings of, 110

Tyee, 109

Wildcat, 109

rats

kangaroo, 92

wood, 56, 92

rattlesnakes, 177–182, 184

raven tracks, 85

recollections, private stores of, 36

recordings, gramophone, 160–161

relationships, building of, 21–22

relief, 12

reptiles. *See individual reptile names*

restlessness, 44

rituals

at Christmas, 6–7

Erin's morning camping

routine, 11

naming things, 61–62

river crossing, author's dislike for, 42

river otters, 80

riverbeds, Aguajita Wash, 93–99

- roadkills, adding to species list, 89
- robins, 11
- rocks, solidity of, 45
- rodents, root word for, 47. See also individual rodent names
- Rogue River
- author's night skiing trip along, 21–22
- river type, 109
- S**
- safety, in the wilderness, 53–54, 58
- salamanders, homing instincts of, 8
- Salish River, search for corroboration at, 149–156
- salmon, as time markers, 154–155
- sand dunes, Bear Creek, 77–81, 83–86
- sandpipers, 80
- Santiam Pass, 72
- Sartre, 10
- Sartwell, Mrs. (author's neighbor), 164
- Scotch broom, 78
- Scottish folk songs, 4
- scriptures, selecting for author's father's funeral, 150–151
- scuplins, 80
- seasons
- changes in, 153–155
- for everything, 150–151
- security, in the wilderness, 53–54, 58
- "seeing the elephant," 10
- seismographs, as measurement of time, 47
- sense of connection, 104–105
- sensitivity to the environment, 187–193
- Service Creek, 17
- sex, newts, 130–134, 136–139
- 737 airplane, 113
- shadows, water striders, 173
- shapes, landforms, 79
- Sheep Mountain, 96
- ships, Cunard Line, 5
- shipyards, in England, 4–5
- shrews, vagrant, 78
- sidewinders, 97–98
- Sierra Mountains, 190
- simplicity, in life, 172–173
- singing
- with children, 122–123
- to children, 124–125
- during author's childhood, 123–124
- skating, at night, 190
- skiing
- at Fawn Lake, 57–58
- at night, 21–22
- Skookum Creek, 143–147
- slicks of oil, on Cuyahoga River, 5–6
- slides, 45
- slime mold, 63
- slowpokes, 35
- Smohalla River, camping on, 51–53, 167–169, 170–171, 173
- snails, 114
- Snake River
- Day and Crooks abandoned at, 15
- river type, 109
- snakes
- finding at night, 97–99, 177–182
- homing instincts of, 7–8
- thinking like, 185–186
- See also *individual snake names*
- snow, picnics in, 6–7
- snow scenes, at night, 21–22
- Socrates, 26–27, 171
- solidity, of time, 45
- songbirds, homing instincts of, 8
- songs
- Christmas carols, 6, 7
- country, 12, 16
- "Cowboy Lullaby", 94
- by dippers, 47
- gramophone recordings, 160–161
- "Irish Blessing", 9
- mountains' movements as, 47
- Scottish, 4
- by wood ducks, 120
- See also sounds
- sonograms, 47
- Sonoran Desert
- camping in, 89–93
- hikes in Aguajita Wash, 93–99
- sorrow, balancing with happiness, 17–18, 20
- sounds
- from rattlesnakes, 178
- from water, 181–182
- See also songs
- spawning salmon, 154–155
- species lists
- in Aguajita Wash, 93–99
- at Phoenix airport, 88–89
- at Sonoran Desert campsite, 89–93
- sperm, 131–132, 133–134
- spoons, lost, 92
- spring, in Sonoran Desert, 89–90
- squirrels, ground, 189
- star gazing, Berthoud Pass, 23–24
- stars, falling, 26
- steelhead salmon, 154
- steroids, 133
- Steve (Erin's boyfriend), 121
- stones, slippery, 41
- storms
- effects on lodgepole pines, 61
- human need to seek, 58
- at Little Stoney Gorge, 49–50
- in Sonoran Desert, 91
- streams, time as, 43
- streets, Kraft (Cleveland), 55
- strength, river currents, 41–43
- strides, in Texas Two-Step, 101
- strolling, compared to poking around, 32
- sturgeon, fishing for, 27–29
- sundogs, 98
- sunsets, watching from Bear Creek dunes, 83–84
- surf, 79
- survival, animals, 137
- Susan (author's friend), floats through Grand Canyon, 111–112
- swallows, 18
- swans, tundra, 25
- Swiss Family Robinson's treehouse, 56
- T**
- taiga, 190–192
- Taricha granulosa*. See newts
- taxonomies, 59–64
- testosterone, 132
- tetrodoxin, 134
- Texas Two-Step, 101
- thinking, like snakes and toads, 185–186
- Thoreau, Henry David
- author's father reads from, 71
- as domestic creature, 53
- on poking around, 32, 35, 37
- on time as a stream, 43
- Thornaby-on-Tees, 3–5
- Three Springs Bridge, 14
- thunder, at Little Stoney Gorge, 49–50
- ticks, 46–47
- Tidewater, 154
- time
- as a stream, 43
- as constant, 46
- doing nothing every day, 161–162
- for everything, 150–151
- fish as markers of, 153–155
- lack of, 42–43
- mountains as movement over, 47
- solidity of, 45
- toads, 182–184, 185
- tracks
- bear, 77, 80–81
- Bear Creek, 77, 80–81, 82, 84, 86–87
- beetles, 85–86
- cougar, 84
- coyote, 82, 85
- deer, 86
- ravens, 85
- traditions, at Christmas, 6–7
- training. See learning
- tranquility, contentedness in, 14–15
- travel, in Texas Two-Step, 101
- treehouses, 54–57
- trees. See *individual tree names*
- trout
- as a life lesson, 50
- fishing for, 48, 142–144, 147–148
- as time markers, 153–154
- trout flies, 142–145
- Troy, 22
- truck drivers, nicknames of, 63
- truth, finding by poking around, 36
- tundra swans, 25
- Tyee Rapids, 109
- tying trout flies, 144–145
- U**
- Umpqua River, river type, 109
- uplift, 46–47
- V**
- vagrant shrews, 78
- vastocin, 134
- verses from Bible, selecting for author's father's funeral, 150–151
- W**
- walking, compared to poking around, 32
- Walking* (Thoreau), 37
- Wallowa Mountains, Day's and Crook's attempts to survive in, 15
- Walter (Lillian's husband), 164
- waltzes, Cowboy, 106
- warblers, 79
- warnings about bears, 191–192
- washing dishes, singing while, 123
- wasps, homing instincts of, 11–12
- watching, compared to poking around, 32
- water, as change agent, 174
- water caches, 96
- water striders, 173
- waterdogs. See newts
- waterfalls
- Lava, 111–112
- Rainie, 109
- in river ratings, 110
- Westhills Manor, 160
- wholeness, of Earth, 71
- Wildcat Rapids, 109
- wilderness, domesticity in, 53–54, 58
- wildflowers, naming of, 61
- Willamette River
- author's first encounter with, 6
- camping trip along, 3, 8–9, 11
- river type, 109
- Willamette Valley, author moves to, 6
- willow ptarmigan, 24
- Wilson, Mrs. (author's neighbor), 164
- wind, 79, 155–156
- Windows (dance), 106
- Winter Creek, poking around at, 31–37
- wolves, 189
- women
- as domestic creatures, 53

- as lunatics, 190
 outliving men, 163–164
 roles of in country-western dancing, 102–104
 wondering, as poking around activity, 33
- wood ducks, rearing of young by, 119–120
 wood rats, 56, 92
 woodpeckers, naming of, 61
 woods, house-playing in, 52–58
 World War I, bombings in
- England, 4
 wrens, canyon, 18
- Y**
yhwh, 63
 Yorkshire, 3–5
- youth, feeling like, 161

Z
 zeppelins, 4

Appendix 2 Index by a scholarly indexer

In this index, **bolded** page ranges indicate a chapter heading.

- A**
 Aguajita Wash, **87–99**
 Ajo Mountains, 177
akrasia, 121
 Alamo Canyon, 177–179
 See also Sonoran Desert
 Alamo Canyon Creek, **177–186**
 Alaska, 189–193
 Alder Creek, 51, 154
 Alsea River, North Fork, 109
 Anasazi Indians, 57
 animal behavior, understanding, 136–138, 184
 animals
 Aguajita Wash, 93, 94, 95–96
 Alamo Canyon, 177–179
 Alamo Canyon Creek, 182–183
 Alaska, 193
 Bear Creek, 80–81, 83
 Berthoud Pass, Colorado, 24
 Deschutes River, 141–142, 144, 148
 John Day River, 14, 18, 19
 Klickitat Creek, 128
 Klickitat Lake, 129–136, 138–139
 Little Stoney Gorge, 47–48
 Little Stoney River, 43, 46, 48
 Maclaren River, 187
 Phoenix airport, 88
 Salish River, 149, 153–154
 sand dunes, 77, 78, 82, 83, 84, 85, 86, 98
 Smohalla River, 56, 93, 169–170, 173
 Sonoran Desert, 89, 90, 91–92, 97–98, 99
 Willamette River, 9, 11
 See also birds; specific types of
 Apollo, 171–172
 arroyos, 94–95
 Astor, John Jacob, 15
 Athens, Greece, 172
 Attica, Greece, 171–172
 autumn on the Salish, 152–154
- B**
 bass, large-mouth, 134–135
 bats, 88, 91
 Bay of Islands, Ontario, Canada, 25–27
 beaches, 3–4
 bear, 77, 80–81, 191–192
 Bear Creek, **77–86**
 Bear Mountain, 51
 beauty, love and, 26–27
 beaver, 9, 31, 128, 129–130, 193
 beaver dams, 193
 bees, 8
 beetle tracks, 85–86
 Berry, Wendell, 53
 Berthoud Pass, 23–25
 Berthoud Pass, Colorado, 24
 Beston, Henry, 53
Best Word Book Ever (Scarry), 60
 birds
 Aguajita Wash, 93, 95, 96
 Alaska, 193
 behavior of, 31
 Berthoud Pass, 24
 Deschutes River, 148
 John Day River, 14, 18, 19
 Klickitat Lake, 127
 Metolius River, 73
 sand dunes, 85
 Smohalla River, 93
 Sonoran Desert, 89–90, 92, 98–99
 Willamette River, 11
 See also by common name
 birdsong, 19, 47, 91, 92
 bird tracks, 85
 birth Creek, 61
 bitterroot, 61
 blackberries, 56
 blackbirds, 148
 Black Butte, 72
 Brauner, Professor, 168–169
 Brazos River, **101–108**
 Buck Creek, 153
 bugs. See insects
- C**
 cactus, 87, 88, 90, 98–99, 177
 cactus wren, 91
 caddis flies, 141–142
 camp, setting up, 51–54
 camping trips
 sand dunes, 79–80, 81–85
 Smohalla River, 167–168
 Sonoran Desert, 96–98
 Willamette River, 3, 8–9, 11
 canoeing, 25–27, 78
 canyon wren, 18, 19
 Cascade Mountain Range, 57–58, 72
 Cassiopeia, 22
 chickadee behavior, 31
 children
 poking around by, 33
 singing to, 94, 122–125
 See also daughter (Erin); son (Jonathan)
 Christmas visits, 6–7
 Clackamas River, **159–165**
 clarity, 172
 of the air, 187
 desire for, 174–175
 in life, 170–171, 172
 Clark, William, 61
clarus, 174
 Cleveland, Ohio, 5, 6–7
 clothes for dancing, 103–104
 clouds
 Puget Sound, 121–122
 Seeing the elephant in the, 10
 Coffee Pot, 109
 Collingwood, R. G., xvii
 Colorado River, 111–112
 colors
 of camp, 52
 of the desert, 16–17, 98
 of fish, 144
 of light, 24
 night sky, 24, 29
 of rafts, 53
 of water, 17, 44, 121–122, 182, 187
 Columbia River, 15
 Coquille Indians, 129–133
 cougar, 77, 84
 “Cowboy Lullaby”, 94
 Cow Slough Bay, 81
 coyote, 82, 83, 85
- D**
 dance class, 101–108
 daughter (Erin)
 childhood, 33, 60, 122–123
 desert camping, 93–94, 97
 fawn deer follows, 82
 KDM’s desires for, 3, 12
 KDM’s letting go of, 121, 122–123
 mentioned, 44, 48, 52, 92, 99
 river camping, 3, 8–9, 11
 sand dunes camping, 81
 singing, 9, 122–123, 124–125
 Steve and, 119, 120–121
 Day, John, 15
 death
 KDM’s mother, 69–71
 KDM’s parents, 7, 69–71, 110, 113, 115, 151–152
 understanding, 152, 156
 deer, 31–32, 77–78, 82, 86
 Delphi, 171–172
 Denali Highway, 192
 Descartes, René, 168, 169, 171, 172
 Deschutes River, **141–148**
 desert. See high desert country, Oregon; Sonoran Desert
 desire(s)
 for clarity, 174–175
 creating, 3
 Hobbes on, 182
 hormones of, 129–133
 KDM’s, 108, 174–175
 KDM’s for Erin, 3, 12
 Doc, 180–181
 dogs, 35
 poking around, the art of, 35
 tracking by, 35
 Douglas-fir, 127
 doves, 92
- E**
 eagle, golden, 98–99
 Earth, creation of, 46–47
 earth-mother analogy, 67–69, 71–72
 Ecclesiastes, 150–151, 156
 Einstein, Albert, 46
 Emerson, Ralph Waldo, 17
 emotions
 of the desert, 186
 KDM’s, 9, 188–189
 of the land, 186
 mental illness and, 188, 190
 of pain, 116
 of toads, 186
 of weather, 188, 190
 See also specific emotions
 Eros, 22
 erosion, 47
 evening primrose, 61
 excitement and happiness, 14
 existential dread, 10
- F**
 faith, 138–139
 Family Island, 62
 farewell-to-spring (*Clarkia amoena*), 61
 father of author
 beliefs of, 151
 birthday poking around, 34
 home of, 152
 illness and death of, 16, 20, 110, 113, 115, 150–152
 Metolius River headwaters

- trip, 73
as scientist/academic, ix, 59–60, 62, 151–152
Fawn Lake ski trip, 57–58
fear
crossing rivers, 41–42
of flying, 113–115
rattlesnakes, 178–179, 182, 185–186
fish
Alaska, 193
colors of, 144
Deschutes River, 144
Little Stoney River, 48
Maclaren River, 191
Salish River, 149, 153–154
fishing, 27, 48, 141, 142–148, 169–170
Fletcher, Colin, 53
float trips, 14, 17, 192–193
flowers named for Lewis and Clark, 61
fly-tying, 144–145, 147
Fort Vancouver, 15
foxes, 25
fragrance
of the breeze, 16
of the desert, 13, 16
Magruder Bay, 28
of the river, x, 3, 12, 73, 173
sand dunes, 81
friendship
of old women, 163
time for, 159–165
- G**
Genesis, 62
geology
Alamo Canyon, 177
Cascade Mountain Range, 72
high desert country, 13, 14, 16–17
John Day River, 17
Little Stoney River, 43
George, Jean, 57
Gila monsters, 95–96
Gilligan's Island, 57
goats, mother love of, 24–25
God, name of, 63
Grand Canyon, 46, 111–112
grandfather of author, 3–4
Greece, 171–172
grief, 152–153, 156
See also sorrow
grizzlies, barrenland, 191
gulls, ring-billed, 99
- H**
happiness
constituents of, 14
KDM's beliefs, 14
of morning, 173
of mothers, 120
rivers as, 14
sorrow's balance, 17, 20
Soviet joke about, 63
tranquility in, 14
Harney, Oregon, 14, 17
- Harney Rapids, 14, 17, 18
Hartman, Reverend, 150–151
hawk, red-tailed, 33–34
Helen of Troy, 22
Hell's Canyon, 109
heron, 73, 134–135
hibernation in squirrels, 189
high desert country, Oregon, 13, 14, 16–17
See also Sonoran Desert
Hinckley Lake, 34
Hobbes, Thomas, 182
home
creating, 53–54, 58
Kathleen's father's, 152
Olaus' bed, 54
pleasure and, 53, 54
returning to, 3, 6–7, 11–12
safety/security of, 53–54
setting up camp, 51–52, 81
treehouses as, 54–57
homing instinct, 7–8, 9–10, 11–12
hope and wandering, 33
hormones of love, 25
horsetails, 32
humans, characteristics of, 31–37, 184, 186
hummingbirds, 95, 111
husband (Frank)
bear tracks laugh, 80
Berthoud Pass, 23–24
on crossing a river, 42
at dance class, 101, 104–106
fishing, 141, 169–170
on love, 24
mentioned
Alamo Canyon, 177
in boats, 18, 19, 28, 29, 51, 167
in cars, 13, 16, 87
crossing rivers, 44
Erin and, 123
Jonathan and, 143
KDM and, 26, 120
Little Stoney Gorge, 48–49
sand dunes, 79, 84
in thunderstorms, 41, 91
newt study, 135–136
rattlesnakes and, 97–98, 169–170
river float boat jam, 19
setting up camp, 51–52
skipping rocks, 170
Sonoran Desert walk, 96–98
on toads, 183
- I**
ilria, 62
imagination, 33, 137
immigrants, 104–105, 107–108
insects
Deschutes River, 141–142
homing instinct in, 8, 11–12
Klickitat Creek, 128
Little Stoney Gorge, 47–48
Little Stoney River, 46
sand dunes, 85
- Smohalla River, 173
Sonoran Desert, 90, 93
See also specific types of
Inuit, 62
- J**
jackrabbit, 89
Jensen, Mr. and Mrs., 159–165
Jet Stream, 109–116
John Day River, 13–20
jokes, Soviet, 63
joy. See happiness
- K**
kangaroo rats, 92
kappia, 62
Klickitat Creek, 127–139
- L**
Lake Billy Chinook, 72
lakes
at night, 28
sounds of, 57
language of faith, 139
Lao Tzu, 137
Lava Falls, 111–112
Lemhi Park, 154
Lewis, Meriwether, 61
Lewis come-back-to-life (*Lewisia rediviva*), 61
life
clarity in, 170–171, 172, 174–175
ideas vs., 169
searching for the meaning of, 138–139
light
Berthoud Pass, 24
colors of, 24
moonlight/moonshine, 22
on moving water, 128, 155–156
on Puget Sound, 120–121
lightning, 48–50
Lillian (neighbor), 159–165
Little Current, 25–27
Little Stoney Gorge, 43–44, 45, 47–48, 49
Little Stoney River, 41–50
lizards, 90, 93, 94, 95–96
Locke, John, 36
logging, 127
loons, 193
lost in Magruder Bay, 27–28
love, 22, 24–25, 26–27
lunatics, 190
- M**
Maclaren Glacier, 187
Maclaren River, 187–193
Maclaren Summit, 187
Magruder Bay, 27–28
The Man Who Walked Through Time (Fletcher), 53–54
Marty (dance instructor), 101–102, 106
mating behavior, 25, 129–134, 136, 183
mayfly, 46
McKenzie River, 59–64
- McKenzie River Trail, 59, 63, 64
Medea, 22
memories
homing instinct and, 3–12
and identity, 36
and pain, 115–116
of smells, 88
mental illness, 188
Metolius River, 65–73
mice, 78, 91–92
Middle Ages, 35
Mill, John Stuart, 14
mink, 128
Mitchell, Oregon, 16
moonlight/moonshine, 22
Moore, Kathleen Dean
beliefs of, xiii, 18, 19–20
character, 17, 116, 170–171, 188
childhood, 34, 55–56, 123–124
the daughter, 113–115
desires of, 108, 174–175
emotions, 9, 42, 113–115, 188
faith of, 138–139
fear of flying, 113–115
friends of, 111–112, 159–165
graduate student, 168–173
grandparents, 4, 5
married life, x, 5–7, 57, 101, 104–107
motherhood, 57, 60–62, 65–67, 88
personal identity of, 36
possum baby and, 65–67
professional life, xii, 188–189
riverwalking, ix–xii
self-identity, 36, 63
stopped by police officer, 63
See also daughter (Erin); father of author; husband (Frank); mother of author (Dora); son (Jonathan)
mosquitoes, 187, 192
Mother Earth, 67–69, 71–72
mother love, 24–25
mother of author (Dora), ix, 3–4, 34, 69–71, 124
mothers
baby possum, 65–67
faith of, 25
letting go, 121, 122–123
power of forgiveness, 71–72
wood ducks, 119–120
See also mother of author (Dora)
mountains, time and, 43, 45–46, 47, 49
mourning doves, 92
mouse, pocket, 91
Mt. Jefferson, 73
Muir, John, 190, 192
Murie, Margaret, 54
music
for dancing, 16, 102, 106
of the river, 9
See also singing; sounds
My Side of the Mountain (George), 57

- N**
naming things, 59–64, 87–99
native Americans, 15, 57, 62
Nature, vengeance of, 20
night
 canoeing at, 26
 fishing at, 27
 snakes of the, 97–98
 snowbanks in the, 21–22
 water in the, 22, 28, 73
night fall, 83–84
night sky colors, 24, 29
- O**
Ochoco Mountains, 16
Olaus' bed, 54
Olson, Sigurd, 190
Oregon, Moore move to, 6
Oregonians, 104–105, 135
Orion, 24
otter, 80, 128
ouzel, 44
owl, screech, 34
- P**
Pacific coast sand dunes. *See* sand dunes
pain
 emotional vs. physical, 116
 John Day and, 15
 killing, 115
 pleasure and, 14, 20
Painted Hills, 16
Panther Creek, 61
parents
 faith of, 25
 See also father of author;
 mother of author (Dora);
 mothers
peccaries, 95
pelicans, 36
philosophy, xiii, 169, 170–171,
 172–173
 See also specific philosophers
Phoenix airport, 87, 88, 99
pigeons, homing in, 8
pine, lodgepole (*Pinus contorta*),
 61
pioneers, Seeing the elephant
 by, 10
Plato, 21
pocket mice, 91–92
poetry, 170–171
poke-easy, 35
poking around, the art of, x,
 31–37
Portland (Oregon) airport, 6
possum, 65–67
Psalms, 151
ptarmigan, 24, 25
Puget Sound, **119–125**
Pythias, 171–172
- Q**
quicksand, 78, 80
- R**
rabbit, cottontail, 91
rafts, 53, 111–112
rain
 on rivers, 155
 sounds of, 191
Rainier Falls, 109
rat, desert kangaroo, 91
rattlesnakes, 97–98, 169–170,
 177–181, 184
 See also snakes
raven, 85
Red Birch Camp, 148
river canyons, 110–111
river rafting, 111–112
rivers
 continuous, 109, 110
 crossing, 41–42
 in the fog, 22
 as happiness, 14
 landscape of, 174
 named by Lewis and Clark, 61
 navigation using, 4
 at night, 22, 73
 pool-drop, 109, 110
 power of, 49, 109–110,
 111–112
 rain on, 155
 as safety, 113–115
 smells of, x, 3, 12, 73, 173
 time and, 153–155
riverwalking, ix–xii, ix, 41
 See also walking
roadkill, 65, 89, 181
robins, 11
Robinson Crusoe, 57
rockslide, meeting up with, 45
Rocky River, ix–x
Rogue River, **21–29**
Rogue River Valley, 21–22
roughskin newts (*Taricha*
 granulosa), 129–136, 138–139
rowboats, x–xi, 34
- S**
saguaro, 87, 90, 97, 177
salamanders, homing in, 8
Salish River, **149–156**
salmon, 149, 153–154, 191
sand dunes, 77–86, 98
sandpipers, 80
Santiam Pass, 72
Sartre, 10
Sartwell, Mrs., 164
Scarry, Richard, 60
seasons, 89–90, 152–154, 188
Seeing the elephant, 10
self-identity, 36, 63, 104–105,
 107–108
Sheep mountain, 96
singing
 alone, 125
 to children, 94, 122–125
 Christmas carols, 6
 grandfather's, 4
 KDM's childhood, 123–124
 mother ducks, 120
 on the river, 9, 20
 See also music
sisters of author
 birthdays, 34
 childhood, ix, 6–7, 69–70, 124
 Christmas visits, 6–7
 father's death, 150–151
 mother's illness and death,
 69–70
 riverwalking, ix
Sisyphus, 46
skiing, 21–22, 57–58
Skookum Creek, 143–144
sky
 clouds in the, 10, 121–122
 night colors, 24, 29
slime mold, 63
smells. *See* fragrance
Smohalla River, 173
 on a cloudy day, **167–175**
 in the sun, **51–58**
Snake River, 15, 109–110
snakes
 coachwhip, 99
 garter, 7–8, 93
 gopher, 89
 homing instinct in, 7–8
 the life of, 184–185
 thinking like, 185–186
 See also rattlesnakes
snake-watching, 179–180
snowbanks in the night, 21–22
Socrates, 26–27
son (Jonathan)
 character, 146, 147–148
 childhood, 33, 34, 54–55, 60,
 146
 father, relationship with, 19
 fishing, 48, 142–144, 146–148
 fly-tying, 144–145, 147
 John Day River, 18–19
 mentioned, 51
 sand dunes camping, 81, 84
 setting up camp, 51–52
Sonoran Desert, 90–91
songbirds, homing in, 8
Sonoran Desert, 89–98, 186
 See also Alamo Canyon; high
 desert country, Oregon
sorrow
 letting go and, 121, 122–123
 the balance of happiness, 17,
 20
 See also grief
sounds
 desert, 97, 181–182
 life and, 183
 loons, 193
 mosquitoes, 187
 rattlesnake, 178
 saguaro, 97
 sand dunes, 79
 of scaring bears, 191–192
 speed of, 49
 of storms, 183
 of trees, 167
 water, 18, 45, 57, 167, 181,
 187, 191
 wind, 97, 167
 See also music; singing
Soviet joke, 63
spadefoot toads, 182–183
spring in the desert, 89–90
squirrels, 89, 189
stars, 23–24, 26
Steve (friend of Erin), 119,
 120–121
stones
 skipping, 170
 spinning, 32–33
storms, 48–50, 91, 183, 187
suffering. *See* pain
sun, Thoreau on, 37
sundogs, 98
Susan (friend), 111–112
swallows, 14, 18, 127, 148
swans, mates for life, 25
- T**
taxonomy, 59–64, 87–99
Thoreau, Henry David, 32, 35,
 37, 42, 53
Thornaby-on-Tees, Yorkshire,
 3–4
Three Springs Bridge, 14
thunderstorms, 48–50, 91, 187
ticks, 47–48
Tidewater, 154
time
 analgesic of, 115–116
 for friendship, 159–165
 imagining, 48
 mountains and, 45–46, 47, 49
 natural movement of, 47, 156,
 164–165
 rivers of, 153–154
 speed of, 46
 Thoreau on, 42
 ticks and, 48
toads, 182–186
tradition, 9–10
tranquility, 14
travel
 by boat, x
 dancing as, 101, 102
 KDM's fear of, 113–115
treehouses, 54–57
trees
 Aguajita Wash, 94, 95
 Alamo Canyon, 177
 Bear Creek, 77
 Cascade Mountain Range,
 57, 72
 Deschutes River, 148
 high desert country, 13, 16
 John Day River, 14
 Klickitat Creek, 128
 Klickitat Lake, 127
 Little Stoney Gorge, 44, 45, 49
 Maclaren River, 191
 Metolius River, 72
 named by Lewis and Clark, 61
 Ochoco Mountains, 16
 Salish River, 149, 155–156
 Smohalla River, 51, 56
 Sonoran Desert, 89, 93
 sounds of, 167
 See also by common name
trout, 48, 153

trout flies, 144–146, 147
truth and details, 36
Two Springs Ranch, 148
Tyee Rapids r, 109

U

Umpqua River, 109
universe, reciprocity in, 17–18

W

walking

poking around vs., 32
the Sonoran Desert, 92–98
See also riverwalking
Walking (Thoreau), 37
Wallowa Mountains, 15m
wasps, homing instinct in, 11–12
water
colors of, 17, 44, 121–122,
182, 187
sounds, 18, 45, 57, 167, 181–
182, 187, 191

water ouzel, 43
water strider, 173
weather, emotions of the, 188,
190
Whiskey Dick, 148
White Horse Rapids, 148
Wildcat Rapids, 109
wilderness excursions, 53, 58
Willamette River, 3–12
Wilson, Mrs., 164
wind

on the dunes, 79
sounds of, 97, 167
Winter Creek, 31–37
women, domesticity of, 53
wood ducks, 119–120
woodpeckers, 61
wood rats, 56, 91
World War Two, 4

Y

yhwh, 63A

Appendix 3 Index by a new indexer

Ajo Mountains, 177
Alamo Canyon, 186
Alamo Canyon Creek, 177, 182
and rattlesnakes, 177–186
Alaska, 187
Denali Highway, 192
Alder Bear Mountain, 51
Alder Creek (Salish River), 149,
154
Alsea, North Fork, 109
ambiguity
and courage, 175
Aguajita Wash (Phoenix,
Arizona), 87, 93
Aristotle, 139
Arizona
Gila monster, 95–96
Phoenix, 99
Aguajita Wash, 87, 93
Sonoran Desert, 87
aurora, 29, 190

B

balance
see equilibrium
Bay of Islands (Ontario, Canada)
Little Current, 25
Winter Creek, 33, 37
Bear Creek, 77
Cow Slough Bay, 81
quicksand, 77–78
sand dunes, 77–78
Berry, Wendell
long-legged house, 53
Berthoud Pass, 23
Best Word Book Ever (Scarry), 60
Beston, Henry
outermost house, 53
Black Butte (Cascade
Mountains), 72
Brazos River, 101
Buck Creek, 153

C

caddisflies, 141–142
Cascade Mountains
Black Butte, 72
Fawn Lake, 57
Green Ridge, 72
Lake Billy Chinook
Bureau of Land Management,
72
Metolius River, 72–73

Mt. Jefferson, 72–73
Santiam Pass, 72
Clackamas River, 159, 163
Coffee Pot (Rogue River), 109
Colorado River, 111
Columbia River, 15
Coquille Indians, 134
Cuyahoga River, 5

D

Day, John, 15, 20
river (see John Day River)
Denali Highway, 192
Descartes, Rene, 168, 171, 172,
173
Deschutes River, 141, 147
Red Birch Camp, 148
Two Springs Ranch, 148
Whiskey Dick, 148
White Horse Rapids, 148
Devil's Staircase (Rogue River),
109
Diamond (Colorado River), 111
domesticity
see home

E

Einstein, Albert, 46
Emerson, Ralph Waldo, 17
equilibrium, maintain, 189, 192

F

Fawn Lake (Cascade Mountains),
57
fish
salmon, 149, 153, 154
sturgeon, 27
trout
cutthroat, 153
red-banded trout, 48
fishing flies, 142–148
trout flies, 144–145
Fletcher, Colin
*The Man Who Walked Through
Time*, 53–54
walked the Grand Canyon, 54
Fort Vancouver, 15
French existentialists
Sartre, 10

G

George, Jean
My Side of the Mountain, 57

Gilligan's Island, 57

Great Plains

country-western dancing, 101

Greece

Ancient Greece

Athens, 172

Ancient Greek mythology

Apollo, 171

Eros, 22

Sisyphus, 46

Ancient Greek philosophy, 171

Delphi, 171

Green Ridge (Cascade
Mountains), 72

H

happiness, 14, 17

Harney Rapids

See John Day River

Hell's Canyon, 109

Hinckley Lake, Ohio, 34

Hobbes, Thomas, 182

home, 52, 53–55

Anasazi Indians' stone houses
built in caves on cliffs, 57

and *Swiss Family Robinson*

treehouse, 56

and women, 53

Gilligan's Island, 57

philosophers on, 173

Robinson Crusoe hillside house,
57

homing, 8

J

jet stream, 108

John Day River, 13, 15, 17–18,
109, 111

joy, 186

joy and pain, 17

K

keeping house

see home

Klickitat Creek, 127–128, 135

Klickitat Lake, 127, 129, 135, 139

L

Lake Billy Chinook (Cascade
Mountains), 72

landscape, 173

as place, 173–174

desert, 186

Lao Tzu, 137

Lava Falls (Colorado River), 111

learning, 36

Lee's Ferry (Colorado River),
111

Lemhi Park, 154

Lewis, Meriwether and Clark,
William, 61

Little Current (Ontario, Canada),
25

Little Stoney River, 41

Little Stoney Gorge, 44, 48

Locke, John

on personal identity, 36

loon, 193

love, 21, 22, 26–27

M

Maclaren (Alaska), 191

Maclaren Glacier, 187

Maclaren River, 187, 190

Maclaren Summit, 187

Magruder Bay (Ontario, Canada),
27

McKenzie River, 59

McKenzie River Trail, 64

Metolius River (Cascade
Mountains), 65, 72–73

Mill, John Stuart, 14

mothers, 24, 70–71, 121

Mother Earth, 67–68

mother to orphaned possum,
65–66

power to forgive, 71

Mt. Jefferson (Cascade
Mountains), 72–73

Muir, John, 190, 192

Murie, Margaret

Brooks Range, 54

My Side of the Mountain
(George), 57

N

newts, 129–139

O

observation, 147, 184

Ochoco Mountains, 16

Old Testament

Ecclesiastes 3, 150–151

Olson, Sigurd, 190

Oregon Agricultural College
See Oregon State University
Oregon State University, 163

P

pain, 115
emotional, 116
physical, 115
Painted Hills (Oregon), 16
parenting, 25
permafrost, 191
Phoenix, Arizona
Sonoran Desert, 87, 89
Plato
Symposium, 21
poking around, art of, 31–37
Puget Sound, 119

R

Rainie Falls (Rogue River), 109
rattlesnakes, 177–186
Red Birch Camp (Deschutes River), 148
redemption, 66, 71

rivers

continuous, 109
pool-drop, 109
Robinson Crusoe (Defoe), 57
Rogue River, 21, 109, 111
Coffee Pot, 109
Devil's Staircase, 109
Rainie Falls, 109
Rogue River Valley, 21
Tyee Rapids, 109
Wildcat Rapids, 109

S

Salish River, 149
Alder Creek, 154
salmon, 149, 154
life cycle, 154
parr, 153
steelhead, 154
Santiam Pass (Cascade Mountains), 72
Sartre, Jean-Paul, 10
Scarry, Richard
Best Word Book Ever, 60

seasons of life

see Old Testament,
Ecclesiastes
seeing the elephant, 10
Skookum Creek (Alaska), 143
Smohalla River, 51, 109, 167, 169
Snake River, 15, 109, 110
Socrates, 26–27, 171
Sonoran Desert, 87, 89
Swiss Family Robinson (Wyss), 56
Symposium (Plato), 21

T

taiga, 191
The Man Who Walked Through Time (Fletcher), 53–54
Thompson Reservoir, 36
Thoreau, Henry David, 32, 35, 43, 71
Walden Pond, 53
Walking, 37
time, 46
trout, 48, 153
tundra, 191

Two Springs Ranch (Deschutes River), 148
Tyee Rapids (Rogue River), 109

U


Umpqua River, 109


W


Walden Pond (Thoreau), 53
Walking (Thoreau), 37
Wallowa Mountains, 15
water as agent of change, 174
Whiskey Dick (Deschutes River), 148
White Horse Rapids (Deschutes River), 148
Wildcat Rapids (Rogue River), 109
Willamette River, 3, 11–12, 109
Winter Creek (Ontario, Canada), 33, 37
World War I, 4


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