

The  
Accidental  
Indexer



Nan Badgett  
Foreword by Margie Towery

The  
*Accidental*  
Indexer





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Accidental  
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***The Accidental Indexer***

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To Spencer, who influenced my career far  
more than he realized.



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# Foreword

Speaking as an accidental indexer, I wish I'd had this book in hand when I started indexing two decades ago! But then, of course, much has changed in the indexing world since the mid-'90s. My first index was created for the back issues of a scholarly journal for which I worked as a graduate assistant. I used a controlled vocabulary that I had created, and worked in a database on a mainframe. When I wanted to see how the index was progressing, I called the computer department and requested a printout, then walked down the next day to pick up the wide-format, dot-matrix-printed, green-and-white-striped paper printout—the kind that came folded accordion style. Several years later, I met a professional indexer and made a conscious decision to pursue indexing as my career. After creating my first back-of-the-book index, I knew this was what I'd always wanted to do when I grew up.

Beyond a concise history of the indexing profession and an up-to-date overview of its current challenges, Nan Badgett has written a substantive guide to the many facets of an indexing career. Potential and newer indexers, curious onlookers, and even seasoned pros will find in these pages much to enlighten and delight them. Potential and fledgling indexers will find specific guidance on whether or not indexing is a good choice for them, where to get training, what types of indexing projects are available, what equipment and resources are needed, and how to market and deal with clients, along with cautionary advice on the pitfalls of the profession. Long-time indexers will find new ways of dealing with some of the challenges, gain reassurance that they are not totally alone despite the inherent isolation, and recognize their colleagues in the illustrative anecdotes.

*The Accidental Indexer* does not hide the difficulties that indexers may face; rather, it lays out the pros and cons of choosing this profession. After all, not everyone is cut out to be an indexer. Other

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readers, such as indexers' friends and families, will fulfill their curiosity about indexers' lives, schedules, and work processes.

Thus, a variety of readers will gain insights from reading *The Accidental Indexer*. Indeed, what Nan has accomplished in these pages demonstrates what every good indexer must do: gather up the important bits of information, organize them in a usable format, and create a tool for exploration. Beyond that, the book points to many additional helpful resources.

*The Accidental Indexer* will reassure long-time indexers, enlighten our family and friends, and provide much for potential and newer indexers to cogitate as well as clear steps to move forward in this career. In short, it is an inspirational map of the challenging, ever-changing indexing profession, and a great starting point for making it one's own.

—Margie Towerly  
January 2015

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A published book, like so much else in life, is something we can't do alone. From inception to binding, there are many people involved in the process and many to thank.

First, thanks to all the indexers and editors who took the time to participate in *The Accidental Indexer* survey, answered interview questions or other queries, and allowed me to use their stories. The book wouldn't be nearly as interesting without your contributions.

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These acknowledgments would not be complete without an expression of gratitude to my husband, Jerry Harmon, who has always supported and encouraged all my endeavors and who believes in me even when I don't believe in myself. Thanks for reading every word I write.

# About the Website

[accidentalindexer.com](http://accidentalindexer.com)

*The Accidental Indexer* answers many questions about the indexing profession. The text also refers to numerous websites, online articles, and other resources. The book's companion website gathers these links in one place to provide quick access to this information ([accidentalindexer.com](http://accidentalindexer.com)). Please send any comments, updates, suggestions, and questions about the website or the book to the author at [nan@dbawordability.com](mailto:nan@dbawordability.com).

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# Introduction

*What do you say when you meet an indexer?*

When most people meet a working indexer for the first time, they are so surprised to learn that professional indexers even exist that they hardly know what to say. Few are aware that someone actually reads the book and prepares the index. Although readers often expect to find an index in the back of a book, they have given little thought to how it got there, assuming that the author or publisher prepared it, or that a computer program generated it. They have given even less thought to who might create the search terms in online encyclopedias or periodical indexes.

When I first discovered the indexing profession and decided to pursue it, I quickly learned the nature of its obscurity. Indexers are a relatively invisible group, and experienced indexers are often as anonymous as the novice. Most professionals, even those who made deliberate choices to pursue the career, first discovered it accidentally. Technical writers and other authors may learn of the profession only when their work requires an index. Others are indexing without even realizing it while working on databases or online search systems. Still others discover indexing while exploring career options. No matter how one learns of the profession, it generates curiosity and may even inspire a desire to pursue the career.

Indexers at all levels face the same surprise and curious questions from those who learn of the vocation for the first time. The goal of *The Accidental Indexer* is to provide answers to these questions—and more—for aspiring indexers and anyone curious about the profession.

Like an index itself which points the way to more information, this book gives an overview of the profession while pointing the reader to many additional information resources. Rather than covering indexing techniques (as do most of the available books

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on indexing), *The Accidental Indexer* describes what it is really like to work as an indexer, discusses the joys and frustrations, and provides information on getting started in the profession. The book draws on the experience of many professional indexers as well as my own during the past twenty-odd years. After all, I am myself a completely accidental indexer.

To solicit information from my colleagues, I conducted a brief, informal survey in early 2014. The survey asked respondents for descriptions of their paths to the profession, what they enjoyed most about the profession, types of indexing performed, stress factor ratings, and demographics. The survey invitation was posted on ASI-L and other indexing related social media sites. Seventy-four indexers took the time to participate. Although not a large number, the sample suffices to show trends and provide insight from some well-known and highly esteemed professionals. I also conducted a survey of editors who hire indexers. The response produced a small sample, but again enough to show trends and opinions.

*The Accidental Indexer* survey results, presented throughout the text, are sometimes compared to earlier surveys conducted by the American Society for Indexing (ASI) to show industry trends over time. Although completely non-scientific, the survey results are interesting, and the stories are compelling.

Each of the book's ten chapters addresses questions that are often posed to indexers. The two most common questions are, "What exactly is indexing?" and "What does an indexer do?" As a foundation for the rest of the book, Chapter 1 explains what an indexer does and why computer technology can't automate the entire process. It also provides a brief history of index makers, who have been misunderstood throughout history. One, John Marbeck, was even condemned to death for his work! Marbeck was convicted of heresy in 1544 but was later pardoned.<sup>1</sup>

After a basic understanding of indexing is reached, then comes the next question: "How did you get into that career?" The answers vary as much as the indexers themselves. Chapter 2 describes paths to the profession, both accidental and deliberate. The chapter also

details the education and professional backgrounds of survey participants, as well as differences between indexers who work as employees and those who operate as freelancers.

Yes, indexers have to read an entire book in order to index it, but indexing is not confined to book publishing. Chapter 3 discusses different types of indexing, including both print and electronic texts, and the differences between them.

Chapter 4 takes a light-hearted look at the characteristics of indexers. Then it delves into the stressful realities of the work, such as deadline pressure and schedule changes.

For those undaunted by the stressful aspects of the work, Chapter 5 outlines different training options for learning to index. In addition to training, indexers must understand standards of quality and good practices—topics also discussed in Chapter 5.

What is required to set up an office and get started in business? Chapter 6 runs through the tools of the trade to help those starting out set up an office for productivity. The chapter explores office location options and furnishings, outlines hardware and software requirements, lists resource materials needed, and even discusses types of business structures.

Once an indexer completes training and has set up a workspace, how does she find work? Chapter 7 focuses on marketing and client relations. Marketing is necessary in any business, but is especially important for freelancers and businesses without storefront visibility. After finding clients, knowing how to work with them for repeat business is crucial. Current marketing methods, terms of negotiation, and dealing with unhappy clients are all discussed in Chapter 7.

For those unaccustomed to the challenges of self-employment, Chapter 8 looks at the lifestyle and workstyle choices that can ease the stress and create a healthier life both inside and outside the office.

Despite the challenges, self-employment can provide opportunities for creativity and thinking outside of the box. Chapter 9 highlights some enterprising indexers who have used their creativity

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to develop new business models, collaborate to get the job done, and find work opportunities.

For those ready to take the leap into starting an indexing business, Chapter 10 offers encouragement and guidance toward taking action. After some soul searching as part of the decision to move forward, readers can explore the parts of a written business plan.

Finally, the book's appendices complement the text with useful business forms and guidelines on index quality. Appendix A includes three sample forms to use when contracting work, ranging from a simple email message to a formal indexing agreement. This appendix also includes forms for tracking your income and your marketing efforts. Appendix B includes a list of the benchmarks of a quality index along with guidelines for editing an index. Appendix C presents the judging criteria for the ASI/EIS Publishing Award for Excellence in Indexing, as well as a list of award winners since its inception.

Although *The Accidental Indexer* doesn't attempt to cover all aspects of the indexing profession in detail, it shows through its overview that the profession presents many more challenges than the uninitiated might expect. It is my hope that the book will inform the curious and answer their questions; amuse the experienced and provide some coping skills; and inspire the aspiring by pointing them in the right direction.

Happy indexing!

#### **Endnote**

1. Encyclopaedia Britannica online edition, 2014, accessed July 2, 2014, [britannica.com/EBchecked/topic/363964/John-Marbeck](http://britannica.com/EBchecked/topic/363964/John-Marbeck)

# **Animal, Vegetable, or Mineral?**

*If indexers were vegetables, what vegetable would they be?*

At an American Society for Indexing (ASI) conference reception in 2000, a group of indexers answered the riddle, “If indexers were vegetables, what vegetable would they be?” The answer was kohlrabi, because no one knows who we are, or what to do with us.<sup>1</sup>

All indexers have stories, no doubt, of trying to explain their profession. When asked what I do for a living, I often answer enthusiastically, “I’m a professional indexer; I write indexes for the back of books.” In response, I often hear, “Oh,” accompanied by a blank stare, or “Hmm, now what is it that you do?” I know immediately that the person has no idea what I’m talking about, and that they probably haven’t used an index lately. Even after some brief explanation such as, “I prepare the keyword list in the back of a book,” or “Basically, I read books for a living and perform content analysis,” I may still be confused with a book reviewer or editor.

Those who better understand may respond with, “Really! I’ve never met anyone who did that; in fact, I didn’t know people did that!” or “Wow! That sounds difficult.” On rare occasion, someone has expressed their appreciation for the work of indexers who map information.

## **What Is an Indexer—Or an Index, For That Matter?**

As a result of being misunderstood, indexers have often discussed alternative titles to better describe the profession as well as elevate

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### Catered to Indexers

In 2001, I was responsible for planning a workshop event for my local ASI chapter. When interviewing caterers, I knew I had found the right one for our group when she suggested decorating the buffet table with books open to the index. Indeed, the table was lovely, decorated with a theme of honey and honeybees, complete with an old book on beekeeping open to the index. Never mind what she planned to serve, she understood our profession!

its status. Stereotypical images of gray-haired indexers cloistered in small offices, bent over scholarly tomes with boxes of index cards stacked beside them are no longer appropriate in this age of digital information. While analyzing content and extracting key concepts is still the nature of their work, today's indexers are information professionals seated (or standing) in front of computer screens (see Chapter 8 for more on standing desks and ergonomics). They may still be producing indexes for printed books with actual page numbers, but most, if not all, now work from electronic files. Would Information Professional or Content Analyst be a better term than Indexer? What about Content Strategist, Information Retrieval Specialist, or Content Map Creator? These terms sound more current, but may not be any better understood in a casual conversation. To clarify the term "indexer," it may be necessary to define the term index.

In this context we are concerned only with indexes related to information retrieval. Clearly there are many other types of indexes, such as financial indexes, as Hans Wellisch reminds us in his discussion of the term index (see box).

An index is a list of terms with location identifiers, such as page numbers. This simple definition is clear, and some indexes are indeed that simple, such as an index of author names or first lines of poems. A well-prepared subject index that reflects the contents

### An Indexer By Any Other Name

“If you are asked at a wine and cheese party what your profession or hobby is, and you answer proudly ‘I am an indexer,’ you may, depending on the background of your inquirer, be deemed to be a mathematician, a physicist concerned with optics, an anthropologist, a paleontologist, a geologist, an economist, a mechanical engineer, a forestry expert, or a computer scientist...”<sup>2</sup>

of a text, however, is much more. In essence, an index is a map to information, but not a rewrite of an entire work. Linda Fetters adheres to this definition in her *Handbook of Indexing Techniques*. “An index is a tool for locating specific information contained within a document. An index is not a summary of the book’s content or an extended capsule discussion of the major subjects treated in the book. If index entries are specific and concise, the index will be an effective finding tool—its primary purpose.”<sup>3</sup>

Merriam-Webster defines an index as “a list (as of bibliographical information or citations to a body of literature) arranged usually in alphabetical order of some specified datum (as author, subject, or keyword): as *a*: a list of items (as topics or names) treated in a printed work that gives for each item the page number where it may be found *b*: thumb index *c*: a bibliographical analysis of groups of publications that is usually published periodically.”<sup>4</sup> While this definition is accurate as specifically applied to printed work, it is narrow in today’s information context which includes pageless indexes to ebooks and web content.

The National Information Standards Organization offers a broader definition of an index as “a systematic guide designed to indicate topics or features of documents in order to facilitate retrieval of documents or parts of documents.”<sup>5</sup> This definition could cover any type of index, and there are many.



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Traditional indexes are those in the back of a printed book, with terms identified by the page number on which they appear. Magazines, newspapers, and other periodicals are also indexed, with terms usually identified by publication date, volume or issue number, and page number. Periodical indexes can become large, cumulative volumes themselves, encompassing many years of publications. Electronic indexes are found in technical documentation, in databases, in ebooks, and on websites (see Chapter 3 for more information on ebook and website indexes).

An index is not a concordance, which contains every occurrence of a term in a text. It is a filtered, analyzed list of topics that facilitates finding information in a text. Nancy Mulvany uses this definition for book indexes: “An index is a structured sequence—resulting from a thorough and complete analysis of text—of synthesized access points to all the information contained in a text. The structured arrangement of the index enables users to locate information efficiently.”<sup>6</sup>

### **What an Indexer Does**

Mulvany’s definition of the index also provides a description of what an indexer does: thoroughly reads and analyzes a text. Yes, an indexer has to read the whole book (the answer to a question often asked), understand it, and distill it into an organized list of main topics, subtopics, and cross-references to facilitate finding information. This must be done with care not to rewrite the book or inject personal opinions or prejudices into the work. Indexing is not for the faint of heart.

Although there are standards and best practices for creating indexes, the process is still subjective and individual. If three indexers indexed the same material, the results would be very similar but not identical in term choices, wording, or cross-references. Working methods also vary. Some read the entire book before going back through the text to create entries. Others do a

quick review of the text to familiarize themselves with the contents, then do a thorough read to extract index terms. Some highlight and mark text; others do not. Indexers of traditional print books create a stand-alone index manuscript. Those working with technical documents may insert index terms directly into electronic files using HTML code. (See Chapter 3 for more information on types of indexes and methods used to create them.) Regardless of the type of index, the work is an intellectual process that requires understanding, reflection, attention to detail, and technical skills.

Indexers also may need subject-matter expertise. This especially applies in certain fields such as the hard sciences, or literary criticism. Subject-matter expertise is even helpful, if not required, for trade books published for the general public. While a how-to book for woodworkers or quilters may be easy to understand, a lack of vocabulary knowledge specific to those subjects could disappoint the index user. The indexer must anticipate the needs of the reader or index user, who is not always the same person. An index user who has read the book will use the index to find specific information remembered from the text. Others may use the index to assess the book's contents in making a purchase decision. A well-indexed book may generate good reviews, which will also influence sales, whether to individuals or libraries.

Although books without indexes may generate sales, they may generate criticism as well. Sarah Palin's 2009 unindexed memoir *Going Rogue* sold close to half a million copies in its first week of release.<sup>7</sup> It also garnered the first Golden Turkey Award from ASI for its lack of an index. The press release about the award stated, "The inaccessibility of information in this text makes it clear to any reader that a good index is essential to a book's long-term value."<sup>8</sup>

## **Authors as Indexers**

Authors sometimes index their own work, but they may not be the best candidates for the job for several reasons. First, they aren't

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always familiar with indexing theory and standard practices. Second, because authors know their work from the inside out, they sometimes write indexes that are overly detailed. Nearly everything is important to the author, whereas a professional indexer can analyze a text with more objectivity in choosing topics for the index. Robert Hauptman, professor emeritus, author, and editor of *Journal of Information Ethics*, knows indexing theory. He has indexed several of his own scholarly works, but admits he may have done a “less than adequate job.” When asked his opinion on authors being too close to their work or not well-versed enough in indexing standards to index their own work, he said, “I think that is absolutely true. I’m pretty certain if you picked up one of my books, read it, and glanced at the index, you’d probably find some problems. On the other hand, the reader would find a high percentage of what he was looking for.”<sup>9</sup>

Another reason authors don’t index their own work is time and energy. After spending the time to write a book, edit it, and review editorial corrections, authors often just don’t want to go through the indexing process, even if they have the expertise. Dr. Hauptman said that after spending two years writing *The Mountain Encyclopedia* with his climbing partner, he simply could not deal with writing an index and asked the publisher to hire a freelancer. He knew it had to be indexed; he learned long ago that any book he wrote should include an index. “Back in 1984, I published my copy-edited dissertation (written in 1971), and after it appeared, Paul Ruggiers, the head of the Chaucer Variorum, said, ‘Always include an index!’ I have followed that advice with very few exceptions.”<sup>10</sup>

Many indexers work directly with publishers and have no contact with the authors whose books they index. Consulting with authors isn’t necessary and can present challenges. Indexers sometimes grimace when an author provides a list of potential index terms, which may be overly detailed, or if the author insists on conventions that don’t comply with standard indexing practices.

(See the section “Style Adherence and Client Education” in Chapter 7 for more on authors’ term lists).

On the other hand, authors can be valuable collaborators. Especially when working on complex scholarly works, a conversation with the author can provide guidance. Victoria Baker describes the advantages of talking with an author before writing an index. “Talking to the author helps me get a jumpstart on what is unique about a particular book’s contribution to the field, and the process of that discussion orients me to the author’s take on his or her own field, thus helping me to locate the arguments even more specifically. This jumpstart saves me time in the long run.”<sup>11</sup> Such discussions can also define expectations and clarify any confusing terms or concepts.

### **Can’t a Computer Do That?**

“Can’t a computer do that?” Professional indexers often hear the question, and the short answer is no. Once you understand that a true index consists of an analyzed list of terms and concepts, with multiple access points provided through synonyms and cross-references, it’s easy to understand why a computer can’t produce a

#### **Not Now, Maybe Never**

“Can search engines find words at blinding speeds? Yes. Can software learn from experience and improve performance? Yes. Can a computer beat a human expert in a game of chess? Yes.

“Why? Because of the human touch in the programming of the software. Can a computer create a book index that will universally suit human readers? Not now, not any time soon, maybe never.”

—Doug Lowry<sup>12</sup>

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good index. Sure, a computer can produce a concordance; computers can even follow rules to apply keywords to content, but at this writing machines cannot produce a true index.

A computer-generated concordance is simply a list of every occurrence of a word in a text, contrary to Merriam-Webster's definition of concordance as "an alphabetical index of the principal words in a book."<sup>13</sup> The issue here lies with the word "principal." A principal word may occur many times in a text, but every mention may not merit a place in the index. Computers (at least at the time of this writing) can't distinguish between substantive use and passing mention of specific words. Consider a cookbook. A computer can identify every occurrence of the word "egg," for example, but the list would quickly grow so long that it would become unusable. If interested in egg recipes, no cook would want to see every page on which an egg is used in a cake recipe or as a binder in lasagna. A human brain is required to decide that "egg" is a major ingredient in a frittata, but not in chocolate chip cookies. Yes, eggs appear in most cookie recipes, but cookbook users would never search the term "egg" to find a cookie recipe, unless they were looking for a meringue cookie in which egg white is the main ingredient. Such decision-making not only requires context evaluation, it may require subject knowledge as well. Computers can be programmed to recognize terms in context, and automated keywording is being used today when information overload requires automation. However, such systems are not able to analyze text for meaning or aboutness, and the rules they follow are still determined by a human brain.<sup>14</sup>

A concordance misses another hallmark of a well-prepared index by presenting long strings of unanalyzed page references. Entries in a user-friendly index should display no more than five or six page references at any main heading. More references require subentries. Readers are quickly frustrated when required to look at a dozen or more pages to find what they seek. Index subentries allow

readers to quickly preview a book's contents before buying the book or to find a specific fact they remember reading. A couple of examples illustrate the point.

Consider the following index entry:

blood pressure, 2, 4–5, 7, 45–46, 57, 60–61, 80–85,  
70–73, 250, 252, 254, 342–343, 345, 348,  
350, 352

Would a reader have the patience to look through all those pages to find blood pressure reference ranges or cardiovascular training effects on blood pressure? The index would serve a reader much better by using subentries such as:

blood pressure  
exercise effects on, 45–46, 57, 60–61, 70–73  
hypertension treatment, 80–85  
nutrition effects on, 250, 252, 254  
reference ranges, 5, 7  
screening of, 2, 4–5, 342–343  
in special populations, 345, 348, 350, 352

The next example also illustrates the need for subentries. In its suggested revision, another issue is also evident: meaning nuance. The term “toxin” has two subentries with different meanings. One subentry points to a discussion of vegetables’ protective qualities, the other to naturally occurring toxins in vegetables. A concordance wouldn’t filter these meanings for the reader.

Example with unanalyzed locators:

vegetables, 135, 137, 138, 140, 145–146, 150, 166,  
172, 175, 185–186, 193–196, 201, 210, 216,  
220, 259–261, 265, 279, 282

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Suggested revision with subentries, analyzed for meaning and meaning nuance:

vegetables

for disease treatment, 135, 145–146, 279

in healthy diet, 137, 210, 216

organic, 172, 175, 185–86, 220, 265

as protein source, 138, 140, 150

for toxin protection, 259–161, 282

toxins in, 166, 193–196, 201

A concordance lacks other qualities of an index. Since it relies on simple word matching, a concordance does not distinguish between homographs, cannot add synonyms, nor can it index inferences to concepts.<sup>15</sup>

Consider homographs (words spelled the same with different meanings and which may or may not be pronounced the same, as opposed to homonyms which are pronounced the same, have different meanings, but may be spelled differently). If asked to find the term “Washington” in a U.S. history textbook, a computer will have difficulty distinguishing between Washington State; Washington, D.C.; or George Washington. Which Washington may be clear from the context, but computers need the full term (e.g., Washington, D.C.) for accurate identification. Such undifferentiated terms in a concordance are confusing if not useless, especially when the frustrated reader gives up in the face of a slew of unfiltered references. A computer can’t distinguish between Will Rogers and his last will and testament, or between a traffic fine and David Fine—a fine mess indeed!

Computers aren’t capable of adding the necessary synonyms to an index either. A well-prepared index provides multiple points of entry, which requires use of synonyms. Necessary synonyms may not be mentioned in the text but should be included in the index. For example, a mass market trade book on health issues that refers to the Affordable Care Act, or to be exact, the Patient Protection and

Affordable Care Act, should include an index entry (or cross-reference) for Obamacare, even if that term is not used in the text. A do-it-yourself title on wiring may refer to NM cable, but many readers would look for Romex (a brand name) in the index. A children's book might discuss the signs of the zodiac without using the word astrology, but a bright child might look up that word.

When an author uses terms inconsistently, synonyms become a must in the index. Think about medical texts or consumer health books which refer to prescription drugs by both brand names and generic names. Yes, the computer could generate a list of both terms, but a quality index brings together similar terms expressed differently. To date, a computer can't do that.

Multi-authored texts present a similar issue. Different authors may use different terms for the same concept. A computer doesn't know that commuter trains and light-rail transportation mean the same thing. Yes, one could perform separate searches for each term and then reconcile the results—precisely why humans are needed to produce quality indexes!

Even if computers can be trained to recognize terms within context or be programmed to provide synonyms, we have yet to develop software that trains a computer to think so it can identify inferences to a concept. In a workshop presentation, Do Mi Stauber gave a perfect example of this failure. "The text says, 'During the 1960s, the countries of the Third World played the United States and Soviet Union against each other.' This sentence should be indexed under 'Cold War.' It's very unlikely that any computer program would do that—it takes a human brain."<sup>16</sup> Although Seth Maislin now believes that automatic keywording can succeed, he admits there are limitations of comprehension that prevent machines from writing a back-of-the-book index.<sup>17</sup>

Some argue that with the advent of ebooks, search functions make indexes obsolete. Search results are fraught with the same problems as concordances. My search for the word "bread" in an



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ebook version of a cookbook produced 184 hits (46 pages worth on my small ereader screen!). Not only did the search show me every mention of that word, it included every mention of the word “bread-crumbs.” I scrolled through several pages of search results, finding references to qualities of a good bread, uses for bread or bread-crumbs in recipes, and even the opinion that “broth is to good cooking what wheat is to bread.”<sup>18</sup> But I got frustrated before I found a single recipe for bread, which is what I was looking for. A quality index would filter these references, separating bread from bread-crumbs and showing the reader exactly where to find recipes for bread or discussions of quality store-bought breads. Although the Kindle edition of this text included a hyperlinked index, the subentries did not display in an indented format. Index navigation was difficult, especially when the subheadings continued for more than one display page. Without continued heads or the ability to see the main heading, I easily lost my place. And by the way, there were only four page references for bread in the index!

Some early ebooks converted from original print versions include the original index—with a disclaimer. The disclaimer states that the page references shown do not link to the text and suggests that the reader search the text for information on a specific topic. In other words, the useful index from the print version is rendered useless in the ebook.

Some argue that since ebooks are pageless, you can't link an index entry to a page. True, the reference can't be linked to a numbered page as in a print book, but it can be linked to a location in the text such as the specific term itself or the beginning paragraph of a discussion. Others complain that following an index link changes the ereader's progress indicator. This is true and creates an issue when syncing a text among multiple devices. If you view the index, the progress indicator thinks you've reached the end of the book. Although the indicator adjusts when you go back to your

place in the text, the place is lost for syncing. Software developers need to address this problem.

Yes, there are issues and costs in producing fully-functional hyperlinked indexes for ebooks, but solutions are available. The Digital Trends Task Force (DTTF) of the American Society for Indexing was created in 2011 to address the rapid changes in book publishing related to indexing. The group has worked diligently to promote “smart indexes” for ebooks. As a member of the International Digital Publishing Forum (IDPF), the DTTF has worked to create standards for ebook indexes. For details about this work and additional resources, visit the DTTF page on the ASI website.<sup>19</sup>

No, search is not the same as an index. Lori Lathrop’s words in 2000 still apply today: “Real indexing is simply beyond the capability of computer software. Only human indexers can intellectually analyze the material to provide end-users with a topical hierarchy, meaningful associations, and access to conceptual information.”<sup>20</sup>

### **If Computers Don't Index, Do You Still Use Index Cards?**

I don’t know of any indexers still using index cards today. However, when I first began learning to index in the early 1990s, students learned indexing fundamentals using index cards before exploring computer-aided indexing. That phrase, “computer-aided indexing,” captures the difference between human indexing and computer-generated concordances. Dedicated indexing software—software designed for professional indexers—aids in the mechanics of writing an index. It doesn’t scan text and it can’t think, but the software performs many functions that increase the indexer’s speed and accuracy. For example, it eliminates tedious tasks such as alphabetizing and checking cross-references. It can auto-complete entries, check spelling, and warn the indexer when a page number

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is missing or poorly formed. (Dedicated indexing software is discussed in more detail in Chapter 6.)

Computers and computer technology have greatly enhanced indexers' work and will continue to provide solutions to information management challenges in our rapidly changing digital world. However, indexes were being written long before the invention of computers and even long before index cards came into use.

### A Brief History of Indexes and Their Creators

Carl Linnaeus invented the index card in the mid-1760s, but exactly when indexes first appeared is the subject of some dispute.

Facts on File credits Callimachus, a Greek poet and scholar from the third century BCE, with compiling the first known finding list, providing a guide to the contents of the Alexandrian Library.<sup>21</sup> Bella Hass Weinberg cites a subject index, or alphabetic listing, for sayings of the Greek Church Fathers (*Apothegmata*) in the fourth century and Biblical concordances as early as the seventh and eighth centuries.<sup>22</sup>

Indeed, many early indexes or concordances were reference tools for religious works. While Daniel Boorstin says Hugo de St. Caro reputedly compiled a concordance of the Bible in 1247 with the aid of 500 monks,<sup>23</sup> Hazel Bell credits John Marbeck with creating the first complete concordance of the entire Bible in English, which was published in 1550.<sup>24</sup> Even prior to publication, Marbeck's work was not appreciated. He was convicted of heresy and condemned to be burned at the stake, but was later pardoned.<sup>25</sup> Pardoned, even though his work was a concordance—not an index!

The dispute over the first index is due in part to lack of clarity about what constitutes an index. Many early finding tools were concordances or lists that don't really compare to our modern indexes. The *Index librorum prohibitorum* (Index of Forbidden Books), first published in 1559, listed books deemed by the Roman Catholic Church authority as harmful to the faith or morals of

Roman Catholics. After several revisions, the version published in 1664 was the first papal index to list all books and authors alphabetically.<sup>26</sup> Contrary to today's indexes, which are finding tools, the *Index librorum prohibitorum* was a censorship tool.

According to Wellisch, the earliest index to a printed book was compiled for St. Augustine's *De arte praedicandi* and was printed in the 1460s. Many early indexes were located in the frontmatter of the book. The customary position in the back of the book became more common in the sixteenth century and has remained standard since the seventeenth century.<sup>27</sup> With the advent of ebooks, some modern indexers have called for a return to the prominent placement of the index at the beginning of the book. As part of the front matter, an index could be downloaded as part of an ebook sample, allowing readers to better assess the contents before making a purchase. In addition, index entries would display first in search results, providing readers with more valuable results.<sup>28</sup>

When printing allowed identical copies of books with page numbers to be produced, indexes became more common. By the end of the eighteenth century, indexes provided a recognized tool for information organization and retrieval.

Early indexers were scholars, although some printers no doubt performed their own indexing.<sup>29</sup> Many authors also indexed their own books until the advent of the professional indexer in the eighteenth century. When The Index Society was formed in London in 1877, all its members were men. In the late nineteenth century, women began to enter the field, sometimes only by virtue of being the wife of an author who needed an index.<sup>30</sup> These women were the original accidental indexers! Others were more deliberate. In 1892 Nancie Baily, the pioneer indexer, opened an indexing office in London. She later offered indexing training as well.<sup>31</sup> A few years later, Mary Petherbridge opened The Secretarial Bureau, which offered training in secretarial work and indexing.<sup>32</sup>

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By the twentieth century, indexing was considered an acceptable profession for women and, in fact, became predominantly a woman's profession. It still is and increasingly so. The ASI Salary Surveys

### Gotta Love It

Bev Anne Ross (1924–1995), a well-known and beloved indexer, started the Washington, D.C. and Golden Gate chapters of ASI; she established the indexing course at the University of California Extension at Berkeley and the USDA Graduate School course (now Graduate School USA); *and* she was an accidental indexer! She was given indexing duties while working as a technical editor and “got to like it.”<sup>39</sup>

show an increase of women in the field from 81.1 percent in 1997<sup>33</sup> to 86.1 percent in 2009.<sup>34</sup> In 2014, 90.64 percent of indexers surveyed for this book were women.

Despite this gender disparity, men must be given credit for founding the original professional indexing societies. Henry Benjamin Wheatley founded The Index Society, which merged with the British Record Society in 1890.<sup>35</sup> In 1956, G. Norman Knight proposed the formation of the Society of Indexers in the UK, which held its first meeting the following year.<sup>36</sup> A little more than ten years later, in 1968, the American Society of Indexers<sup>37</sup> was formed, and although Theodore C. “Ted” Hines is known as its founder, it was his student Mary Flad who first suggested the need for an American society.<sup>38</sup> Women continue to play a key role in the profession.

Just as indexes and the profession have evolved, so have indexing methods. In the late nineteenth and early twentieth centuries, indexers wrote entries on slips of paper, or on sheets of paper which were later cut apart, sorted, and pasted onto large galleys.<sup>40</sup> At some point

indexers began using index cards to write (or type) entries, sort them, and deliver them to publishers in shoe boxes, or perhaps as a typed manuscript. Index cards in perforated strips, which alleviated the need to insert individual cards into the typewriter, were one of the few innovations before the advent of computer-assisted indexing.<sup>41</sup>

In the early 1980s when computers were becoming widely used in business, indexers began purchasing them too, although dedicated indexing software wasn't initially available. Fetters describes the early days: "We used database management programs, sorting programs, word processors, and mail merge to produce indexes. It was grand!" She also describes the first dedicated indexing software, Indexing Preparation System (IPS), which was released in 1982, followed by Micro Indexing System (MIS) a few years later. MACREX made its US debut in 1984, followed by CINDEXTM in 1986. It took more than ten years for another real contender to enter the market. SKY Index was released in 1997.<sup>42</sup> These three programs, MACREX, CINDEXTM, and SKY Index, are still the top programs for creating stand-alone index manuscripts.

In an article on her switch from index cards to computer-assisted indexing, Olive Holmes describes the tasks a computer automates, including alphabetizing, punctuation, and spelling. She also points out what a computer can't do: the thinking process of creating an index. "But the indexer's mind is freed up, so to speak, to concentrate on choosing main heads and subheads, pondering the relationship of one concept to another, deciding what to put in, what to leave out, and often figuring out what the author is saying or trying to say, what the main themes are, where the text is headed, the whole process of sifting through information to find what is important and what is not, and where the emphasis should be. No computer can help there."<sup>43</sup>

It's not only indexing methods that have changed, technology has completely changed our ways of doing business. When I started my indexing career in the early 1990s, I marketed my business with cold calls to publishers. My clients called me on my landline telephone

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to schedule a job. They sent me hard copy page proofs via Federal Express or other couriers. I returned hard-copy manuscripts the same way.

The first time I sent an index to a client via email, the text had to be sent in the body of the email due to file compatibility issues. PDF was not the standard.

Today, I rarely talk to a client on the phone. All my business is conducted via email and over the Internet. I receive all my page proofs as PDFs which are emailed to me, posted on corporate servers for download via FTP, or accessed via web-based file sharing services like Dropbox. I mark electronic files and often copy index entries from those files to my indexing software. I have created embedded indexes, tagging index entries in electronic files. Colleagues are creating indexes for websites and ebooks, jobs that require not only indexing knowledge but technical skills as well.

From the time I began my indexing career in the early 1990s, indexers have discussed the effects of technology on publishing and indexing. Many predictions have come to pass; other developments yet unimagined are surely in our future. A client once assured me that there will always be print books, and indexers will always be needed to index them. That may be true in my lifetime, but the long-term future of publishing is as hard for us to envision as our current status would have been for early indexers like Baily to foretell. Certainly the publishing industry is changing more rapidly than ever before.

Mulvany's words provide a bridge from the past to the future: "The back-of-the-book index is not a relic of seventeenth-century technology, rather, it is an excellent prototype of an efficient information access device. Master the art of book indexing, and you will experience the magic of sharing knowledge."<sup>44</sup> Indexing standards and methods may change, technology may change, but sharing knowledge through information access will remain.

## Endnotes

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## About The Author



Nan Badgett, dba Wordability, has been providing indexing services to publishers, authors, and corporate clients since 1992. She has a Bachelor of Arts degree in French and was trained in indexing through the USDA Graduate School. Nan was a founding member of the former Arizona Chapter of the American Society for Indexing (ASI) and served terms as both its President and Secretary. She has served twice on the judging committee for the ASI/EIS Publishing Award for Excellence in Indexing (formerly the Wilson Award) and served as its chairperson in 2014. Badgett has contributed to several ASI books, including *Indexing for Editors and Authors* (2008). She was inducted into ASI's Order of the Kohlrabi in 2004.

Before becoming a full-time indexer, Badgett was twice an accidental indexer. As a legal assistant in a large government agency, she coded documents for entry into a computerized document retrieval system. She later worked as a corporate writer developing employee handbooks and procedure manuals for a growing retail company. The need to index those manuals helped launch her indexing career.