Praise for *Handbook of Indexing Techniques, 5th Edition*

“I welcome this fifth edition! It's the most practical and straightforward guide to the process of composing index entries and compiling a working index.”

—Kate Mertes, Mertes Editorial Services

“Beginning indexers will find a wealth of information in the *Handbook of Indexing Techniques*. Fetters provides good introductions to the variety of indexing methods, and covers everything from cards to XML to folksonomies. Students will find the extensive bibliographies very helpful.”

—Jan Wright, Wright Information Indexing Services

“Linda Fetters has written a book that covers indexing from the very beginning to the most sophisticated stages—it will help novices get started and then guide them to learn how to deal with embedded projects and ebooks. I have used this book and recommend that all indexers include it in their personal libraries.”

—Enid Zafran, Indexing Partners

“The *Handbook* is a real gem—gets right down to brass tacks in a readable, understandable manner. It will be a great deal of help to the people who will never read a longer book on the subject.”

—Jessica Milstead, The Jelem Co.

“A clear and concise guide to the essentials of indexing … the perfect choice for a novice indexer, authors desiring to index their own work, or document specialists needing to index their organizations’ materials. If you are considering indexing as a career, this handbook will help you make up your mind.”

—Frances S. Lennie, Indexing Research,
    Theodore C. Hines Award Winner,
    and 2X ASI President
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Chapter 1

Learning to Index

In the past 20 years, there have been an increasing number of people who are interested in becoming indexers. Some have experience in the publishing field. Some are women who want to work at home on a part-time basis while they also care for their children. Others want to join the working-at-home revolution set in motion by the availability of personal computers with communication links. Professional indexers and members of the American Society for Indexing (ASI) receive numerous phone calls and emails from people asking how to get started. Before thinking about the business aspects of self-employment, prospective indexers should first consider how to learn their intended craft.

If you are reading this book because you have to write an index right away, skip this chapter and go to Chapter 2.

Formal Courses and Seminars

Some schools of library and information science offer courses in indexing and abstracting. You can get a list of these schools from your public library or the internet. You can contact the school nearest you for requirements. Extension programs at some universities include courses in indexing that are open to people who are not enrolled in regular courses at the university.

The ASI website (www.asindexing.org) maintains an up-to-date list of conferences, workshops, and seminars related to indexing. The easiest way to get to this list is to use the A–Z index and click on the entry for Courses and Workshops. The list includes several tutorials and/or workshops offered by experienced indexers.
Distance Education (Correspondence Courses)

American Society for Indexing Training Course in Indexing

ASI provides an indexing training course available on the ASI website. It was adapted under license from Britain’s Society of Indexers (SI) distance learning course and offers:

- Self-paced learning through three separate units
- Comprehensive coverage of all aspects of indexing and related activities
- Descriptions from experienced indexers on how they work
- Practical self-assessment exercises to prepare you for real-world indexing projects
- Interactive exercises to test your understanding of what you have studied
- Content based on International Standard (ISO 999) guidelines and *Chicago Manual of Style* recommendations

Each unit takes approximately 40–50 hours of study and practice. On completion of each unit, students may choose to be examined. To qualify for the Certificate of Completion in Indexing Training from ASI, candidates must:

- Successfully meet the requirements of the examinations
- Complete all three units and their associated examinations within a 3-year period

Complete information is available at ASI’s website, www.asindexing.org.

Society of Indexers Distance Learning Course

The SI describes its distance learning course, “Training in Indexing,” on its website (www.indexers.org.uk) as “consisting of four assessed modules plus a practical indexing assignment and three online tutorials.” The modules include:

- Module A. Introducing Indexing: indexers, users, and documents
- Module B. Choosing the Words: term selection and the formation and arrangement of headings and subheadings
Trainees are required to undertake three online tutorials, working with a small group of other trainees. For each tutorial, they compile an index to a short text, compare their results, and receive feedback from an experienced indexer.

**Graduate School USA**

Graduate School USA, formerly the U.S. Department of Agriculture Graduate School, provides continuing education for government workers in Washington, D.C., but it also offers a wide variety of distance learning courses that are not restricted to civil service employees.

The school offers two correspondence courses for indexers: “Basic Indexing” and “Applied Indexing.” These courses are prepared and graded by experienced ASI members. They provide much needed feedback on your progress in learning to index. Complete information on all courses can be found at www.graduateschool.edu. You may also call its toll-free phone number, 888-744-GRAD, or email customersupport@graduateschool.edu.

**University of California–Berkeley**

University of California–Berkeley offers an online distance learning course, “Indexing: Theory and Application.” The course is intended for people interested in becoming freelance indexers, as well as for authors who want to index their own work. Requirements for the course are outlined at www.unex.berkeley.edu/cat/course394.html.

**Self-Training**

In the first edition of the ASI publication *Starting an Indexing Business*, new indexers reported that they learned how to index by taking courses and by several other methods. A few reported apprenticing themselves to experienced indexers who are willing to serve as mentors. A Google search of the keywords mentoring, indexers, or indexing reveals a few indexers who offer mentoring services (and you can find several on the ASI website.
listed under Courses and Workshops). Others learned on their own by finding and studying indexing textbooks, publishers’ style guides, and indexing standards. You can find more information in both the Standards and Textbooks sections of the Classified Bibliography at the end of this book. In addition, you can learn from other indexers by participating in internet discussion groups, described in the next section. You can also learn by writing practice indexes for books with existing indexes and then comparing your index to the original, as is described in Writing and Studying Indexes on page 5.

Internet Discussion Groups

Although not strictly a method for learning how to index, discussion groups (mailing lists) can be very helpful for beginning indexers. ASI’s website lists current indexing discussion groups as well as many more related groups. The following groups may be the most helpful for new indexers.

INDEX-L

INDEX-L is open to anyone interested in indexing. To get an idea of the kinds of topics discussed, go to www.indexpup.com/index-list/faq.html and read through the archives. The FAQ also contains instructions for subscribing and unsubscribing.

Indexers’ Discussion List

Indexers’ Discussion List is open to indexers of all skill levels and interests. Any topic related to the practice and business of indexing is open for discussion in a casual, friendly atmosphere. Subscribe through Yahoo! Groups by sending an email to indexersdiscussionlist-subscribe@yahoo groups.com.

IndexPeers

Very often indexers have little or no opportunity for feedback on their indexes. Through IndexPeers (www.finance.groups.yahoo.com/group/IndexPeers), indexers volunteer to review each other’s edited indexes. By
reviewing and being reviewed, indexers increase their awareness of good indexing technique and gain valuable feedback on their skills.

**IndexStudents**

According to the IndexStudents website (www.indexstudents.com), “IndexStudents is a community for all persons interested in discussing issues related to learning to index books, magazines, databases and the World Wide Web.” Discussion revolves around a variety of issues including the Graduate School USA courses, video instruction, SI courses, college courses, starting a freelance indexing business, marketing, time management, continuing education, and indexing procedures. Beginning and experienced indexers as well as course instructors/teachers are the intended audience for this list, but experienced indexers are encouraged to participate by offering insight to beginners. The list has a number of sporadic or regular education exercises, including practical experience with term selection, index editing, and topic of the week discussions.

**Writing and Studying Indexes**

The best way to learn indexing is to index. If you don't have any means of getting feedback on your indexing efforts, find a book you like and create your own index for it. Compare your index to the one in the book. Be aware that the index of the book may not have been written by a professional indexer. Also, remember that two people seldom index the same way. Studies have found very little consistency between terms chosen by different indexers for the same document (Markey 1984; McMaster 2012). You can learn a great deal, nevertheless, by comparing your indexing style with that of other indexers.

An interesting contemporary study of the thought processes involved in indexing and how two different indexers approached indexing the same book is available in a book written by Sherry Smith and Kari Kells, *Inside Indexing* (2005). You can view the table of contents and chapter summaries for this book as well as the two indexes produced by the authors at www.insideindexing.com.

Studying the indexes of award-winning indexers is another method for learning how to index. ASI/H.W. Wilson Award winners are listed on ASI’s website. You may be interested in reading about some of the award winners
and what they have to say about indexing. Articles from ASI’s newsletter *Key Words* can be found in the ASI/H.W. Wilson Award Winners section of the Classified Bibliography.

Another way to get some practice is to volunteer to write an index for an institution or organization in your area. Most libraries have projects languishing in boxes for lack of staff. Many corporations have minutes of board meetings or research reports for which they would love to have an index. Once you complete such a project, you have a published index to list on your résumé.

Every freelance indexer now in business has faced the same hurdles: learning to index and finding the first job. Studying, determination, hard work, and luck boosted them along the road to self-employment as indexers. Several articles in *Key Words* and two ASI booklets address this topic and are listed in the Marketing section of the Classified Bibliography.

**Professional Organizations**

Since indexers are generally few and far between, you can find a great deal of support by joining an indexing society. Following is contact information for some organizations for English-speaking indexers:

American Society for Indexing (ASI)
10200 West 44th Avenue, Suite 304
Wheat Ridge, CO 80033
Phone: (303) 463-2887
Fax: (303) 422-8894
Email: info@asindexing.org
Website: www.asindexing.org

Australian and New Zealand Society of Indexers (ANZSI)
P.O. Box 5062
Glenferrie South VIC 3122
Australia
Email: ANZSIinfo@anzsi.org
Website: www.anzsi.org

Indexing Society of Canada/Société Canadienne d’indexation (ISC/SCI)
P.O. Box 664
Membership in ASI includes a subscription to *Key Words: The Bulletin of the American Society for Indexing*, membership in one regional chapter, and optional membership in one or more special interest groups. ASI sponsors one annual conference per year; local chapters hold one or more meetings per year. Information on chapters and their activities appear in each issue of *Key Words* as well as on ASI’s website.

ASI publishes a variety of books about indexing in conjunction with the publisher of this book, Information Today, Inc. (books.infotoday.com/books/index.shtml#index).

### Standards and Index Evaluation

Indexing preparation standards are available from several organizations. The international standard, *Information and Documentation Guidelines for the Content, Organization and Presentation of Indexes* (ISO 999:1996), can be obtained from the International Organization for Standardization (ISO). It is very expensive, however, so you might want to check with your local library for a copy. Two articles in *The Indexer* summarize and discuss the practical use of ISO 999 and other standards (see Booth 1997 and Calvert 1996 in the Standards section of the Classified Bibliography).

BSI British Standards (formerly the British Standards Institution) has removed two of its former standards related to indexing, BS 3700:1988 and BS 6529:1984, and instead sells ISO 999:1996. However, BS 1749:1985,
Recommendations for Alphabetical Arrangement and the Filing Order of Numbers and Symbols is still available. Other areas of interest include standards for thesaurus development and records management.

The National Information Standards Organization (NISO) sells several books of interest to indexers, including Guidelines for Indexes and Related Information Retrieval Devices by James D. Anderson and Guidelines for Alphabetical Arrangement of Letters and Sorting of Numerals and Other Symbols by Hans H. Wellisch.

Following is contact information for ISO, BSI, and NISO:

International Organization for Standardization
1 ch. de la Voie-Creuse
CP 56
CH-1211 Geneva 20
Switzerland
Email: central@iso.org
Website: www.iso.org

BSI British Standards
389 Chiswick High Road
London W4 4AL
United Kingdom
Email: cservices@bsigroup.com
Website: www.bsigroup.com

National Information Standards Organization
One North Charles St.
Suite 1905
Baltimore, MD 21201
Phone: (301) 654-2512
Website: www.niso.org

For more information on standards and index evaluation, see those sections of the Classified Bibliography.
ASI/H.W. Wilson Award

One objective of ASI is “to promote excellence in indexing and to increase awareness of the value of well-written and well-designed indexes.” One of the ways ASI does this is by offering, in conjunction with the H.W. Wilson Company, the ASI/H.W. Wilson Award for “excellence in indexing of an English language monograph or other nonserial publication published in the United States during the previous calendar year.” The criteria are reproduced on the next few pages, with permission from ASI. The criteria, as well as the mechanics of the award process, are published on ASI’s website.

Criteria for the ASI/H.W. Wilson Award

Substance

Elegance

Succinctness; the right word in the right place—even if the word isn’t found in the text; “a certain charm”; visual appeal; a sense that the index contains exactly what it needs to, no more, no less; simplicity; grace. Elegance is the quality that makes an exceptional index more than the sum of its parts.

Usability

• Does the index appropriately anticipate the needs of its users?

• Are the significant concepts indexed?

• Are there appropriate alternative terms for accessing concepts?

• Are special treatments such as italics and boldface appropriate to the complexity of the material and the needs of the user?

• Is there a headnote explaining special treatments?

• Does the format provide for ease in visually scanning the index?

• Is the phrasing of entries and subentries clear, with significant terms first and no unnecessary prepositions?
**Coverage**
- Does the index cover the ground? Does it do so in an evenhanded fashion?
- Look up a few important topics to see if coverage is adequate.
- The index should go beyond listing the main headings in each chapter or rearranging the table of contents.
- Significant concepts should be indexed, and scattered discussions of a concept should be brought together.
- Irrelevant information, such as scene-setting material or passing mentions, should not be indexed.
- There should be no apparent indexer bias.

**Analysis**
- Are main entries analyzed appropriately into subentries?
- Are subentries overanalyzed so that the same page numbers are repeated again and again in close proximity to one another?
- Are there strings of undifferentiated locators at an entry?
- Are the number and level of subentries appropriate to the complexity of the book?

**Access**
- Is there more than one access point to significant concepts?
- The index should use the author's vocabulary but should also provide alternative terms and cross-references that will give the reader access.
- Entries should be “flipped” where necessary or appropriate.

**Cross-Referencing**
- Are cross-references adequate and useful?
• See also references should send readers to appropriate related material. (Double-posting is preferable to See references that send the reader to an entry with very few page references.)

**Mechanics**

**Accuracy**

• There should be no misspellings or typos, no odd page ranges or references out of order.

• Alphabetization of main entries, subentries, and cross-references should be correct.

• Punctuation should be correct.

• Forms of names and terms should be correct and appropriate to the field of specialization.

• Cross-references should neither be circular nor point to missing or differently worded entries.

• “Flipped” entries should have the same page references at both locations in the index.

**Style**

• Is the style consistent throughout?

• Does the style effectively resolve challenges presented by the text?

• Look at such style points as sorting order, punctuation of cross-references, leading and separator punctuation of locators, abbreviation of inclusive ranges, positioning of cross-references, run-in vs. indented subentries, capitalization of main entries, and use of alternative typefaces.

[The descriptive categories included here are freely adapted from Carolyn McGovern’s “How to Evaluate Indexes” (1993).]

For more information on the topics discussed in this chapter, see the following sections of the Classified Bibliography:
• ASI/H.W. Wilson Award Winners
• Index Evaluation
• Learning to Index
• Marketing
• Standards
• Textbooks

Works Cited


About the Author

Linda K. Fetters has been a freelance indexer for more than 25 years, specializing mainly in biomedical publications and computer manuals. Her book, *A Guide to Indexing Software*, was a best-seller for the American Society for Indexing (ASI; previously the American Society of Indexers) for many years. In addition, her articles on indexing and indexing software have appeared in *Database*, *Key Words: Bulletin of the American Society for Indexing*, *The Indexer*, *Library Software Review*, *ONLINE*, and *Small Press* magazines. She has served ASI in the positions of corresponding secretary, vice president, president (1992–1993), and administrator. She received ASI’s Theodore C. Hines Award for Continuous Dedication and Exceptional Service to ASI in 2001.
If you enjoyed reading this chapter of *Handbook of Indexing Techniques, Fifth Edition* please visit our bookstore to order a copy.

ITI Bookstore: http://books.infotoday.com