

Indexing: the ideal cottage industry.

Introduction

Changing attitudes to the place of work in our lives, and the places we work, are opening up new opportunities for those of us who like independence. For some, it is new technology which enables them to work from home. Others, like indexers, have been doing it for a long time.

Indexing is a profession allied to cataloguing, but with a very different career structure. Indexers have worked from home since the days of index cards in a shoebox; most now use computers to work on, but still depend on couriers and the postal service for delivery. Some are full-timers, with business premises and business procedures. Others work full-time in related jobs, and index occasionally because it is a pleasure and a challenge.

Nearly all agree that it is a wonderful job: a chance to work with ideas, to be a part of the publishing process, and to work at your own time and place.

Indexing and cataloguing

Indexing of books, journals, pictures, or other items is closely related to subject cataloguing. Indexers and cataloguers both examine materials to see what they are about, and then briefly describe the information so that people can access it. Indexers and cataloguers both need broad general knowledge, and the ability to analyse a vast range of subjects. (Or, if they specialise, the ability to analyse one field in depth).

One big difference is in the scale of the work: while cataloguers usually work with whole books, indexers work with smaller portions of information. A cataloguer may allocate five subject headings per book; an indexer five entries per page. Another difference is that book indexers can choose which words to use in the index, whereas cataloguers usually select terms from a thesaurus or list of subject headings. A book indexer uses the terminology of the book where possible, but nearly always has to choose between variant terms which have been used to describe the same subject. The book indexer also decides which subdivisions to use with which headings, and adds references from other terms which they think might be consulted. The subdivision structure and references used are unique for every book.

Periodical database indexing is closer to cataloguing, as database indexers usually choose terms from a controlled vocabulary, although they may also be able to add uncontrolled terms and create new controlled terms as needed. Occasionally the same controlled vocabulary is used for indexing and cataloguing. For example, MeSH (Medical Subject

Headings) are used for cataloguing books in medical libraries, and for indexing articles for the Medline database.

Periodical database indexers must also pay attention to consistency in the indexing of names; this is akin to name authority control in cataloguing. The Anglo-American Cataloguing Rules(1) (AACR2) are quoted in the indexing textbooks *Indexing from A to Z*(2) and *Indexing Books*(3) in the sections on indexing names. Indexers who are also librarians are most likely to be influenced in their decisions by AACR2 rules.

There is also a significant difference in the career options of indexers and cataloguers. Cataloguers have traditionally worked in libraries, often in groups. Some cataloguers work for companies which provide a cataloguing service to libraries. Indexers, on the other hand, tend to be freelancers working alone, and often combine indexing with some other work. There are a few full-time indexers in Australia, working as freelancers or for publishing companies or other organisations.

As more cataloguing is contracted out by libraries, there will be more opportunities for cataloguers to set up their own companies, or to work as freelancers. The loss suffered by cataloguers when work is contracted out by their library against their will, may be balanced to some extent by the gains of the entrepreneurial cataloguers who pick up the work. It is also probable that indexers will find that the nature of their work changes. As the use of computers in indexing (especially database indexing) increases, there may be less work available for indexers working at home, alone, and more work of a developmental and consultancy nature.

Book indexing is part of the publishing business, and indexers are more likely to need business skills than library cataloguers are, although both would at times be trying to provide the best service to users under financial constraint. As contract cataloguing develops, there will be more need for cataloguers to develop business skills too.

Indexing's association with publishing also means that indexers are involved in the making of a book, while cataloguers are involved only after publication. One indexer said to me that she felt indexing was closer to writing than it was to cataloguing.

Cataloguing requires a library qualification such as a degree or diploma in librarianship, or possibly a library technician associate diploma. Indexing requires no qualifications, although most indexers have at least one university degree, as well as experience in a variety of jobs. Indexing is such an unknown occupation, that it is something most of us have fallen into by chance. We consider ourselves fortunate to have discovered work which is ideally suited to our temperaments.

Indexers' backgrounds, and related fields of work

Indexers learn about the work through librarianship, through publishing, or through friends and family. (Apart from some librarians, and people involved in publishing, I believe the only people who know that a person is involved in the creation of an index are the family and friends of indexers.)

Many information management (librarianship) courses offer indexing as an elective, and indexing courses are advertised in library periodicals.

Editors, and others involved in the publishing process, commission indexes, and sometimes become indexers themselves (they often produce their first index because of some disaster which meant there was no time to find an indexer).

Just as indexers often come to the field from librarianship and publishing, so might they discover other fields while working as indexers. There is some movement from indexing to copy-editing and proofreading, and I know of one indexer who is also a bibliographer. Some indexers also do indexing training in continuing education (professional development) courses offered both on-site and by correspondence.

Indexers also discuss the possibilities involved in the indexing of the Internet.

The indexing process

Indexers work with books, periodicals, databases, pictures, or business records. The skills of subject analysis, description of topics, and classification are broadly applicable.

Book indexing:

The indexing process starts when the editor or author of the book telephones the indexer to discuss a book index which is needed. The indexer finds out about the book (subject, length, level of indexing, deadlines) and may tentatively accept the project. The editor then usually sends the page proofs, or a sample of them, so that the indexer can give a definite quote (or a maximum if they are working on an hourly rate). Ideally a contract or letter of agreement is signed at this stage.

The indexer then goes through the page proofs highlighting key words and context words in the text, and may make notes of synonyms and other features of the terminology to be used. To decide whether to index a term or concept I ask myself: "If I looked up that term in the index, would I be pleased to find this information?"

The book is occasionally available on floppy disk (especially from non-commercial publishers), but it is still easier for most indexers to print out the document so that they can highlight it in a paper copy. The electronic copy is useful for checking to see if all occurrences of a topic have been indexed (this is most useful when the indexer only decides to include a topic when half way through the book).

The next step is to enter the chosen terms. Most indexers use a specialised indexing package such as Macrex or Cindex, or a general program such as MS-Word, WordPerfect, Pagemaker or Framemaker. A few book indexers still use cards in a shoebox, and database indexers may enter terms onto a worksheet. Framemaker and Pagemaker are used for embedded indexing, in which the index terms are inserted in the text. If the text or pagination changes (for example in a new version of the book) the index terms are automatically adjusted to the new pagination. Embedded indexing is commonly used for computer manuals, and other books which might have a short life span, but many versions.

Specialised indexing software saves time on entry and editing, and allows you to view the index in page number order (for checking) and alphabetical order. Editing the index to ensure consistency of headings, to organise subdivisions and to add and check references is very time-consuming – perhaps taking up 30% of total indexing time.

After printing the final index it is helpful to have someone else check it. There are always typographical errors and other inconsistencies at this stage! The index is then copied onto a floppy disk, a covering letter is written, and it is all carefully packaged and posted. Most publishing companies use couriers, however Express Post through Australia Post is also quick, and is a cheaper way to send documents.

Although most publishers and indexers use computer technology, the page proofs and final index are usually sent through the post, rather than electronically. This is changing, with a few publishers now willing to accept indexes electronically. As indexing is nearly always done to such a strict deadline, saving a day or two in the transport process means that there is a day or two more available for the indexing.

Non-book indexing:

Non-book indexing is different to book indexing in both the timing of the work and the way it is done. Non-book projects such as database indexing tend to be ongoing (possibly without such strict time pressures) and follow rules and terminology which ensure consistency over time and between different indexers. Database indexing is also shallower than book indexing. The indexer must glean the subject from the title, abstract and headings, rather than by reading the whole item. This can make it more frustrating than book indexing as the indexer has moved on to a new item before they have fully comprehended the last one.

Indexing as a small business

Indexers must develop small business skills as well as professional skills. Initially these involve getting work, and later keeping a steady supply of satisfying work. The ability to quote appropriately is essential to making the best possible living, as are business practices such as ensuring prompt payment of invoices. Indexers vary in the formality with which they work, but are encouraged to sign at least a letter of agreement for every job.

Some indexers have enough work to employ staff or to subcontract, but most work alone, and usually part-time. There is, however, a lot of informal communication, and indexers who are unable to do a job will pass it on to someone else.

Most indexers also have to be familiar with the basics of computing, as they will probably one day buy a computer and have to learn the appropriate software packages. Many indexers also communicate with other indexers through the Internet, particularly through newsgroups such as Index-L.

Going freelance

There is an inspiring, although now somewhat dated, book called *What else can you do*

with a library degree?(4), in which many librarians discuss non-traditional library careers which they have followed. Many of these librarians worked as freelancers, and they discuss the advantages and disadvantages of the freelance option. A number of these librarians combined indexing work with other library-related consultancy.

The advantages of freelancing include the chance to work for yourself, often from home; to follow your own ideas; to choose your own hours and projects; and to be rewarded for the work you do. The disadvantages are that you can become isolated; you lose the security of a permanent job; and you lose all the perks of permanent employment such as paid training in work time. Freelance work can fit in well with children, although it is demanding work, and can't be done with half your mind on something else.

Indexing work is normally very flexible, as the indexer can choose whether or not to accept work at any time. Book indexes normally take from one to three weeks, and database indexing can often be scheduled in advance. One of the satisfactions of book indexing is that it is easy to complete one task, and move on to the next one. (In cataloguing each item is completed more quickly, but others usually await on the backlog shelves). On the other hand, the work can also be very stressful, because the indexer is given very little time to complete it. Scheduling more than one job at a time is also difficult. Most indexers spend many nights working after midnight when work is due.

Indexing requires a broad general knowledge, logical mind, and good organisational skills, but because it doesn't require any specific qualifications, it seems to be work that is readily passed on to other members of the family. There are a number of indexing families where wife and husband both index. My husband and I share indexing work, and even our five-year old son has a ring binder full of pictures which he calls his index!

Information on indexing

There are not many indexers in Australia, but there is an active society of indexers (AUSSI) with branches in Melbourne, Sydney and Canberra. Members meet to discuss theoretical and practical issues to do with indexing. Members are also very supportive, and often pass on work when they are busy. Details of AUSSI and the relevant societies in the U.S., Canada and Britain, as well as much interesting reading, can be found in the quarterly journal *The Indexer*.

The textbooks *Indexing from A to Z*(2) and *Indexing Books*(3) give a good introduction to the subject, and other useful information can be found in conference proceedings(5). For those on the Internet, the INDEX-L newsgroup is a great source of moral support and advice.

References:

1. Anglo-American cataloguing rules. 2nd ed. 1988 revision. Ottawa: Canadian Library Association; Chicago: American Library Association; London: Library

Association, 1988.

2. Wellisch, Hans H. Indexing from A to Z. Bronx, New York: H.W.Wilson Company, 1991.=20
3. Mulvany, Nancy C. Indexing books. Chicago, Illinois: University of Chicago Press, 1994.
4. What Else Can You Do With a Library Degree?, ed. Betty-Carol Sellen. Syracuse, New York: Gaylord Professional Publications in association with Neal-Schuman Publishers, 1980.=20
5. Indexers - Partners in Publishing. Proceedings from the First International Conference, Friday March 31 to Sunday April 2, 1995, Marysville, Victoria, Australia, ed. M. J. McMaster. Victoria: Australian Society of Indexers, 1995.=20

Jonathan Jerney & Glenda Browne, Blaxland NSW Australia

E-mail - jonathan@magna.com.au Web - <http://www.magna.com.au/~jonathan>

This document may be circulated freely with the following statement included in its entirety:

Copyright Jerney, Jonathan and Browne, Glenda 1996.

This article was originally published in
_LIBRES: Library and Information Science
Electronic Journal_ (ISSN 1058-6768) June, 1996
Volume 6 Issue 1/2.

For any commercial use, or publication (including electronic journals), you must obtain the permission of the authors:

Jonathan Jerney & Glenda Browne, Blaxland NSW Australia

E-mail - jonathan@magna.com.au Web - <http://www.magna.com.au/~jonathan>

To subscribe to LIBRES send e-mail message to

listproc@info.curtin.edu.au

with the text:

subscribe libres [your first name] [your last name]

Return to [Contents Page](#)

Return to [Libres Home Page](#)

This page is maintained by Derek Silvester, Dept of Information Studies, Curtin University of Technology, Perth, Western Australia.

Please sent comments and suggestions to Derek@biblio.curtin.edu.au

CRICOS provider code: 00301J