

X477 – Indexing: Theory and Application Syllabus

Module 1: Introduction

With advances of computer technology, and with the publishing industry's norm of freelancers working from home, indexing has become a viable career choice for many. In this module, we will critically examine the realities of an indexing career. Then you will be introduced to the basic terminology you'll need to take part in this course and begin your exploration of the practice of indexing.

Indexing is now a global industry so, along with U.S. indexing practices, information on the **Australian and Canadian indexing industry**, have also been included in this course.

Learning Objectives

Upon completion of this module, you should be able to:

- discriminate between the realities and the myths of an indexing career
- explain what an index is and what it is not
- use basic indexing terminology

Topics Covered

- 1.1. The Five Fatal Myths of Indexing
- 1.2. What Is an Index?
- 1.3. Main Headings
- 1.4. Subheadings and Sub-subheadings
- 1.5. Index Structure: Indented, Run-in, and Blended Formats
- 1.6. Reference Locators
- 1.7. Cross-References
- 1.8. Double-Posted Entries

Module 2: Creating a Basic Index

In this module, you will begin to learn three indexing software programs: MACREX, CINDEK, and SKY. Using these programs and provided text, you will practice building a basic index structure of main headings, subentries, and cross-references.

The course Web site has downloads for all three software programs and includes user guide documentation. Technical support will be available to you through the CINDEK, MACREX, and SKY tech supports for the duration of your enrollment in this course.

Learning Objectives

At the end of this module, you will be able to

- operate three indexing software programs at a basic level
- use indexing software to build a basic index structure with main headings, subheadings, and cross-references
- identify and implement the two sorting orders (word-by-word and letter-by-letter) used in an index

Topics Covered

- 2.1. Index Structure
- 2.2. Identifying Main Headings
- 2.3. When to Use General Main Headings
- 2.4. Identifying Subheadings and Sub-subheadings
- 2.5. Sorting
- 2.6. See Cross-References
- 2.7. See also Cross-References
- 2.8. See under Cross-References
- 2.9. General Cross-References
- 2.10. Indexing Software
- 2.11. File Formats
- 2.12. Indexing Exercise 1

Module 3: Term Selection

Term selection is the most challenging part of indexing. In this module, you will learn the steps involved in selecting the appropriate main headings and subentries of an index.

Learning Objectives

At the end of this module, you will be able to

- identify the metatopics and subtopics of the text
- articulate the metatopics and subtopics as main headings and subentries in the index
- explain the term selection process for writing indexes

Topics Covered

- 3.1. Introduction to Term Selection
- 3.2. Comprehension of the Material
- 3.3. Asking the Information Questions
- 3.4. Indexing "Humpty Dumpty"
- 3.5. The Importance of Good Term Selection
- 3.6. Identifying Metatopics and the Meaning of the Text
- 3.7. Concepts and Thematic Relationships
- 3.8. Identifying Thematic Relationships
- 3.9. Indexing Exercise 2

Module 4: Indexing Specifications

A professional indexer is expected to understand and anticipate the requirements of clients. Different clients have different requirements for indexing specifications and formats, depending on the kind of book and the needs of the publisher.

In this module, you will be introduced to information on the different formats for name/author, scripture, poem, and locorum (classical citation) indexes. Emphasis will be on the indexing specifications made by university, professional book, textbook, and tradebook presses. In addition, you will be given material on the use of diacritics (accent marks) and will use indexing software to insert diacritics into provided indexes.

Learning Objectives

At the end of this module, you will be able to

- recognize the different format requirements for name/author indexes, scripture indexes, poem indexes, and locorum indexes
- correctly punctuate and format legal citations as well as music, book, movie, and poem titles
- use indexing software to insert diacritics (accent marks) in foreign names/words
- identify the audience for different types of text and select terms with that audience in mind

Topics Covered

4.1. Text Type and Audience

4.2. Determining Your Audience

4.3. Indexing Specifications Issues

- scholarly
- textbook
- trade book
- documentation
- journals

- 4.4. Scripture and Locorum Indexes
- 4.5. Poem and Song Indexes; Musical Titles
- 4.6. Introduction to Name/Author Indexes
- 4.7. Name/Author Indexes for Specific Text Types
- 4.8. Special Issues in Indexing Names
- 4.9. References for Names
- 4.10. Diacritics
- 4.11. Using Software to Create Name/Author Indexes
- 4.12. Indexing Exercise 3

Module 5: Writing a Full-Length Index

You are now ready to index your first project. With the skills and techniques you have learned in earlier modules, you will use the text provided to write a complete index.

Learning Objectives

At the end of this module, you will be able to

- apply the principles of term selection and thematic relationships, as discussed in previous modules, to build a strong index structure
- write a full-length index using indexing software

Topics Covered

5.1. Example of the Indexing Process

5.2. Indexing Project 1

Module 6: The Business of Indexing

Over the course of an indexing project, an indexer will need to communicate and interact professionally with clients. In this module, we will introduce and discuss the various business issues involved in every indexing project.

Learning Objectives

At the end of this module, you will be able to

- understand the stages of the indexing project from a business standpoint from the initial contact by an editor to delivery of the index file
- explain the differences between an independent contractor and an employee
- visualize and accomplish the index editing and proofing tasks

Topics Covered

- 6.1. Indexing Project Process: An Overview
- 6.2. Receiving an Indexing Request
- 6.3. Agreeing to a Fee Structure
- 6.4. Indexing Specifications
- 6.5. Arranging Due Dates
- 6.6. Complying with IRS Independent Contractor Criteria
- 6.7. Receiving Page Proofs
- 6.8. Estimating Index Size
- 6.9. Indexing the Text
- 6.10. Editing and Proofing the Index
- 6.11. Delivering the Index
- 6.12. Indexing Exercise 4

Module 7: Developing Your Own Process and Style

Before beginning your second full-length indexing project, you will review the indexing processes of three experienced indexers.

An essential element of competent indexing is having a comfortable yet efficient indexing process. As you work to complete this module's indexing assignment, focus on what steps you are taking to ensure that all the text topics are covered in the index, that the entries have logical and thematic relationships to one another, and that the index information is easily accessible. You will also be instructed on how to handle the problem of repaginating an index when there has been a reflow of pages due to an author change to the text.

Learning Objectives

At the end of this module, you will be able to

- understand that every indexer develops her or his own approach to the indexing process
- appreciate the importance of having an ergonomically correct workstation
- apply the principles of term selection and thematic relationships, as discussed in previous modules, to build a strong index structure that contains conceptual topics

Topics Covered

- 7.1. The Individuality of the Indexing Process
- 7.2. Process for Indexing Expert A
- 7.3. Process for Indexing Expert B
- 7.4. Process for Indexing Expert C
- 7.5. Home Office Issues
- 7.6. Indexing Project with Repagination Exercise

Module 8: Putting It All Together

In this module, you will complete your final indexing project, which will be considerably longer and more challenging than the others. To write a satisfactory index, you will need to consolidate the pertinent instructions given throughout this course, including how to select conceptual metatopics to create a strong index structure with logically arranged thematic relationships.

Learning Objectives

At the end of this module, you will be able to

- discuss the differences between mentoring, apprenticeships, and subcontracting
- obtain an EIN (Employer Identification Number) and understand the advantages of using it instead of a Social Security Number
- apply the principles of term selection and thematic relationships, as discussed in previous modules, to build a strong index structure that contains conceptual topics
- Australia: Australian students will learn about the Australian Business Number (ABN) used by the Australian Taxation Office.
- Canada: Canadian students will learn about the Business Number used by the Canada Revenue Agency.

Topics Covered

- 8.1. Mentoring, Apprenticeships, and Subcontracting
- 8.2. Tax ID Information, EIN, and ID Theft Protection
- 8.3. Marketing and Building a Client Base
- 8.4. Excellence in Indexing
- 8.5. Indexing Project 3

Module 9: Embedded Indexing: Indexing a Web Site

While indexing theory is the same for creating both stand-alone and embedded indexes, the technical applications are quite different. In this module, you will be introduced to embedded indexing in Word, FrameMaker, and web documents, as well as how to write an index for a web site.

Learning Objectives

At the end of this module, you will be able to

- visualize the steps in creating an embedded index in Word, FrameMaker, and Web documents
- visualize the steps in creating a Web site index
- write a simple embedded index in Word

Topics Covered

- 9.1. Embedded Indexing Using Word
- 9.2. Indexing Exercise 5
- 9.3. Embedded Indexing Using FrameMaker
- 9.4. A Quick Look at Indexing in FrameMaker
- 9.5. Setting Fees for Embedded Indexing
- 9.6. Indexing a Web Site
- 9.7. Embedded Indexing Using HTML Indexer

Module 10: Controlled Vocabularies and Database Indexing

This module provides an introduction to the creation and use of controlled vocabularies, as well as basic information about database indexing.

Learning Objectives

At the end of this module, you will be able to

- explain what controlled vocabularies are
- identify the different types of CVs and understand how they are used
- create a simple thesaurus from given terms
- be familiar with basic concepts of database indexing

Topics Covered

10.1. Controlled Vocabularies: Finding and organizing information

10.2. Types, Formats, and Uses of Controlled Vocabularies

10.3. The Process of Creating Controlled Vocabulary

10.4. Database Indexing

10.5. Indexing Exercise 6: Creating a Thesaurus

10.6. A Last Word