American Society of Indexers

Summary of the Proceedings of the A.S.I. First Annual All-Day Meeting, 6th May, 1972

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Morning Session

**Topic**: Indexer Training Courses Outside the University Setting.

**Speaker**: Ann McDonald, Librarian, Metropolitan Transportation Authority; Lecturer on Indexing, Ballard School, YWCA.

**Summary**:

The Ballard School of the YWCA in New York City offers an indexing course aimed primarily at training non-librarians in the techniques of subject analysis, classification, and the indexing of written materials. The course structure includes both lecture and practice workshop periods.

The course was originally established approximately 20 years ago in response to a need expressed by members of the Special Libraries Association. Its more than 1,000 graduates now hold jobs that range from the simple indexing of business correspondence to the classification of vertical file materials in libraries and regular book and periodical indexing.

There are few if any similar courses given outside the university setting in the United States, except for courses given by specific institutions and organizations to train their own employees.

**Topic**: Indexer Training Courses in Colleges and Universities.

**Speaker**: Theodore C. Hines, Associate Professor, Columbia University School of Library Service.

**Summary**:

In the United States, there are few, if any, university-sponsored courses in indexing given outside the curricula of the 60 to 70 accredited and unaccredited schools of library science, schools of library service, schools of library and information science, and schools of information science.

In general, the courses that are given are, from the viewpoint of the majority of the Society members, either too broad, in that they deal primarily with general information handling and systems analysis; or too narrow, in that they deal primarily with machine indexing systems or specific manual systems. There is little emphasis on back-of-the-book indexing or journal indexing. Many of the courses combine training in indexing with the teaching of abstracting.

The courses are usually elective courses with small enrolments. Many of the students in the indexing courses are not candidates for degrees, but are either already librarians, or are non-librarians who want training in indexing for use in specific working situa-
tions. The courses are usually not given every semester and are often taught by an outside lecturer, not by a regular member of the school faculty.

The students emerge from these courses with some of the background necessary to become professional indexers. What they need in addition to these courses, is actual, practical, on-the-job experience as indexers. There are, indeed, many fine and effective professional indexers who have never taken a formal course in the subject.

The distinction must be made between (1) the training of indexers in working situations, and (2) education in indexing principles and practices. The relation of these to the kinds of tasks that make up the indexing process should also be stressed.

Indexing actually has three levels. The least specialized is the clerical level. This will not be discussed here.

The next level is the sub-professional level. This requires an intelligent person, on-the-job training, and some supervision. Tasks on this level include choosing subjects and index entries for texts in accordance with a previously established index design, index structure, and even, perhaps, a list of acceptable index entries.

On the professional level, the professional indexer must be able to design and plan indexes and to train others in the use of these designs to produce actual indexes. Professional indexers need on-the-job training, but they also need knowledge of indexing principles, theories, and techniques. These are the people that university-sponsored indexing courses should be aimed at.

**Afternoon Session**

**Topic:** What Should Indexers Expect from Publishers? What should Publishers Expect from Indexers?

**Moderator:** Anne J. Richter, former Editor-in-Chief, Book Department, R. R. Bowker Company.

**Panellist:** Dee Atkinson, freelance indexer.

**Summary:**

What should free-lance indexers expect from publishers?

First—more indexes. This would mean more sales for publishers as well as more work for indexers, and the only books to be published without indexes might be ephemeral fiction. Children's non-fiction is an outstanding area of neglect.

Scheduling of assignments should be done for the benefit of both free-lancer and publisher. Printers' lost time should not be recouped by rushing the indexer. Conversely, the indexer should bear in mind the economics of getting books out on time.

A back-of-the-book index must almost always be done in a hurry. As we all know, the index if done properly (from page proof) is usually the last part of the book to be finished. In spite of this built-in pressure, a little leeway in scheduling makes for better indexes (and less editing time in the house).

Specific advance information on number of pages, method of delivery, and space allotted is extremely helpful. Also, if there is a particular style that the publisher prefers, this should be given to the indexer in advance—preferably in writing. If space is really tight, the indexer should be told how many lines the index should take, and how many characters there should be to a line. Calculating this is normally the function of the designer, not the indexer. And since thinking time is just as valuable as writing time or reading time, brevity should never be equated with economy.

Indexers should be allowed a great deal of autonomy. Working under the direction of an author or trying to patch up an author-produced index can lead to bad indexes and poor publisher-indexer relations.

The indexer, as a creative worker, should be paid a fair price for his work, on a separate scale from that of other free-lance workers.

Perhaps, most importantly, the indexer expects to be treated as a human being, and
this includes not only mutual respect, trust, and fair dealing, but recognition for his creative effort: a byline, a mention in the acknowledgements or—particularly—copies of reviews. All these things make for more professional job satisfaction and greater financial success for all (including the author!)..

Panellist 2: Rose Bernal, Director of Indexing, Crowell Collier Education Corporation, Crowell Collier and Macmillan, Inc.

Summary:

Encyclopaedia indexing requires a staff of indexers who work under the supervision of a director of indexing. The director must design and structure the index, hire and fire the people who do the indexing, plan time schedules with printers and editors, oversee work methods and procedures, establish and maintain consistent indexing patterns, supervise the editing and formatting of the finished index, and in general participate actively in every part of the indexing process.

What does a director of indexing expect from the indexer(s) he or she hires? The indexer should have a broad, liberal education with a fairly deep knowledge of one subject area; he must be willing to undergo a two or three-month training period in the methods and procedure used in the particular indexing situation; he must be willing to do his share of the drudgery, such as typing cards and alphabetization; he should be flexible and task oriented; and he should be willing and able to offer creative suggestions as well as to follow the suggestions of others.

What should the indexer expect from the director of indexing? He should expect to be provided with access to reference tools, lists of standard terms, editorial assistance, stationery supplies and other needed equipment; he should be allowed to work at his own pace and in his own way, as long as he produces a reasonable amount of work; he should have good working conditions and an appropriate salary; he should be treated fairly and objectively, be listened to when he advances new ideas, and be assigned to no more than his fair share of drudgery.

The director of indexing and the indexers should work together towards the goal of a simple to use, consistent, comprehensive index that will provide quick and easy access to the information in the encyclopaedia and be easy to revise when a new edition of the encyclopaedia appears.

Panellist 3: John Mulvihill, Assistant to the Manager, Central Abstracting and Indexing Service, American Petroleum Institute.

Summary:

The Central Abstracting and Indexing Service of the American Petroleum Institute indexes abstracts of materials of interest to the petroleum industry. Since 1964, it has published a printed monthly subject index that contains approximately five index entries for each abstract. It also publishes an index in dual dictionary format in which the abstract number of every abstract assigned to a given index term is listed under the term, thus providing the user with the ability to conduct a manual search using coordinate indexing procedures. In the dual dictionary format, there are approximately forty index entries per abstract. An index on magnetic tape and magnetic disc are also provided for computer searching.

All of these indexes are produced in a single indexing operation. The indexer reads an abstract and assigns index terms to it, using only the authorized terms listed in a thesaurus. The thesaurus presently contains approximately 4,500 authorized terms. It also contains a hierarchal display of the terms and many cross-references.

The indexers are told to index every concept they perceive in an abstract. If there is no authorized term that exactly characterizes a particular concept, they are told to choose the closest term and also to record separately a term (called an identifier) that does characterize the concept accurately. An index of the identifiers assigned to abstracts
is published in each monthly index in a separate alphabetical listing. Once a year these are examined and if a particular identifier has been used fairly regularly, it is added to the thesaurus and becomes an authorized term. A new thesaurus is published annually.

An indexer is told to use the most specific term he can in characterizing a concept. The computer automatically adds broader or related terms when the index is processed. The indexer also designates which terms he feels are of most importance for the abstract. These are the terms used in the monthly index. The other terms the indexer has assigned appear only in the dual dictionary, tape, and disc indexes.

Indexers who work for the American Petroleum Institute Central Abstracting and Indexing Service are full-time indexers with subject expertise in chemistry or engineering. They index five days a week. They undergo a comparatively short period of training, but their indexing is always edited by supervisors.

Availability of a full record of the proceedings

A tape recording of the complete morning and afternoon program sessions including the question and answer periods at the end of each session is available. The recording runs more than three and a half hours and is available either in tape cassette or tape reel form from: Mrs. Barbara M. Preschel, Vice-President and Program Chairman, American Society of Indexers, 400 East 56 Street, New York, New York 10022, U.S.A.

The price for the recording is $7.50. The cheque should be made out to the American Society of Indexers.

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Canadian Index Committee

The newsletters* of the Index Committee of the Bibliographical Society of Canada are published quarterly and for the first time information is available on developments in indexing in Canada.

Newsletter no. 2 (January 1971), contains an article on ‘Bibliographical indexing’, dealing mainly with the historical background to periodical indexing and the problems faced by the specialized subject researcher. The newsletter also contains a useful list of recent articles on indexing taken from British and North American journals.

Newsletter no. 3 (April 1971) prints the report of the first Executive meeting of the Index Committee, held on 20th March 1971 in Toronto, where it was resolved that the Committee should concern itself primarily with the promotion of indexing and the training of indexers, rather than undertake major indexing projects itself. Guide lines for future activities were agreed upon, including the compilation of a Union List of Indexes and a Directory of Indexers. An index training workshop pilot project is being set up in co-operation with the School of Library Science at the University of Toronto.

A questionnaire-survey on local indexing in Canada, reported in Newsletter no. 3, was sent out to over 350 libraries at the beginning of March 1971. An interim statement revealed that within a month 75 questionnaires out of a possible 369 were returned from the ten provinces, with over half stating that no indexing at all was carried out.

E.J.W.

* The Newsletters have been placed in the Society's Library.