Problems, some usual (marking Book Indexing Postal Tutorials)

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Discusses some of the difficulties of beginning indexers as evidenced by their work on set passages, and how some of the basic principles of indexing may be taught.

Book Indexing Postal Tutorials (BIPT) is a correspondence course in back-of-the-book indexing. It is a practical programme of study and involves the creation of mini-indexes to short texts. These were designed to present a selection of the more usual problems that an indexer is likely to meet. The five tutorials enable students to practise on small and manageable texts, which become progressively more complicated. After the first two tutorials the texts are divided into clear chapters and resemble little books.

Each of the first two tutorials includes a similar text together with a sample index, as a guide for the student. When their tutorial is marked they are provided with a 'model' index. It is made clear to them that this is not the only way in which to index the text, and that the tutor does not claim to have produced the definitive index. I try to avoid being dogmatic and make it clear that, except where obvious errors have been made, my comments are mainly suggestions based on making the index more accessible to the user.

In one of the tutorials an entry evolution is required. I have marked hundreds of versions of this entry and there have never been two the same. I have redone it myself several times. This is an excellent example of the essential subjectivity of indexing. Not only do different people do perfectly acceptable different versions of an entry, but the same person at different times can also produce alternative examples.

The marking procedure is detailed and tailored to each student’s needs. Each marking task throws up a different selection of problems, from garbled and peculiar entries that one could never imagine anyone looking up, to mild infelicities of phrasing. Notes are written on all these. Useful entries are commended, even if they do not appear in the ‘model’ version.

Over the years the same problems have cropped up frequently. The printed notes supplied with each ‘model’ cover a lot of these. Most of them, like not italicising or underlining “see also”, capitalising every entry or awkward indents are easily remedied and students quickly master most of them.

Some students find other problems harder to overcome. The most significant of these I call:

- consistency
- umbrellas
- embedding
- double-entering, and
- the woods and trees syndrome.

They are all part of my constant theme of accessibility and user-friendliness, which, together with accuracy, should be the main aims of an indexer. What follows has nothing to do with rules and regulations. The comments I make to students are based on my own indexing practice and are only suggestions.

**consistency**

This applies to consistency in spelling, punctuation, use of verbs, arrangement of sub-entries etc — in fact just what you would expect in a good index.

In the third tutorial students may make sub-entries for various kinds of fauna in a particular country. Sometimes they choose to use the Latin names (or more commonly and more usefully for the ‘average’ reader) the English ones. The inconsistent indexer will mix these, sometimes in a peculiar way. An example could be:

United States
bugs 243-4
Cimex 245-6
cockroaches 233, 235
Forficula auricularia 264-5
lice 249, 258-9
Panstrongylus megistus 240
Pediculus humanus 251-8
spiders 249

A somewhat more useful entry is suggested, where the pages for the Latin names are subsumed under the English versions:

United States
bugs 240, 243-4, 245-6
cockroaches 233, 235
Forficula auricularia 264-5
lice 249, 251-9
spiders 249

**umbrellas**

Some students have difficulties pulling related entries together into a useful and coherent main entry that includes (or cross-refers to) all relevant references. This problem tends to emerge in the second tutorial, which is a short geographical text.

Failure to consolidate could manifest itself as having an entry for fruit including the pages where the actual word fruit is used, but not those pages where specific fruits (eg oranges) are named.

Although this is a very common error at the beginning most students improve steadily. I tell them that I think that this is one
of the most significant and important services that the indexer can perform for the user of the index.

This was brought home to me very forcibly recently in a book about pregnancy which someone had occasion to consult when she had a headache. There were only three minor references, and so she believed that she had no need to worry. It was only by chance that she later found two pages devoted to major problems of pregnancy, which included the various reasons for headaches. None of these important topics were included in the index. The headache didn’t seem quite so minor after all!

To illustrate what I mean by ‘umbrellas’ I list an example set of entries from an imaginary index:

Aborigines 97-8, 127-8
Australia 96
mining 96, 100
New South Wales 44, 128
Northern Territories, agriculture in 42, 101
Queensland 97, 128
mining 41, 96
Victoria 45

These entries are misleading as a reader looking up Australia will only find page 96. If they imagine pulling all these references together into one (eliminating the states if space is limited, which it usually is!) they would end up with an entry like this:

Australia 41, 42, 44, 45, 96-8, 100, 101, 127-8

As this would be over the limit for a ‘string’ the indexer would have to look at the text again and devise useful sub-entries. The end-result could be something like this:

Australia
Aborigines 97-8, 127-8
agriculture 42, 96, 98
industry 45, 97
manufacturing 101, 127
mining 41, 96, 100
transport 42, 100

An interesting point about the above example is that it demonstrates also a feature that many beginners do not realise — that you can have the same page in more than one sub-entry. Whenever students create useful ‘umbrellas’ like this I say that they should also enter any of the sub-entries as main entries wherever necessary (for example, agriculture). This is linked to embedding and double-entering.

double-entering

I link this to my suggestion that indexes should be tackled, where possible, in ‘one fell swoop’, pointing out that for me even a day away from a particular text will result in parts of it disappearing from the forefront of my mind so that I cannot necessarily remember all the topics and the decisions that I’ve made.

I suggest that one of the last checks that is necessary is the double-entry check, usually done on the penultimate printout. That is checking that page numbers are identical for topics entered more than once. I give a simple example of:

Africa, agriculture in 88-9
agriculture in Africa 88-9

where a later reference might be included under only one of these entries:

Africa, agriculture in 88-9, 103
agriculture in Africa 88-9

and I indicate with further examples the compounded problems when the pages are entered under further headings.

Allied to this I mention the importance of checking cross-references as it’s easy to decide to change group to groups and forget to change the cross-references as well. Although the sophisticated computer programs (and in particular the ‘grouping’ facility) that so many of us use make these tasks very quick and straightforward, students have to be made aware of the need to do these sorts of checks.

woods and trees syndrome (also called the skeleton)

This is a problem which crops up at the beginning but is particularly significant in the fourth tutorial. I encourage students to enter the main topics of a text, as well as the details.

In my opinion too many indexes are lacking what I call a skeleton, which can also be compared to a clear and straightforward ‘map’ of major locations. Such indexes are full of trees (the details) but lack woods (the main subjects). The details may be well indexed, with entries like comprehensive schools, primary schools, classroom techniques and examinations but there may be no entry for either education or schools.

To illustrate I ask them to imagine a short book of five chapters entitled WIDGETS. These chapters are about manufacture, advertising, finance, sales and uses of these invaluable objects.

I suggest that they imagine taking each chapter and making ‘skeleton’ notes based on the chapter title and any subheadings. Thus the notes for the chapter on manufacture could be:

manufacture of widgets 1-45
distribution networks 12-23
factory location 1-8
legislation 16-17
power sources 9-12, 26-38

Then I describe the creation of all the necessary double-entries and cross-references that could also be main entries, for example:

distribution networks 12-23
legislation on widget manufacture 16-17
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I point out that many indexes do not have a ‘skeleton’ as their indexers have considered it unnecessary due to the presence of a contents page; and that in some cases these indexers forget the users, being themselves so aware of the ‘woods’ that they consider that it’s only necessary to include the ‘trees’.

Coming from the ‘put it all in the index’ camp — that is that no user should be expected to have to search through the contents page — I also create what I call a general reference entry. This directs the user to the major topics in the index. Thus for the above example there would be an entry:

widgets see advertising; finance; manufacture; sales; uses

Apart from being useful for the user, the creation of a ‘skeleton’ helps indexers who then have a framework for their index and a very good idea of the content of the book before they settle down to reading it in detail.

... and the rest

As I teach indexing from the standpoint of a frustrated user of many inadequate indexes, my suggestions are always geared towards the theme of ‘user-friendliness’ but I make it clear not only that these are not rules but that I also am constantly changing my own style. This is due not only to the passage of time as we all improve (or at least change) with experience but also to the different types of books and the specific requests of editors and authors.

There are many, many other problems which students encounter. The ‘model’ index to the fourth tutorial, for instance, has 38 numbered notes, covering a variety of minor points, many of them reiterations of previous comments. The following is an example:

34. tooth. It’s a bit excessive to enter this as well as ‘teeth’. Words with plurals that will not necessarily alphabetise together (like mouse and mice etc) sometimes need to be double-entered or cross-referred. I’ve left it in as an example of how an indexer has to try to get into the mind of the readers. There is no guarantee that they are going to think in the same way as you. Whenever you have space provide synonyms or singulars/ plurals if you think they are necessary.

That final example illustrates my style of marking the BIPT tutorials and the sort of minor problems that students encounter.

As I continue to read new versions of these little indexes, other errors or awkwardnesses indicate new teaching points. Marking becomes a process of growth in indexing skills for both the students and myself. By the last tutorial many people have developed styles that, although they may be rather different from mine, are perfectly valid.

INDEXING TUITION
BOOK INDEXING
POSTAL TUTORIALS
(BIPT)

BIPT is a practical course, with one-to-one tuition and detailed individual marking. It consists of five tutorials, involving the compilation of indexes to short texts, chosen to represent most of the problems an indexer is likely to meet. A sixth optional tutorial is the creation of an index to a complete book. Over 600 people have enrolled since BIPT began in 1983 and many are now successful full-time indexers. The course is run by a Registered Indexer with 27 years of experience and over 1200 published indexes.

The first tutorial with booklets costs £55. If you decide to continue, the remaining four tutorials cost £140. There is nothing else to pay and there are no textbooks to buy. There is a small extra charge for postage abroad.

Residential mini-courses can be arranged to suit individual requirements. These include the first two or three BIPT tutorials with detailed personal tuition; an introduction to both MACREX and/or CINDEX; and advice on getting work, dealing with income tax, charging etc. Accommodation is in The Lodge which is a guest house. Shorter courses can be arranged for those who are already indexers but who need help with computer indexing. The cost depends on the amount of tuition required.

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