
Indexing training

Glenda Browne*

Indexing is an important skill for many people working in the information industry, including editors, information architects, and librarians. In addition, indexing is a specialised profession in its own right. However, indexing training is not always easy to find.

Australians who want to learn about indexing have three main options:

- wait for a short course to be run by the Australian and New Zealand Society of Indexers (ANZSI) or another society (eg a society of editors or technical writers);
- sign up for a distance education course from the United Kingdom or the United States; or
- do an editing or library and information science (LIS) course that has an indexing component.

All of these are good options and so the choice will depend on when the student wishes to do the course, how much they are willing to pay, whether they also want to learn related subjects, and how happy they are studying alone.

The best way to keep up-to-date with the range of indexing courses is to look at the ANZSI website: <http://www.aussi.org> (to be changed to <http://www.anzsi.org>). Some computer courses may cover structural aspects of database indexing and search engines, and records management courses cover indexing of records, but they have not been examined here. Neither does this article examine thesaurus construction specifically, although it is taught in courses run by ANZSI and LIS schools.

The most thorough study of indexing education and training in Australia was done by the ACT Region branch of AusSI (now ANZSI), and was summarised in a draft unpublished report, which I have used as a source of ideas for this article.¹ One of their comments, which holds true today, was: "Responses indicated that education and training in indexing as a separate topic was not widely offered and had gaps in coverage. Short courses were generally sporadic or once-off." Not only that, a number of institutions listed as offering indexing courses in 1998 (eg University of New South Wales) now no longer offer any library science courses! This report also noted problems with the definition of indexing, which covers book, periodical and database indexing, as well as newer fields such as website indexing and website and intranet metadata.

One notable feature from the report is that of respondents to an email survey sent to Index-L and aliaIndexers 27 were self-taught, 27 had done a course (university, correspondence or short) and 12 had learnt through on the job training, apprenticeship or mentorship. If these proportions are true of the indexing community as a whole, it suggests there are a significant number of indexers who have done no formal or informal training with another indexer.

The only "certification" of indexers in Australia is with ANZSI registration through submission of an indexed book (<http://www.aussi.org/profissues/registration/registration.htm>, will soon move to <http://www.anzsi.org>). There is, as yet, no formal recognition for completion of any course, although many clients will take course completion into account. There is also no registration process through ANZSI for database indexers.

WHAT SHOULD BE INCLUDED IN COURSES?

Course content will depend on the general focus (eg book versus database indexing), the time available, and the importance of either theoretical or practical elements.

Short courses run by societies tend to be very practical, and participants are often those considering indexing as a career or at least a part-time occupation. A study of indexing as a component

* Glenda Browne is an indexer, writer and teacher. With Jonathan Jermy she has written *Website Indexing* (Auslib Press, 2nd ed, 2004) and *The Indexing Companion* (CUP 2007). She has taught indexing at UNSW, Macquarie University, Macleay College, and for ANZSI and the NSW Society of Editors. Thanks to Ana Govan, Gillian Hallam, Philip Hider, Bonna Jones, Mike Middleton, Sue Myburgh, and Christine Richardson for their input.

¹ Holden K, Hoogland T and MacDougall S, *Education and training in indexing for Australians: a project of the Australian Society of Indexers* (unpublished, 1998) ANZSI ACT Region Branch.

of a university qualification is likely to include more theory. This is because universities attempt to provide a broad education rather than specific job training, and also the indexing skills they teach are likely to be applied in a range of different contexts, making the broad principles as important as the specific details. The focus in an editing course is likely to be on book indexing (although as editors now often work in electronic media it is appropriate to also include broader coverage, as the Macquarie University course has done). The focus in a LIS course will tend towards database indexing (and cataloguing, which is indexing in a very broad sense), but may also include book, periodical and website indexing.

For an ASI survey in 1977, instructors described courses in respect of 20 topics and ASI members evaluated the importance of these topics to them as working indexers. The course content did not always coincide with topics indexers thought were of practical importance.²

The April 2002 issue of *The Indexer* focused on education in indexing, in which James D Anderson presented 20 fundamental attributes of all information retrieval databases and systems.³ These included: subject and documentary scope, documentary units, indexable matter, analysis, exhaustivity, specificity, display, syntax, vocabulary management, locators, surrogate displays, size, search interface, and record structure. In his courses students can select the type of information retrieval tool they work on (eg book, database, website) but must apply the basic indexing principles to their project.

SOCIETY-RUN COURSES

ANZSI courses are held on an ad hoc basis, according to demand and availability of trainers and organisers, and are run by branches in New South Wales, Victoria, the ACT Region and New Zealand. Most of the courses are in basic book indexing but from time to time courses are offered in indexing software, website indexing, periodical indexing, annual report indexing, legal indexing, thesaurus/taxonomy construction and other topics according to demand. Details are advertised in the ANZSI Newsletter, on mailing lists and sometimes in periodicals, such as *inCite*. People should contact their local ANZSI representative (<http://www.aussi.org/administration/contacts.htm>) if they are interested in doing a course so they can go on a list for notification when courses are run.

Indexing courses are also occasionally run by editing (see <http://www.iped-editors.org>), publishing and technical writing societies. These tend to be one-day courses that give an overview for non-indexers who need a general understanding of the process. Caval Collaborative Solutions (<http://www.caval.edu.au>) has also run courses in Australia and overseas. ANZSI also runs a mentoring program, in which students receive individual feedback on a special project they are working on. (Details are on the ANZSI website.)

DISTANCE COURSES

Distance education in indexing is available through courses based in the United Kingdom and the United States.

Society of Indexers (SI, UK) indexing training course on CD was written and is administered by the Society of Indexers (UK). Units, tutorial support and formal tests are all available separately so that individuals can learn in their own way and at their own pace. (Details at <http://www.indexers.org.uk/index.php?id=140>.)

USDA Graduate School – Basic Indexing and Applied Indexing self study courses were developed and are taught by professional indexers, and allow students to progress at their own speed, working at home. (Details at <http://www.grad.usda.gov>.)

University of California Berkeley – Indexing: Theory and Application distance learning course was designed for those interested in becoming freelance indexers for publishers, business corporations and technical companies. (Details at <http://www.unex.berkeley.edu/cat/course394.html>.)

² Anderson JD, "Indexer education – ASI survey" (1977) 10 (No 3) *The Indexer* 131 (available online at http://www.indexers.org.uk/Slauto/IA/TI_IndexerContents.php?vol=10&iss=3).

³ Anderson JD, "Indexing, teaching of, See: Information retrieval design" (2002) 23 (No 1) *The Indexer* 2 (available online at http://www.indexers.org.uk/Slauto/IA/TI_IndexerContents.php?vol=23&iss=1).

Information about other courses is available at the American Society of Indexers website (<http://www.asindexing.org/site/courses.shtml>). Comments about these courses can be found by searching the archives of the Index-L discussion group (<http://www.indexpup.com/index-list>). Look for recent messages, as the courses have apparently changed over the years, especially with regard to timeliness of responses.

INDEXING AS PART OF ANOTHER COURSE

Editing courses

Indexing is a component of editing courses such as:

- Macquarie University postgraduate program in Editing and Publishing (<http://www.ling.mq.edu.au/postgraduate/coursework/pep.htm>);
- Macleay College Book Editing and Publishing Diploma (<http://www.macleay.edu.au/book.html>); and
- Whitireia Polytechnic's Diploma in Publishing in New Zealand, includes six hours of indexing (http://www.whitireia.ac.nz/programme_selector.php?key=26&career_id=Editor).

It can be difficult identifying courses with an indexing component, as indexing is rarely mentioned prominently in the course descriptions. It is also important to check that course components haven't changed.

Library and information science courses

Indexing, especially open system (database) indexing using controlled vocabularies, is a component of many undergraduate and postgraduate library and information science courses, although the content and approach varies significantly. Details of ALIA-recognised LIS courses are at <http://www.alia.org.au/education/courses/librarianship.html>, and links to related courses are at <http://www.alia.org.au/education>.

Indexing is taught in a number of subjects at Charles Sturt University (CSU). The subject INF116/INF425 (Describing and Analysing Information Resources) looks at the description and analysis of information resources, using metadata standards to illustrate the basic principles which underlie effective information organisation practice, especially for electronic resources. The subject INF216/INF411 (Organising Information, to become Application of Bibliographic Standards) covers the principles of cataloguing, classification and subject indexing for a wide range of information resources using thesauri and descriptive cataloguing rules. In INF314/INF511 (Advanced Information Retrieval) students do a practical indexing exercise using *Family Thesaurus* to index journal articles.

Students have assignments on periodical indexing and web page indexing at Curtin University. Metadata creation is taught at the Queensland University of Technology (QUT) in the Information Organisation subject, which focuses on the varieties of metadata that can be used to describe and structure databases. One exercise has been modified to enable students to enter a "folksonomy" and to use tagging for comparison of uncontrolled vocabularies. The subject Knowledge Representation (LIBR 5023 (13695)) at the University of South Australia (UNISA) includes a range of topics, such as knowledge representation, thesaurus construction, analysis of indexing and retrieval systems, and manual and computer indexing and abstracting. Students have lectures in automated indexing at CSU, QUT and Curtin University.

Other LIS courses teach the broad principles of indexing in general terms, perhaps scattered across many units, and although students may not create indexes they are getting a grounding that will help them if they later turn to indexing. In some courses indexing is presented as a career opportunity for librarians, although not all educators consider that there is much future for professional indexers, given the use of software in this area.

FUTURE OF INDEXING

Now that so much information retrieval depends on search engines and unstructured, un-indexed data, is there any future for indexing? Indexers have been pondering this question for years, and there is generally a confident feeling at the moment, although some specific areas of indexing are in serious decline.

Bibliographic database indexing is most challenged, because the granularity of the indexing, with terms applied to whole articles, which are often well-structured and well-labelled, make automated or machine-aided indexing (automated with human oversight) feasible. Nonetheless, many indexers of such databases report that the automated indexing needs lots of correction, and that there is never enough time to train the systems to do better. At the same time, many government and corporate intranet projects are employing human indexers, balancing some of the losses.

The employment gains, however, may be in the field of information architecture rather than indexing or librarianship. There has been convergence in the work many professionals do, and it is possible that even if the work continues some individuals may be missing out.

As well as losing work to computers and other professional groups, indexing work is now being outsourced to English-speaking countries with lower wages than Australia, especially India and the Philippines. At this stage the losses from Australia seem to be limited to big projects such as legal indexing, but in North America and the United Kingdom it seems as if smaller projects such as book indexes are also being outsourced. Occasionally the work is offered back to the United Kingdom and the United States by the project managers (often Indian), but at a lower rate than would be obtained in the home country.

Despite the doom and gloom, many indexers are as busy as ever. Book indexing continues strongly, website and intranet metadata and indexing are a newish field, and there are even retrospective indexing projects making up for a lack of indexing in the past. Amazon, Google Book Search and MSN Book Search all display the contents of indexes to potential buyers and borrowers of books, so in some ways the web has made book indexes more prominent.

There is a Basuto proverb that says, "No-one may know how the rooster will crow while it is still in the egg". The future of the "indexing egg" hasn't yet hatched, so we can't be quite sure what the future holds. We can only position ourselves as well as possible to take on the opportunities that remain, as well as new ones that arise.