

The Indexing Companion

Indexing is a crucial activity, but it is inconspicuous. Indexes are systematic guides that help people find information in a document, or documents in a collection. Although most people use them frequently, hardly anyone thinks of the creative activity that went into their making.

The Indexing Companion has something for all information professionals. It covers the basic principles of indexing, examines controversial areas and speculates on future directions. Based on publishing standards, textbooks, and the consensus of the indexing community, the book is packed with practical information. It describes the people involved in indexing; the processes, tools and software; and the special requirements of particular formats and subjects. It explores new challenges in indexing, such as working with indexes created by computers, and dips into emerging topics such as folksonomies and the semantic web.

Far from being dry, indexing is challenging and rewarding work. *The Indexing Companion* gives an overview of indexing for professional indexers, editors, authors, librarians, and anyone who may be called upon to write, contribute to, edit or commission an index.

Glenda Browne and **Jon Jermey** are freelance indexers with extensive experience in teaching and indexing.

Cambridge University Press
978-0-521-68988-5 - The Indexing Companion
Glenda Browne and Jon Jermey
Frontmatter
[More information](#)

The Indexing Companion



G L E N D A B R O W N E
J O N J E R M E Y



Cambridge University Press
 978-0-521-68988-5 - The Indexing Companion
 Glenda Browne and Jon Jermey
 Frontmatter
[More information](#)

CAMBRIDGE UNIVERSITY PRESS

Cambridge, New York, Melbourne, Madrid, Cape Town, Singapore, São Paulo

Cambridge University Press
 477 Williamstown Road, Port Melbourne, VIC 3207, Australia

Published in the United States of America by Cambridge University Press, New York

www.cambridge.org
 Information on this title: www.cambridge.org/9780521689885

© Glenda Browne, Jon Jermey 2007

First published 2007

Printed in Australia by Ligare

A catalogue record for this publication is available from the British Library.

National Library of Australia Cataloguing in Publication data

Browne, Glenda.
 The Indexing Companion.
 Bibliography.
 Includes index.

ISBN-13: 978-0-52168-988-5 paperback

ISBN-10: 0-52168-988-0 paperback

1. Indexing. 2. Information organization. II. Title.

025.3

ISBN-13: 978-0-52168-988-5

ISBN-10: 0-52168-988-0

Reproduction and communication for educational purposes

The Australian *Copyright Act 1968* (the Act) allows a maximum of one chapter or 10% of the pages of this work, whichever is the greater, to be reproduced and/or communicated by any educational institution for its educational purposes provided that the educational institution (or the body that administers it) has given a remuneration notice to Copyright Agency Limited (CAL) under the Act.

For details of the CAL licence for educational institutions contact:

Copyright Agency Limited
 Level 15, 233 Castlereagh Street
 Sydney NSW 2000
 Telephone: (02) 9394 7600
 Facsimile: (02) 9394 7601
 E-mail: info@copyright.com.au

Reproduction and communication for other purposes

Except as permitted under the Act (for example a fair dealing for the purposes of study, research, criticism or review) no part of this publication may be reproduced, stored in a retrieval system, communicated or transmitted in any form or by any means without prior written permission. All inquiries should be made to the publisher at the address above.

Cambridge University Press has no responsibility for the persistence or accuracy of URLs for external or third-party internet websites referred to in this publication and does not guarantee that any content on such websites is, or will remain, accurate or appropriate.

Cover images: (top) © Nicola Gavin/Shutterstock.com, (middle left) © Jaime Duplass/Shutterstock.com, (middle right) © Martin Garnham/Shutterstock.com, (bottom) © Sean Nel/Shutterstock.com, Platypus: © Lauren Statham, Alice Graphics.



Contents

| | |
|---------------------------------------------|----------------|
| Foreword | <i>page</i> ix |
| Preface | xi |
| 1 The Indexing Work Environment | 1 |
| Indexers | 2 |
| Writers | 12 |
| Editors | 15 |
| Index users | 18 |
| 2 Definitions and Standards | 26 |
| Definitions | 26 |
| Standards | 31 |
| 3 Planning Indexes | 37 |
| Book-style indexing | 37 |
| Collection indexing | 47 |
| 4 Concepts, Topics and Names | 53 |
| Concept analysis | 53 |
| Wording of topics and names | 57 |
| Topical headings | 57 |
| Name headings | 61 |
| Errors and missing information | 65 |
| The malignant, mighty or maligned metatopic | 65 |
| Classification in indexes | 67 |
| 5 Selecting Terms | 69 |
| Book-style indexes | 69 |
| Collection indexes | 72 |

Contents

| | | |
|----------|------------------------------------------------------------------|------------|
| 6 | Controlled Vocabularies for Selecting Terms | 79 |
| | Name authority files | 79 |
| | Thesauruses | 80 |
| | Taxonomies | 83 |
| | Ontologies | 84 |
| | Topic maps | 85 |
| | Data dictionaries | 85 |
| 7 | Structuring Indexes | 87 |
| | Non-displayed index search design | 87 |
| | Notes in indexes | 88 |
| | Subheadings | 89 |
| | Cross-references and double entry | 96 |
| | Locators | 99 |
| | Filing rules | 104 |
| | Delivery of indexes to clients | 110 |
| | Typography and index design | 111 |
| 8 | Quality Control and Interoperability | 113 |
| | Evaluation | 113 |
| | Consistency | 115 |
| | Interoperability | 117 |
| | Markup languages | 119 |
| | Embedded indexing | 124 |
| 9 | Specialised Source Material: Formats, Subjects and Genres | 128 |
| | Annual reports | 129 |
| | Bibliographies | 129 |
| | Biographies | 129 |
| | CD-ROMs and DVDs | 130 |
| | Citations | 131 |
| | Correspondence and diaries | 131 |
| | Custom-built publications | 132 |
| | Data warehouses | 133 |
| | Digital libraries | 133 |
| | E-books | 135 |
| | Encyclopedias and other multivolume works | 137 |
| | Fiction | 139 |
| | Genealogical and local history materials | 140 |
| | Geographic materials | 140 |
| | Handbooks and manuals | 141 |
| | Images | 142 |
| | Information architecture | 145 |

Contents

| | |
|-------------------------------------------------|------------|
| Intranets and CMSs | 145 |
| Journals and magazines | 147 |
| Knowledge management | 148 |
| Legal publications | 149 |
| Library collections | 150 |
| Looseleaf services | 153 |
| Multimedia (audiovisual) materials | 153 |
| Museum collections | 155 |
| Newspapers | 156 |
| Online help | 157 |
| Records and archives | 159 |
| Scholarly books | 162 |
| Scientific and medical publications | 162 |
| Software repositories | 164 |
| Sound and music | 165 |
| Textbooks | 166 |
| Video | 167 |
| Web as a whole | 168 |
| Web documents | 170 |
| Websites | 171 |
| World as a whole | 173 |
| 10 Software and Hardware | 175 |
| Dedicated indexing software | 176 |
| Microsoft Access™ | 178 |
| Microsoft Excel™ | 182 |
| Embedded indexing software | 183 |
| PDF indexing | 186 |
| ‘Automated indexing’ applications | 187 |
| Book-style website indexing software | 188 |
| Thesaurus management software | 190 |
| Taxonomy management software | 191 |
| Non-indexing software | 191 |
| Hardware | 193 |
| Health and safety | 193 |
| 11 Threats and Opportunities in Indexing | 195 |
| Hopeless future | 196 |
| Hopeful future | 199 |
| Conclusion | 204 |
| References | 205 |
| Appendix: Selected websites | 218 |
| Index | 228 |



Foreword

Information is useful. Accessible information is valuable. But easy access to pertinent information is crucial to success in modern life. Indexers provide this access, by identifying and ordering important aspects of the information we deal with.

In order to do our work properly, indexers must understand both the theory and practice of indexing. We are fortunate to have a number of publications worldwide that assist us in learning and applying indexing skills.

The Indexing Companion is the most recent addition, and the first Australian contribution, to the growing number of publications on indexing. In it, Glenda Browne and Jonathan Jermey contribute to the corpus of indexing in a number of significant ways: through their focus on interoperability, not only between the diverse strands of indexing but also among the various information professionals who create and use indexes; through their placement of 'traditional' indexing within the broader context of the information industry (including describing what other information professionals do and how indexing is incorporated into museum, library and archive activities); and through their treatment of the entire spectrum of indexing, from traditional back-of-book 'closed system' indexing to 'open system' journal cumulation, website and database indexing.

Browne and Jermey acknowledge that indexing is an international profession with much common ground but some regional differences, and explain the various standards and guides used in different countries and by different publishers. Their global perspective makes this text applicable to indexers in many countries, as well as being ideal for those working in Australia for either local or international clients.

The Indexing Companion draws its examples from every major indexing country, and it is a particular pleasure to see Australian indexing highlighted. Although Antipodean publishing is relatively small on the global scale, the Australian and New Zealand Society of Indexers is very active, due in no small part to members of the calibre of Glenda Browne and Jonathan Jermey. This, their latest collaboration,

Cambridge University Press
978-0-521-68988-5 - The Indexing Companion
Glenda Browne and Jon Jermey
Frontmatter
[More information](#)

Foreword

draws on their experience in indexing, librarianship, training and computing to present a work that will be a valuable resource for beginning and experienced indexers alike. I have no doubt it will improve the quality of indexing information available in Australia and elsewhere, and commend it to anyone with an interest in information organisation.

Lynn Farkas
President, Australian and New Zealand Society of Indexers, 2001–06



Preface

Indexing is a passion and a delight for those who are suited to it. For some people it is a full-time career; for others, including editors, writers and librarians, it is an occasional task. This book contains practical information about the process of indexing as well as specific techniques for a wide range of areas, and has something for all information professionals.

Those of us who index for a living are acutely aware of developments in the information industry. The authors have been indexing since 1988, and have observed significant changes in the work we do, the people we do it for, and the way we do it. Software developments have included tools that have aided us in our work (specialised indexing software, computers and the web); tools that may assist publishers but make indexers' lives more difficult (embedded indexing); and tools that threaten to take our work away (automatic indexing and search engines). This book is intended as a companion for indexers through times of change. We provide advice on working well, and we assess the future of indexing, identifying positives and negatives.

There has recently been an explosion in the use of indexing techniques in areas such as intranet and website search and navigation – often under different names, and done by different people. There is also significant and growing overlap in the work done by records managers, museum curators, librarians and indexers, although there is less communication between these groups than might be expected. Many of the tools and standards developed in one area have relevance in others, and software developments such as markup languages are having a wide impact. Along with convergence has come an understanding of the importance of interoperability (the ability of systems to exchange information), which is also a focus of this book.

The Indexing Companion covers the people involved in indexing, the processes and tools used in indexing, special formats and subjects that are indexed, the software used, and the future we can expect. The focus is primarily Australian,

Cambridge University Press
978-0-521-68988-5 - The Indexing Companion
Glenda Browne and Jon Jermey
Frontmatter
[More information](#)

Preface

but the issues are international and the references and examples are relevant to indexers worldwide. The book contains enough information to get you started on an indexing project. Anyone with an urgent need to start indexing should begin with Chapters 3, 4 and 7, which cover the core of the process. However, indexing skills develop over a lifetime, and you will need to supplement this book with face-to-face training, online training, wide reading, and participation in online discussions. The bibliography provides a range of resources for further exploration, including many that are freely available on the web.

Many thanks to those who helped us develop our first book, *Website indexing*, which is where we gained the skills and confidence to take on this project, and to all at Cambridge University Press, who have been enthusiastic about this project. We are grateful to our three anonymous publisher's readers, who made useful suggestions about structure and content that we incorporated into the book.

Thanks to colleagues within ANZSI and the international indexing community who have generously shared work and ideas, indexing practitioners who make their writings freely available on the web, knowledgeable contributors to online mailing lists such as Index-L, friends who listen to us enthuse about indexing, and to libraries which have supplied us with books and interlibrary loans. Many of the quotations in this book were found at www.quotationspage.com.

This book is dedicated with love to our families, especially Bill and Jenny.

Glenda Browne and Jon Jermey