American Society for Indexing

COMMITTEE REPORT

## Please return this report electronically no later than Tues., May 11, 2021.

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Name of Committee: New Training Course Committee Date: May 11, 2021

Name of Chair: Shana Milkie Email: smilkie@arborindexing.com

Name of Board Liaison: Email:

Other Committee Members (names and email addresses). Add second sheet if necessary.

 Rose Coad (rmcoad@earthlink.net); Anne Fifer (sa.fifer.graffito@runbox.com); Becky Hornyak (rhornyak@outlook.com); Linda Mamassian (editorialservices@gmail.com); Estalita Slivoskey (estalita.slivoskey@potomacindexing.com); Diana Witt (diana.witt@comcast.net); [Meghan Miller Brawley as she is available]

COMPREHENSIVE REPORT OF ACTIVITY SINCE: **February 1, 2021**

(Use as much space as desired.)

1. Continued creating lessons for Module 1. We are about 90% of the way done with Module 1.

2. Updated detailed outline for entire course (see attached). There will be four modules, with a recommended completion time of three months per module. This works out to a recommended time of one year for the course. If needed, students can request an extension for each module.

3. Uploaded completed lessons to date on Moodle.

4. Began working on lessons for Module 2.

5. Started discussing role and compensation of instructors. The committee will present a proposal on this item in the next couple of months. As a preview, the board should be aware that the committee would like to have instructors provide feedback on all lessons, in addition to feedback on the final exam. We would also like to make instructors available for questions from students during the course. Ideally, the same instructor would stay with the student through all four modules of the course. Current compensation to graders (which is a more limited role than we foresee for the new instructor role) is $310 for all four modules. This is already inadequate for the time involved. We anticipate proposing that instructors receive $500 for all four modules.

6. Continued online discussions via Groups.io list and continued meeting approximately every six weeks via Zoom.

REQUESTED BOARD ACTION:

1. Review attached course outline.

2. Begin discussing feasibility of increased instructor compensation, given that a proposal will be forthcoming.

New ASI Training Course

Course Outline – REV. 04/24/2021

**Module 1 – Introduction to Indexing: What Is an Index?; The Parts of an Index**

Objectives of Module 1

The student should be able to:

O.1. Define what an index is

O.2. Name the parts of an index

O.3. Understand the terminology of indexing

O.4. Name the types of documents and indexes

O.5. Identify indexable material

O.5.1. Describe the types of indexable material

O.5.2. Distinguish between indexable material and passing mentions

O.5.3. Distinguish between thematic relationships and classification

O.6. Follow index specifications and style guides

O.7. Try out student versions of software

O.8. Create a simple list of index entries to a short document

O.9. Format an index from a provided list of entries, following given specifications

Lesson 1: What Is an Index?

 1.1. definition of an index

 1.2. importance and functions of indexes

 1.3. needs of index users

 1.3.1. finding information; re-finding information

 1.3.2. audiences – lay, professional

Lesson 2: Parts of an Index

 2.0. anatomy of an index (figure)

 2.1. headnotes

 2.2. entries and entry arrays

 2.2.1. main headings

 2.2.2. subheadings, sub-subs, etc.

 2.2.2.2. webinar – “Successful Subheadings” with Fred Leise

2.2.3. locators

 2.2.4. cross-references

 2.3. metatopics and local metatopics

Lesson 3: Terminology of Indexing

Lesson 4: Types of Documents/Indexes

 4.1. trade books

 4.2. textbooks

 4.3. scholarly books

 4.4. encyclopedias

 4.5. journals

 4.6. websites

 4.7. databases

 4.8. embedded indexes

4.9. e-books

 4.10. discipline-specific documents (e.g., STEM, law, literary criticism, scripture)

Lesson 5: Indexable Material

 5.1. types of indexable material

 5.1.1. front matter

 5.1.2. text

 5.1.3. back matter

 5.2. indexable material versus passing mentions

 5.3. thematic relationships versus classification

Lesson 6: Index Specifications, Publisher Style Guides, Indexes in the Book Production Process

 6.1. alphabetical arrangement of indexes (word-by-word, letter-by-letter)

 6.2. subentry arrangement (alphabetical, page number, chronological, numerical)

 6.3. entry format (run-in, indented, combination, modifications for usability)

6.4. locator format (in full, compressed, footnotes & endnotes, figures & tables, bold & italic type, punctuation)

 6.5. cross-references format

 6.6. main heading capitalization

 6.7. ISO standards, Chicago Manual of Style, other guides

 6.8. indexes in the book production process

 6.9. index updates and page reflow

Lesson 7: Indexer Skills and Dispositions

 7.1. skills of indexers

 7.2. dispositions and personalities of indexers

 7.3. webinar – “Ethics in Indexing” with Heather Ebbs

Exercises for Module 1

1. Use the “Look Inside” feature on Amazon.com to compare the text and indexes of two books on herbal medicine – one for enthusiasts and one for herbal professionals (Lesson 1)

2. True/False quiz on functions of an index (Lesson 1)

3. Section Headings (Lesson 2, Exercise 2.2.1a)

4. Main Headings (Lesson 2, Exercise 2.2.1b)

5. Subheadings (Lesson 2, Exercise 2.2.2a)

6. Group terms from terminology list into appropriate category – parts of a book, indexing formatting, entry array formatting, or indexing process (Lesson 3)

7. Term selection indexing exercise as below (Lesson 4)

8. Thematic relationships and classification (Lesson 5, Exercise 5.3a)

9. Indexing formatting exercise as below (Lesson 6)

10. Self-evaluation on skills of indexers (Lesson 7)

11. Self-evaluation on dispositions of indexers (Lesson 7)

Indexing exercises for Module 1

1. Term selection with Janet Perlman’s article “So You Want to Be an Indexer?” (in Lesson 4)

2. Formatting list of entries according to specification (in Lesson 6)

Indexing software: do each exercise in a different software package

Final Exam for Module 1

TBD

**Module 2 – Indexing Process (How do you approach material; editing tasks)**

Objectives of Module 2

The student should be able to:

O.1. Understand the steps in creating an index

O.2. Select appropriate terms from a document

O.3. Be aware of various indexing approaches

O.4. Formulate main headings and subheadings

O.5. Create cross-references for related concepts and terms

O.6. Format reference locators according to specifications

O.7. Format entries according to specifications

O.8. Understand the tasks in editing an index for accuracy, consistency, comprehensiveness, and conciseness

O.9. Become acquainted with the process of embedded indexing, the software packages available, and the growing importance of embedded indexing in publishing

Lesson 1: Steps in Creating an Index (overview)

 1.1. receiving and responding to a query; establishing the deadline

 1.2. receiving page proofs

 1.3. use of computers & software in the indexing process

 1.4. data entry

 1.5. editing the index (may be iterative with data entry)

 1.6. author review of index, if applicable

 1.7. revisions based on author feedback, if applicable

 1.8. submission of final index

Lesson 2: Term Selection and the Indexing Process

 2.1. understanding of the material to be indexed

 2.2. indexable features

 2.3. analyzing the document; asking “What is this section about?”

 2.3.1. metatopics & local metatopics; level of detail

 2.3.2. webinar – “Taming the Metatopic” with Kay Schlembach

 2.4. relationships among concepts (thematic relationships, etc.)

 2.5. ASI website article “How I index: advice from real indexers”

 2.6. demonstration of term selection in real time à la Fred Leise’s “Naked Indexer”

 2.7. working on-screen or with paper

 2.8. marking proofs or not

 2.9. macros

 2.10. webinar – “PDFs in the Indexing Process” with Connie Binder

Lesson 3: Main headings and Subheadings

 3.1. nouns and noun phrases

 3.2. headings and the structure of an index

 3.3. creation of subheadings

 3.4. references on main headings and subheadings

3.5. related topics: keywords, inversions, implied concepts, plural vs. singular, preposition use, use of “and,” locators at main heading level

 3.6. lots of examples of indexed text (length ~ a few paragraphs to a couple of pages)

Lesson 4: Cross-references and Double Postings

4.1. types and when to use them; how many is too many?

 4.2. “*See*” relationships

 4.3. “*See also*” relationships and classes

 4.4. general cross-references

 4.5. formatting and placement of

4.6. broader and narrower terms, preferred and non-preferred terms, synonyms and antonyms

 4.7. cross-references versus double-posting – understanding differences and when to use

Lesson 5: Reference Locators

5.1. simple: page or paragraph number

 5.2. complex: chapter/volume numbers; locators for legal indexes

 5.3. unruly

 5.4. formatting of; arranging for different elements

 5.5 considerations for embedded indexing, e.g. paragraph line breaks

Lesson 6: Editing, Part I: Accuracy, Consistency, Comprehensiveness, and Conciseness

 6.1. spelling

 6.2. punctuation

 6.3. locators (accuracy, style, and punctuation)

 6.4. parallel construction

 6.5. typical errors (your own and others’)

 6.6. accurate representation of text; equal and proportionate coverage of topics

 6.7. appropriate granularity

 6.8. appropriate use of function words

 6.9. use of parenthetical qualifiers if needed

 6.10. appropriate gathering of related topics

 6.11. double posting and cross-references

 6.12. alphabetization

 6.12.1. special characters

 6.12.2. numbers

 6.12.3. prefixes to chemical compounds

 6.12.4. articles

 6.12.5. prepositions and conjunctions

 6.13. length and space limitations

 6.14. evaluating index for usability

 6.15. final proofreading

 6.16. editing as you go along vs. editing at the end

Lesson 7: A Brief Introduction to Embedded Indexing

 7.1. introduction to embedded indexing process

 7.2. software packages typically used

 7.3. video/webinar demonstrating process and software

Exercises for Module 2

1. Term selection exercise TBD (Lesson 2)

2. Main headings and subheadings exercise (Lesson 3)

3. Cross-references exercise (Lesson 4)

4. Locators exercise TBD (Lesson 5)

5. Granularity exercise (Lesson 7)

6. Double posting exercise (Lesson 7)

Indexing exercise for Module 2

 “Kitchen Companion” article or KeyWords article or Project Gutenberg text – use third software package

Final Exam for Module 2

Exam index - Dietary Guidelines from current Module B? (student can choose software package)

**Module 3 – Exploring Index Structure in Further Depth**

Objectives of Module 3

The student should be able to:

O.1. Understand approaches to index structure

O.2. Understand how to handle names

O.3. Know how to access resources for handling names

O.4. Identify and state the metatopic of a document

O.5. Edit an index for length

O.6. Understand the varying approaches to editing

Lesson 1: Index Structure and Structural Indexing

1.1. chapter/section concept entries

1.2. use of title and chapter headings for entries (index entry as pointer)

1.3. table of contents approach to the metatopic

1.4. further exploration of index structure

1.5. more on exhaustivity/depth of indexing

1.6. run-in vs. indented format

1.7. multiple entry points

Lesson 2: Names in Indexes

2.1. types of (people, organizations/entities, geographical, legal cases)

2.2. particularities

2.3. titled persons, foreign names

2.4. cited authors

2.5. glosses/parenthetical qualifiers

2.6. abbreviations and acronyms

2.7. references and resources

2.8. webinar – “The Glory and Nothing of a Name” with Noeline Bridge

2.9. webinar – “Indexing Arabic Names” with AElfwine Mischler

Lesson 3: Metatopics

3.1. “aboutness”

 3.2. identification of metatopics

 3.3. metatopic entry as map to primary concepts (pointer entry)

 3.4. treatment of metatopic (coverage/subheadings)

 3.5. multiple/parallel metatopics

3.6. webinar – “On Aboutness – Determining What It’s All About” with Kate Mertes

Lesson 4: Editing, Part 2: Editing processes; layout, and typographic considerations

4.1. check for and fix any outstanding questions/queries

 4.2. validate cross-references

 4.3. check for large page numbers (beyond the range of the text)

 4.4. spell check

 4.5. validate subheadings

 4.6. check for instances of overindexing

 4.7. validate metatopic entry/structural entries

 4.8. final complete read-through

 4.9. estimating length (look at comparable books; set target length before starting)

 4.10. adjusting length – cutting or increasing

 4.11. typography, line length, justification, spacing, letter breaks, continued lines

 4.12. evaluating index for usability

 4.13. evaluating index for elegance

  4.14. varying approaches to editing

 4.14.1. editing at the end

 4.14.2. editing as you go – multiple methods

Exercises for Module 3

1. Index structure exercise TBD (Lesson 1)

2. Use various resources (biographical dictionary; website) to find how to index list of

names (Lesson 2)

3. Metatopics exercise TBD (Lesson 3)

4. Edit an index (Lesson 4)

Indexing exercise for Module 3

TBD

Final Exam for Module 3

Exam index – Climate change impacts document from current Module C?

**Module 4 – Special Topics in Indexing & Business of Indexing**

Objectives of Module 4

The student should be able to:

O.1. Be able to apply the various special practices in indexing

O.2. Develop a basic understanding of the numerous subject specialties

O.3. Develop a basic understanding of special types of indexes

O.4. Know what goes into setting up a home office

O.5. Understand the financial considerations of running an indexing business

O.6. Be aware of the need and opportunities for professional development

O.7. Be aware of typical project management processes

O.8. Create a simple embedded index

O.9. Create an index for a fairly complex document, subject to length limitations

Lesson 1: Special Practices in Indexing

 1.1. non-alphabetic arrangements

 1.2. numbers and symbols

 1.3. acronyms and abbreviations

 1.4. foreign words in the text

 1.5. diacritics

 1.6. conventions of bibliographic references

 1.6.1. full first names vs. initials vs. a mix of both

 1.7. handling introductory material

 1.8. submission formats for index files

Lesson 2: Subject Specialties

2.1. biographies

2.1.1. information on formatting sub-subheadings

2.2. cookbooks

2.3. law

 2.3.1. tables of legal cases

2.4. literary criticism

2.5. Locorum indexes

 2.6. medicine

 2.7. music

 2.8. Scripture indexes

 2.9. textbooks

2.10. webinar – “Indexing Lives: Savvy Strategies for Indexing Biographies and Memoirs” with Connie Binder

 2.11. webinar – “Indexes Locorum” with Kate Mertes

 2.12. webinar – “Textbook Indexing” with Diana Witt

Lesson 3: Special Types of Indexes

 3.1. name/author indexes

 3.2. multiple indexes for one document

 3.3. updates to previous indexes

3.4. embedded indexes

 3.4.1. Microsoft Word

 3.4.2. InDesign

 3.4.3. Index Manager

 3.5. e-book indexes

 3.6. database indexing

 3.7. journal indexing

 3.8. controlled vocabularies/thesauri

 3.9. webinar – “Indexing with Index Manager” with Pilar Wyman

 3.10. webinar – “Embedded Indexing – Working with Your Client” with Jan Wright

3.11. webinar – “An Introduction to James Lamb’s CUP/XML WordEmbed” with Jim Fuhr

Lesson 4: Business of Indexing, Part I: Setting Up an Office; Financial Considerations & Professional Development

 4.1 home office setup

 4.1.1. essential equipment

 4.1.2. software

 4.1.3. backups

 4.1.4. ergonomics

 4.1.5. reference sources

4.2. marketing

 4.3. fees/fee structure; determining hourly rate

 4.4. charging for and bidding on jobs

 4.5. cash flow; bank account(s)

 4.6. taxes; independent contractor status

 4.7. professional society resources; membership; networking with other indexers

 4.8. mentoring and apprenticeships

 4.9. continuing professional development

4.10. webinar – “Creating and Securing Your WordPress Website for Marketing Success” with Joanne Sprott and Rich Hamilton

4.11. webinar – “How to Increase Your Business Using the Indexer’s Best Secret Marketing Weapon” with Connie Binder

4.12. webinar – “Business Strategies for Indexers” with Sergey Lobachev

4.13. webinar – “The Way Forward – Current and Future Issues for Publishing and Indexing” with Diana Witt

Lesson 5: Business of Indexing, Part II: Project Management

 5.1. working with editors, authors, and packagers

5.2. process before accepting a project

 5.2.1. obtain sample chapter

 5.2.2. check if qualified to index material

 5.3. contracts and non-disclosure agreements

5.4. receiving page proofs

5.5. index size estimation

5.6. indexing process

 5.7. delivering the index

 5.8. invoicing and follow-up

 5.9. subcontracting

5.10. large projects/working in teams

5.11. time management

5.12. scheduling

5.13. webinar – “Creating and Maintaining Speed in Indexing” with Kate Mertes

Exercises for Module 4:

1. Exercise(s) addressing special problems in indexing (Lesson 1)

2. Exercise(s) addressing subject specialties (Lesson 2)

3. Exercise(s) addressing special types of indexes (Lesson 3)

4. Exercise(s) to help student prepare for professional work (Lessons 4 & 5)

Indexing exercises for Module 4:

1. Prepare simple embedded index in Microsoft Word

2. Prepare index for large-ish document, according to given specifications, including length limitations (graded for content and format)

Final Exam for Module 4:

TBD