

Directions in indexing

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As an indexer, I provide directions for readers and researchers so they can find information. Sometimes I provide directions to material they know they are looking for. Sometimes I provide directions to material that they do not know they are looking for. The challenge in writing indexes for books, monographs, cumulative works, and other closed sets of materials is to provide a good map regardless of what your readers are looking for. The goal of a quality index is simple: to provide a navigation aid to the information.

There is no one clear, best sign as to what direction indexing is going, however. I considered providing a photograph of some of the more challenging road signs I have seen to illustrate this quandary. Recently, while in San Diego, California, I saw a wonderful sign that included labels to “Jaws, 2,535 mi. à,” “Tacos ß,” “Malibu, 150 mi. à,” and other destinations such as “Pipeline.”



Beachside sign in front of the Hotel del Coronado, San Diego, California (photo by the author)

The future of back-of-the-book style indexes is full of as many possible destinations, and more. Some of these possible destinations may pique our professional and intellectual curiosity, some may be frightening. Some of these possible destinations may have known and measurable paths to them, some may not. While I cannot say for sure where we will end up, I do have some ideas.

The path to indexing

First, let me share how I, personally, got here and the path I took. Like many professional indexers (and other professionals), my career path has been serendipitous and unplanned.

One of my first jobs, in the summer of 1979, included filing articles for the Middle East Bureau Chief of *The Washington Post*. At the time, I did not realize the training this exposure to a catalogue system provided me. I found the work and material intriguing, interesting, and satisfying.

Four years later, as a Liberal Arts college student in 1983, I began to work part-time as a typist doing computer data entry. I swore, when I learned to type as a pre-teen, that I would never take a job where typing was all I did. I didn't mind the occasional jobs for classmates and other students who paid me to type their papers and essays. But for this part-time job, I also paid attention to what I was typing.

I worked for a professional, freelance, full-time book indexer: Maria Coughlin. She marked up paper page proofs of books ready for publication, and I then entered index text accordingly into her computer, along with the number of the page her mark-up appeared on. In the beginning, I entered this text into word-processing software.

(Other indexers at the time wrote their index entries for a book on index cards, and then turned that box of index cards over to a typist for conversion into an index document.)

Soon, though, professional indexing software became available and I entered text directly into the computer via one such tool: Cindex™ (available from <https://www.indexres.com/>). This professional indexing software provides automated alphabetization and all sorts of formatting and editing. I was a fast typist and Maria and I worked well together. Over time, I noticed patterns, and sometimes I noticed inconsistencies, or what I thought were inconsistencies. I asked questions about what I was typing. I learned to anticipate how she might mark up text. Our relationship became a de facto apprenticeship.

I continued this work until I graduated from college. At one point, while studying in another state one year, I also worked as a technical writer. When I returned to the area for visits with family, I would again do data entry work and help Maria with indexing. In early 1989, after a couple years of graduate study in mathematics, I again returned to the area and officially joined her company, M. L. Coughlin Editorial Services, as an Associate Indexer. At this point, I also began to mark page proofs myself.

Clearly, I enjoyed the work and it was a good fit. Periodically, other students also joined the company. Some of these others also found the work a good fit, some did not. Even though most who first come to the work are self-selecting, indexing work is not for everyone.

In 1990, I launched my own indexing business: Wyman Indexing. Like Maria, I had a computer, and I worked from a home office. I also continued to work part-time for Maria, at her home office, until 1993.

The path indexing has taken since

Intellectually, the process of indexing and writing an index is always the same: read, review and analyze (ask and determine, "What is this about?"), record succinctly, repeat until the entire text has been processed, review and edit the index, stop.

This process is not that different for database indexers, though they generally do not have as much control of the final index or database.

Since launching my business, however, indexing work has changed in several ways, just as technology and publishing have also evolved. While I still work from a home office on a computer and with professional indexing software, software tools have changed, the materials I use have changed, the materials I index have changed, and the work process has changed.

I still use Cindex™. In fact, I swear by it. But it has changed and updated itself, continuously. Additional indexing software tools are also available, and I now counsel beginning indexers to test them all before committing to any. I also use Index-Manager (<http://index-manager.net/en/home/>) now, for projects that require embedded indexing.

I no longer work at a desktop computer. Like many of you reading this, my tools have shrunk as technology has advanced. My main computer is a tablet laptop, and I back-up to the cloud. I also rarely use a printer anymore as I email files to my clients (vs printing out manuscripts and sending them via FedEx along with a disk copy of the index file).

I still index books, as well as other materials such as collections of documents, but I used to also index many journals. That is, I used to write cumulative volume indexes for journals, as you would see in the last issue of an annual volume of a periodical. With ubiquitous Internet access, most journals now provide digital copies and full-text search of their materials, and they no longer include so many indexes.

My work process has also changed. I no longer always include page numbers when I type or create index entries. As technology has advanced, publishing has also changed. Instead of working from paper page proofs, I now work from electronic page proofs or from manuscript files. I may be reading from another monitor now, vs a stack of paper as I did when I worked for Maria. When I work from electronic page proofs, I may include page numbers with my index entries, or I may include some sort of unique identifier (UID) for the text I'm indexing. When I work from manuscript files, I may include some sort of UID for the text I'm indexing, or I may use Index-Manager and write the index directly into the manuscript where it is hidden and embedded for generation with final page numbers when the manuscript is ready for publication.

Embedded indexes and UIDs allow publishers to speed up the production process, and make it easier for publishers to reuse content – for new editions including in different formats, such as digital or e-books.

There have been repeated technical challenges as technology has evolved. Some clients have experimented with XML, for example, while they explored publishing editions on the web or for handheld devices or for mobile apps. Other clients have explored ways to embed their indexes. I have had to stay current and on top of technology and all these developments.

There have been repeated fiscal challenges in the face of global competition. Some clients have left me for cheaper indexers and lower production costs in India or other off-shore markets. Most have come back, but not all. I have had some fallow periods, briefly, and am not always booked as far in advance as I may like.

There have been repeated burnout challenges, as well. Generally, I have found there is a lot of work to be done, so much so that I often think I could easily work every day of the week, every week of the year. At one point, when facing burnout, I took a job part-time as a librarian at my children's school. This gave me a change of pace and allowed me to better structure my time. This also forced me to say, "No" to a lot of projects. I have to say, "No" to a lot of projects because I can only accommodate so much work. Some clients have learned that advance notice is best, but many authors and others are unable, it seems, to plan ahead. Some aspects of publishing never change.

Possible paths forward for indexing

Again, it has been a challenge to stay current with technology. For me, this has been a challenge I have relished. I was an early computer user and studied computer programming as a teenager, and I have enjoyed staying current with technology and computers. I also know there is more I could learn, however, always. I am grateful for new software such as Index-Manager which allows me to keep indexing in a way that is useful for publishers and other clients. Anybody who is considering indexing or a related field should anticipate continuous professional development and education to stay current with technology.

Embedded indexes allow indexes to stay with the books they supplement regardless of how they are being published, and for indexes to be produced before books are in final form. Thus, it seems to me that embedded indexing may be here to stay. I also know of many other indexers who embed their indexes or provide embedded indexing services but who work in Word or InDesign or other publishing tools directly.

But I'm not sure.

Perhaps some publishers are simply leery of letting go of their files, and do not trust embedding not to introduce errors or provide other complications to their workflows.

I, personally, still have more work with UIDs or page numbers than I do embedding.

Students prefer printed textbooks. Many of us still prefer hard copy for much of our reading. Print books are still here. This means that job security for indexers is not in doubt, for now.

I do recommend indexing as a career option. I'm not sure what form indexes will take, or how indexing and the writing of indexes will proceed or with what tools, but indexes themselves do not seem to be going away.

Information access is still key. It's still true that if readers or researchers can't find something, it might as well not exist.

I was grateful for that sign on the beach. Who doesn't appreciate or want to know where to find tacos, or where the sharks are? We all do. It's the same with indexes. We need and want to know where to find information and things, and we appreciate those who point us in the right direction.