

UC BERKELEY EXTENSION

Indexing: Theory and Application X477

About the Course

Course Description

This course covers the fundamental principles of indexing. The focus is on the basic format, guidelines, and how to approach term selection for indexing. Instruction is applicable to stand-alone, embedded, and Web indexing.

You will be introduced to three indexing software programs, and will use them to complete the indexing assignments. You will also learn about the business side of indexing -- working with clients, handling financial issues, and delivering indexes specific to the needs of different kinds of publishers.

This course is designed for those interested in becoming freelance indexers for university presses, textbook and trade book publishers, business corporations, and technical companies. This course is also appropriate for both in-house indexers and technical writers who want to index their own manuals. Material will be presented on the specific indexing requirements of university press, textbook, trade book, and documentation text.

Learning Outcomes

This course has three main objectives. They are to

- introduce you to basic indexing practices
- provide materials and assessments through which you will acquire the skills and knowledge base required to index professionally
- give you enough practice in indexing so that you can assess your aptitude and desire to pursue a career in the field

Upon successful completion of this course, you should be able to

- understand indexing terminology and use it appropriately
- use indexing software to create both stand-alone and embedded indexes

- write an index by following format specifications and guidelines
- write a simple embedded index
- understand the business aspects of indexing, including working with editors and authors

Prerequisites

There are no prerequisites for this course, but you are expected to have strong language and reading comprehension skills. You should also have strong computer and online research skills, as you will need to download and install files, research on the Web, and attach files to e-mail messages.

Course Materials

Required Textbook

For more information about ordering textbooks, click on the Course Information folder at the top of the Modules tab page.

- *Indexing Books* by Nancy C. Mulvany, second edition (University of Chicago Press, 2005).
- *Indexes: A Chapter from the Chicago Manual of Style, 16th ed.* (University of Chicago Press, 2010).
Note: This title is a chapter taken from *The Chicago Manual of Style, 16th ed, 2010*, so if you already own the full CMS, you do not need to purchase the stand-alone chapter.
- Student versions of CINDEX, MACREX, and SKY indexing software.

Technical Requirements

You must use all three indexing programs for three short exercises in the first half of the course. (Afterwards, you may choose one of the programs to complete the rest of the assignments.) Of the three programs, only CINDEX provides a version that works on the Macintosh OS. But students using the Macintosh OS can successfully complete the course in one of two ways: (1) their Macintosh computers must have software such as Parallels Desktop for Mac or Microsoft Virtual PC to run Windows-compatible software, or (2) they must have access to a PC to complete the first three exercises in the course. The texts for the indexing assignments are in portable document format (PDF) files. To read PDF files, you must have Adobe Acrobat software loaded on your computer. If you do not already have this free software, [download it](#) now.

Course Outline

You'll find complete instructions for your assignments within the course modules.

Module 1: Introduction

Reading Assignments

Commentary

- 1.1 The Five Fatal Myths of Indexing
- 1.2 What Is an Index?
- 1.3 Main Headings
- 1.4 Subheadings and Sub-subheadings
- 1.5 Index Structure: Indented, Run-in, and Blended Formats
- 1.6 Reference Locators
- 1.7 Cross-References
- 1.8 Double-Posted Entries

Textbooks/Reader

Mulvany: pages 16-20, 63-67

Chicago: Sections 16.1-16.28; 16.109-16.113; 16.116

Discussion Assignments

Online Research

Module 2: Creating a Basic Index

Reading Assignments

Commentary

- 2.1 Index Structure
- 2.2 Identifying Main Headings
- 2.3 When to Use General Main Headings
- 2.4 Identifying Subheadings and Sub-subheadings
- 2.5 Sorting
- 2.6 See Cross-References

- 2.7 *See also* Cross-References
- 2.8 *See under* Cross-References
- 2.9 General Cross-References
- 2.10 Indexing Software
- 2.11 File Formats
- 2.12 Indexing Exercise 1

Textbooks

Mulvany: pages 79-109, 113-127, 192-217, 252-253, 267-269

Chicago: Sections 16.9-6.23; 16.29-16.31 (this will be a review of the Module 1 reading); 16.56-16.70; 16.94-16.100; 16.117-16.131

Online Research

Discussion Assignments

Indexing Exercise 1

Module 3: Term Selection

Reading Assignments

Commentary

- 3.1 Introduction to Term Selection
- 3.2 Comprehension of the Material
- 3.3 Asking the Information Questions
- 3.4 Indexing "Humpty Dumpty"
- 3.5 The Importance of Good Term Selection
- 3.6 Identifying Metatopics and the Meaning of the Text
- 3.7 Concepts and Thematic Relationships
- 3.8 Identifying Thematic Relationships
- 3.9 Indexing Exercise 2

Textbooks

Chicago: Sections 16.9-16.10; 16.29-16.31; 16:126-16.130 (this will be a review of some of the Module 2 reading)

Mulvany: pages 49-51

Indexing Exercise 2

Online Research

Discussion Assignments

Module 4: Indexing Specifications

Reading Assignments

Commentary

- 4.1 Text Type and Audience
- 4.2 Determining Your Audience
- 4.3 Indexing Specifications Issues
- 4.4 Scripture and Locorum Indexes
- 4.5 Poem and Song Indexes; Musical Titles
- 4.6 Indexing Cookbooks
- 4.7 Introduction to Name/Author Indexes
- 4.8 Name/Author Indexes for Specific Text Types
- 4.9 Special Issues in Indexing Names
- 4.10 References for Names
- 4.11 Diacritics
- 4.12 Using Software to Create Name/Author Indexes
- 5.0 Indexing Exercise 3

Textbooks

Chicago: Sections 16.29-16.54; 16.62-16.67; 16.71-16.93; 16.141-16.145

Mulvany: pages 13-16, 25-28, 51-56, 117-118, 158-187, 206-208

Indexing Exercise 3

Online Research

Discussion Assignments

Module 5: Writing a Full-Length Index

Reading Assignments

Commentary

5.1 Example of the Indexing Process

5.2 Indexing Project 1

Textbooks

Chicago: Sections 16.101-16.131

Mulvany: pages 56-62

Indexing Project 1

Discussion Assignments

Module 6: The Business of Indexing

Reading Assignments

Commentary

6.1 Indexing Project Process: An Overview

6.2 Receiving an Indexing Request

6.3 Agreeing to a Fee Structure

6.4 Indexing Specifications

6.5 Arranging Due Dates

6.6 Complying with IRS Independent Contractor Criteria

- 6.7 Receiving Page Proofs
- 6.8 Estimating Index Size
- 6.9 Indexing the Text
- 6.10 Editing and Proofing the Index
- 6.11 Delivering the Index
- 6.12 Indexing Exercise 4

Textbooks

Chicago: Sections 16.101-16.131 (this is a review of Module 5 reading assignment)

Mulvany: pages 23-25, 28-42, 69-73, 221-241

Indexing Exercise 4

Online Research

Discussion Assignments

Module 7: Developing Your Own Process and Style

Reading Assignments

Commentary

- 7.1 The Individuality of the Indexing Process
- 7.2 Indexing Expert A
- 7.3 Indexing Expert B
- 7.4 Indexing Expert C
- 7.5 Home Office Issues
- 7.6 Indexing Project 2

Textbook

There is no textbook reading assignment in this module.

Indexing Project 2

Online Research

Discussion Assignments

Module 8: Putting It All Together

Reading Assignments

Commentary

8.1 Mentoring, Apprenticeships, and Subcontracting

8.2 Tax ID Information

8.3 Marketing and Building a Client Base

8.4 Using Software Tools to Enhance the Indexing Process

8.5 Indexing Project 3

Textbook

There is no textbook reading assignment for this module.

Indexing Project 3

Online Research

Discussion Assignments

Module 9: Embedded Indexing: Indexing a Web Site

Reading Assignments

Commentary

9.1 Embedded Indexing Using Word

9.2 Indexing Exercise 5

9.3 Embedded Indexing Using FrameMaker

9.4 A Quick Look at Indexing in FrameMaker

9.5 Setting Fees for Embedded Indexing

9.6 Indexing a Web Site

- 9.7 Embedded Indexing Using HTML Indexer
- 9.8 Embedded Indexing with DEXEmbed and WordEmbed
- 9.9 Embedded Indexing with InDesign
- 10.1 E-books, A New Frontier for Indexers

Textbook

Mulvany: pages 253-271

Indexing Exercise 5

Online Research

Module 10: Controlled Vocabularies and Database Indexing;

Reading Assignments

Commentary

- 10.1 Controlled Vocabularies: Finding and organizing information
- 10.2 Types, Formats, and Uses of Controlled Vocabularies
- 10.3 The Process of Creating Controlled Vocabulary
- 10.4 Database Indexing
- 10.5 Indexing Exercise 6: Creating a Thesaurus
- 10.6 A Last Word

Textbook

There is no textbook reading assignment for this module.

Exercise 6: Creating a Thesaurus

Discussion Assignments