

# Subject knowledge – how it helps take care of the business

Sylvia Coates

---

*Sylvia Coates examines how respecting and complying with specific academic style guides and conventions may lead to better client relationships, increased professional credibility, and a steady supply of indexing projects.*

---

Last summer I was indexing a project which had a number of titles incorrectly formatted in the text. Most of these errors were easy to recognize and correct, along with a written flag for the editor, except for one specific title. The title in question was Tchaikovsky's Symphony No. 6 in B minor, 'Pathétique'. The text was not on a music-related topic but this title was used as an example to illustrate a point. Though music theory is not a topic I work in, I vaguely remembered that musical titles have different, and very specific, formatting requirements depending on the type of music. Unfortunately that was all I could remember, and given the number of format errors in the text, I could not assume that Pathétique was correctly formatted. Pathétique was in quote marks in the text and I needed to know if this was correct.

The hour was late and the index was due first thing in the morning. So I turned to what is so often the last refuge in a crisis – the indexing discussion list. Personally speaking, I think that asking for information on any discussion list is often akin to yelling out for directions on a crowded street. You never know the expertise of who might respond or if their answer will be accurate. You might receive excellent and accurate information but it is just as likely that you will not. However, this was an emergency and I tried to screen by asking that only indexers with music theory expertise respond to my query. Naturally I heard, both on- and off-list, from many indexers without music theory expertise, who all turned out to be completely off the mark. Eventually two different indexers alerted me to *Writing about music: a style sheet* by D. Kern Holoman and the *Juilliard style manual*. Both of these excellent references provided me with the information that I needed.

For those of you who are curious, the answer to my query turned out to be that if a symphony is named by the composer, the title is placed in italics, but if the name is a common one, not given by the composer, then quote marks are used. Since 'Pathétique' is a common name it should correctly be placed in quote marks. It is unlikely that an indexer, no matter how experienced, could guess or reason this out. This is the kind of information that requires music theory expertise or the right reference. And this brings us directly to an issue which I consider to be both of professional significance and an important business decision.

As part of the indexing process care must be taken to adhere to the academic standards and conventions germane to the project. Each academic discipline has its own unique terminology, including jargon, conventions, and style guides, all of which should apply to the index. I contend that failing

to give consideration to these differences may damage an indexer's credibility, reputation, and have a direct impact on their ability to receive repeat work. It also brings the profession into disrepute, and puts potential indexing clients off the idea altogether, causing them to do future indexes themselves or to get a research student to do them.

So in what situation can this become a problem, and how do we guard against the one-size-fits-all trap? First, we need to be cautious about accepting work in areas outside our subject knowledge expertise. While an experienced indexer may be able to bluff their way through an unfamiliar topic, it is unlikely that they will be able to include the nuances of the topic, and they might even introduce errors based on miscomprehension of the text. Most indexers will agree that working in an area outside your subject matter expertise is at best difficult and at worst a recipe for disaster. Consistently working in areas outside one's knowledge base is likely to produce indexes containing noticeable deficiencies. And eventually clients will respond to receiving deficient indexes by ceasing to send repeat work to the indexer. There are a lot of legitimate reasons why an indexer may lose a client, but consistently turning in indexes with subject matter deficiencies not only costs you business but may also impact on your reputation. Editors are all too often reluctant to give negative feedback to indexers, but will share their opinions on an indexer's work with other editors.

A related situation is when we fail to identify the need for specific subject-matter expertise or format convention. My 'Pathétique' title story is such an example. The project topic, a text on critical thinking, was one I am experienced in working with, and the title was used to illustrate a specific point in the text. Ordinarily I would not have questioned the formatting, but since there were book and poem titles incorrectly formatted I could not be certain that it was correct. In this case what was required was not music theory expertise but the awareness that specialized knowledge was necessary. And this brings up another related issue: that all too often we indexers 'don't know what we don't know' and fail to ask the right questions, let alone come up with the right answers.

It is my contention that learning to recognize when specific subject-matter conventions are required, verify that convention, and then how to apply that convention to the index, is an indispensable business skill for indexers. Why? Because editors notice loose ends, and they notice and appreciate it when they can trust the indexer to identify and fix those loose ends. I routinely submit a list of flags to my clients on text errors or items which need to be checked. I have been

surprised over the years to have several editors comment how much they appreciate this, and how seldom they have had indexers submit such a list. I am not suggesting that indexers should feel the need to routinely copy edit or proof the text, but providing a list of noticed errors will be seen as a generous and appreciated practice. And it will also contribute to an indexer's reputation of being a dedicated professional willing to go the extra mile. That kind of reputation is a direct path to building a loyal client base and work security. Furthermore, picking up these so-called loose ends can also help to identify situations requiring special conventions.

And yet, even picking up these loose ends is no guaranteed solution to this issue. There is no easy way to magically discern when a specific convention may be required. And, given that the average full-time indexer may end up working in dozens of different academic disciplines with hundreds of subspecialties, identifying when specialized conventions are needed is at best a daunting task. So how is the poor indexer to proceed under such perilous circumstances?

The critical first step is to admit that we indexers do not have all the answers, and to also resist the temptation to broadly apply some indexing conventions to all situations without question. I can always identify an indexing student who is a technical writer because they will sort all of the numbered entries first in an index. They follow this accepted sort practice of the technical world of indexing, but it is contrary to the practice in traditional publishing, which is to sort numbered entries as they are said out loud. So, for example, the traditional press editor would expect to see the topic of 3D animation sorted in the 'Ts' as though it were spelled out as 'three D animation.' Now, is it incorrect to sort 3D animation in the 'Ts' or incorrect to list it with other numbered entries at the front of the index? The answer is that neither practice is either correct or incorrect in and of itself, but only in the context in which it is applied. In other words, for an index published for a technical audience, numbered entries may be correctly placed at the head of the index. But for an index published by a traditional press for a traditional readership, the same numbered entry 3D animation should be sorted as it is said out loud, 'three D animation'. There are many similar examples of how conventions may vary for different types of publishers and/or academic disciplines. To use the one-size-fits-all approach is to disrespect the distinctive and legitimate practices of professional and academic communities.

The second critical step is to actively engage in professional development and remain open to learning as much about other indexing niches as possible. Stubbornly refusing to learn about other indexing niches is short-sighted. I have found that being exposed to unfamiliar indexing niches facilitates my ability to recognize when a special convention may be called for. I may not be able to recall automatically the specific convention, but being able to identify when one may be required is a tremendous advantage. And as soon as I become aware of that need, I have several options for securing the needed information. One can Google for it, look up online publishing references and/or style guides, consult with valued colleagues, and yes, even query the members of an indexing discussion list. The key to this process is to first recognize when and what needs asking, and then proceed from there to find the answer.

Just to complicate things, indexing conventions are in a constant state of flux, and continued professional development is required to just stay current with these often changing conventions. For example, US indexers are expected to be familiar with the *Chicago manual of style* indexing guidelines, but new editions often modify their own existing guidelines. Let me compare what the *Chicago* 14th, 15th, and 16th editions have to say about a combined poetry authors, titles, and first-line index.

- \* *Chicago* 14th, Section 17.149: Authors' names are set in capitals and small capitals, titles of poems in italics, and first lines of poems in ordinary roman type.
- \* *Chicago* 15th, Section 18.149: Authors' names are set in all-capitalized letters; titles of poems are in italics; first lines of poems are in roman type.
- \* *Chicago* 16th, Section 16.145: Authors' names may be set in caps and small caps, titles of poems in italics, and first lines in roman type, sentence style, without quotation marks.

Clearly there have been subtle but important changes in the *Chicago* guidelines for a combined poetry authors, titles, and first-line index. The indexer who does not stay current with such changes may fail to deliver what is expected by a client following *Chicago*. This is but one example and there are many other such cases. Following the one-size-fits-all approach may eventually damage your credibility as an up to date professional.

Just today I received an emergency indexing project from a favorite client. The editor had received an index, from another indexer, without any parenthetical author citations included. This press follows the APA (American Psychological Association) style guide. Though the APA does not include any information on indexes, the academic publishers following this style-guide have developed a set of indexing guidelines quite different than *Chicago*. Contrary to *Chicago* guidelines, publishers who follow the APA typically require parenthetical author citations to be included in the index. The editor in this case was furious, and I am pretty certain that the indexer in question will be removed from their freelance indexer list.

I have limited my discussion to the importance of knowing the subject-specific indexing conventions relevant to the indexing project in question. Many of the same considerations apply to the actual subject matter, and the importance of knowing enough about the subject matter of the book and the likely specialist user need to know what is indexable material, what terms to choose, when different words mean the same thing, or the same words mean different things.

The best indexer-client relationship is one built on mutual respect and trust. Our clients trust us to provide them with indexes that are well done and follow the required academic and style guide standards as needed. Failure to do so may result in angry clients, harmed professional credibility, and a damaged indexing business. On the other hand, taking care to adhere to the required academic and style guide standards as appropriate will enhance your client relationships and boost your indexing business to new heights.

## References

- Holoman, D. K. (2008) *Writing about music: a style sheet*. Berkeley, Calif.: University of California Press.
- Juilliard style manual – musicological terms*. Available at: <http://intranet.juilliard.edu/departments/publications/documents/Style-Guide-Musicology.php> (accessed September 29, 2010).

*Sylvia Coates has been an indexer since 1989 and has taught indexing for over 11 years. In 2004 she developed the online UC Berkeley Indexing Theory and Application course, which was awarded the 2005 DLCoPC (Distance Learning Community of Practice) Award in recognition of innovation and quality of instruction by the UCEA (University Continuing Education Association). Sylvia and her non-indexer husband live in the San Francisco Bay Area. Email: [sylvia@sylvia.coates.com](mailto:sylvia@sylvia.coates.com)*

## The Blair Index Project

A discussion on Index-L (8–10 September 2010) about ‘indexer neutrality’, arising from a review of Tony Blair’s memoirs, *A Journey*, developed in an unexpected direction. The review had quoted such subheadings in the entry for Gordon Brown in the index as ‘disagrees with TB over economic policies’; ‘disagreement over euro’; ‘opposes TB on all fronts’; ‘reasons for not sacking’; ‘organises coup’; ‘loses 2010 election’.

ANR reported:

I am holding Blair’s book in my hand – I looked in the index for the reported index entries that the reviewer quoted – and they are not there.

Entry for Brown, Gordon: 5, 9, 24, 27, 28, 39, 41–2, 52–6, 58, 60, 63–4, 66, 67, 68, 69–70, ... 669–70, 674

The string of undifferentiated page numbers is 100 locators long.

Unless the American edition is vastly different, I don’t know where the book reviewer was getting his subheadings. In this book there are none.

The index is very close to being useless.

Alarm and confusion followed. It turned out that none of the headings in the index to the US edition had subheadings, ‘just paragraphs of page numbers’. One contributor suggested that ‘the reviewer got an advance reader’s copy that included the full index, and that for some reason after that point the publisher decided to save space by removing all subheads’. Another suspected a ‘massive conspiracy within the Labour Party’. A bit of detective work on the British side of the pond revealed that the UK edition had its due quota of subheadings. CS wrote:

It’s difficult to tell without comparing the two side by side, but it seems possible that it is in fact a different index from the one in the US edition, which I’ve inspected via amazon.com’s Search Inside feature. I noticed that ‘Blair, Bill’ in the US version is ‘Blair, William (Bill)’ in the UK one, and that the latter has the following entries:

Blair, Leo (father)  
Blair, Leo (son)

whereas the former has

Blair, Leo (Blair’s father)  
Blair, Leo (Blair’s son)

and in the subheadings in the UK version the author is referred to as ‘TB’ rather than ‘Blair’.

Not only this, but the introductions to the respective editions are completely different. The longish US introduction is all about the author’s relationship with America and the three presidents with whom he has worked, including ‘President Obama, who I never worked with when in office but who I work with now in the Middle East’ (grammar!). The UK introduction is, I think, shorter and makes little or no mention of the US. Not that this has anything to do with the index, except that it leads me to suspect that other changes have been made to the text for US consumption, perhaps resulting in the preparation of a modified or altogether different index.

DW commented:

This is amazing. I know that sometimes books have been published in different editions for different sides of the pond, but the differences here create almost two different books in my opinion. Particularly the differences in the index. It would be really interesting to find out what the motivations are for creating two such different texts. Was it a marketing decision? Political? How much did Blair himself have to say about the changes? We’ll probably never know, but the issue of indexing neutrality now has to be put into the much larger context of what constitutes ‘original’ work here, both in the text and the index. It’s not even possible to say with certainty if there is a first edition of this book. Neutrality in this case is almost a meaningless term, since giving a certain slant to the contents is clearly one of the intentions of the publishers and possibly the author.

At the time of going to press, the identity of the indexer or indexers in question has not been established.

## References

- Blair, T. (2010) *A journey*. London: Hutchinson.
- Daily Telegraph* (1 September 2010), ‘Tony Blair’s memoirs: a breathless journey laced with revenge’, [www.telegraph.co.uk/comment/telegraph-view/7976245/Tony-Blair-memoirs-a-breathless-journey-laced-with-revenge.html](http://www.telegraph.co.uk/comment/telegraph-view/7976245/Tony-Blair-memoirs-a-breathless-journey-laced-with-revenge.html)