UC Berkeley Extension course: learning to index at a distance

Sylvia Coates

In this article, four UC Berkeley Extension course students say what made them decide to embark on an indexing career and describe their experiences learning at a distance. They also offer some insights into why indexing is more difficult than it looks at first sight.

As an indexing instructor of several years I was delighted to have the opportunity to develop a distance-learning indexing course for University of California (UC) Berkeley Extension, which opened for enrolment in October 2004.

I had often wished for a teaching venue that could better recreate the real-world conditions of indexing. A distance-learning course provides the opportunities for students to use indexing software to prepare and send index files just as they would for a client. The class message board encourages class discussion and communication between students while also allowing students to work independently just as working indexers do. UC Berkeley Extension's infrastructure allowed me to develop a curriculum that facilitates student learning, and Berkeley's high standards ensured the creation of a high-quality course.

This six-month course currently has two instructors and sections. I teach one of the sections and Jan Wright, who wrote much of the embedded indexing unit, teaches the second section. At least one of the sections is always open for student enrolment.

In preparing for this article I was asked to provide student statements regarding their experience with the course. The first student is midway through the course, the second is almost finished, and the last two are former students who have completed the course. They all have slightly different, and fascinating, perspectives on the course.

Victor Bushell is a technical writer living in the Waramanga suburb of Canberra, ACT, Australia. He is midway through the Berkeley course with Jan Wright as his instructor.

I have worked in surveying and geodesy, the wool industry, munitions manufacturing, the industrial chemical industry, computer operations, seismology and totalisator operations. After spending much of the last 20 years writing user manuals for in-house developed real-time computer operations and pharmaceutical software, I am now in the process of setting up a freelance technical writing and editing business. I believe that indexing will complement this business nicely.

I have had a lifelong interest in mathematics, physics and astronomy along with archaeology, ancient history, philosophy and English, and these areas will, I hope, be a large part of my future life as a freelance indexer cum writer/editor.

I have just completed the first project in the course. This was for a medical text on West Nile Virus and was, I think, an excellent choice for an initial 'real world' project after the preliminary exercises. Like all the other students I found it to be quite challenging. The key thing for me will be to absorb the advice of Jan so that my future efforts are better and more professional. When I saw her feedback on this index I knew that I have a way to go before indexing becomes more intuitive and easy. No doubt this will be borne out by my efforts in the next two projects, on workplace incivility and plagiarism.

The two set texts, Mulvany's *Indexing books* (1994) and 'Indexes' from *The Chicago manual of style* (2003), are complemented by very well written lecture material. This aspect is something of a passion with me because I have had to write for, and teach technical information to, many non-experts. I can recognize the care and expertise that has gone into producing the course material, and it is a pleasure to read.

I was especially intrigued and impressed by the use of nursery rhymes as a learning tool. But then these have all the virtues for this purpose: they are short, easy to understand and everybody has learnt them as children. And as indexing topics they were tricky enough to convince a newbie that they were not as easy as one might first imagine. The subject matter was easy, almost trivial, but to produce a good index was not.

Another excellent requirement of the course is the need to use three of the main indexing software packages: MACREX, CINDEX and SKY Index. This is good training for the future and resulted in some very useful learning hints from other students. I have particularly enjoyed and learnt from the contributions of Jan and the other students though the UC Berkeley message board in our discussions of the several aspects of the course and indexing in general.

Overall, I give the course full marks for a thorough, interesting and innovative approach.

Julie Lobb has several science degrees, a BSc (Agricultural and Bioresource Engineering), MSc (Atmospheric and Oceanic Sciences), and PhD (Earth and Ocean Sciences). Julie lives in Sidney, British Columbia, Canada, with her family which includes two young children. She is close to completing the Berkeley course and her instructor is Jan Wright.

I found out about the indexing profession about eight months ago and thought it would be a great way to apply my

academic background from home. My experience with UC Berkeley's online course on indexing has been very positive. The course curriculum was both thorough and current. I feel satisfied with the overview I received on indexing methodology and practice as well as on the profession's exchange forums and web resources. As a newbie to virtual classroom environments, the online format of the course intimidated me at first. However, after a short adjustment period, I found its instant delivery method to be easy and convenient. The notes were clearly written and offered many references to pertinent outside resources. The feedback I got from my instructor was timely, constructive, and very supportive. There was also a strong message board component to the course which it was easy to grow fond of, as it helped me understand the necessity and benefits of cooperative peer interaction within the profession.

I am thankful that the course required us to develop working knowledge of three commonly used professional indexing software programs (SKY Index, CINDEX and MACREX). I gained an appreciation for the different styles and options of each software program, and was able to ascertain which features I would be inclined to work best with when I started to go into business for myself. I am also happy that we were expected to complete three full-length indexing projects, on top of several smaller exercises. Not only did they force me to integrate the concepts I had learnt, they made me aware of the intricate thinking/decision process that goes behind crafting an index. I learnt, with great relief, that this process is as unique to each indexer as one's fingerprints. And, with time, I would be able to find a methodology which would fit me and allow me to work at a productive pace.

The course was also good in its introduction to the business aspect of freelance indexing. From the start, we were encouraged to join professional indexing bodies, network, and make creative use of our personal backgrounds when strategizing to obtain our first contracts. I now feel I can approach potential clients confident that I know the basic workings of the publishing industry and indexing contracts.

Probably the most important thing the course provided me was a safe environment for feedback and experimentation. I truly appreciate how my instructor worked with my current skill-set, patiently encouraging me to try different ways of thinking and doing, but never putting down my decisions. She helped me be sensitive to my reader, as well as my client and author. (My favourite advice from her: 'Don't make your reader work for nothing. Make each entry worth their while.') She treated me very seriously in time and thought, and that made me feel more like a mentee than an anonymous 'student'. I should also mention that the course atmosphere was in no way competitive. The only competition I felt was from myself as I strived to deepen my understanding and develop my skills.

Estalita Slivoskey lives in Ellendale, North Dakota, with her husband and two small children. She has a BS in Business Management and has worked in various fields of management. Estalita has completed the Berkeley course with Sylvia Coates as her instructor.

For the past three years I have been a stay-at-home mom in order to spend time with my five-year-old daughter and three-year-old son. I discovered indexing almost two years ago, and felt that it was a career that I could pursue from home while still being available for my children, and also something that I would thoroughly enjoy.

I found the indexing class offered by UC Berkeley to be an extremely well-planned and well-written course. The nine units are well organized, and the reading, Internet, and discussion board assignments provide the necessary background knowledge to tackle the indexing exercise or project. The various smaller indexing exercises helped to prepare me for the three full-length indexes that were required to complete the course. The exercises varied in subject matter and degree of difficulty, from indexing nursery rhymes to tackling an embedded index.

One of the exercises that surprised me the most was the one that involved nursery rhymes. It was amazing to me how many different entries could be pulled from just a few lines, and also how different some of the indexes were from the different students. It demonstrated to me how one's background, education, and personal experiences/interests can affect the end result of an index, and that no two are ever alike.

The discussion board was used not only for assignments, but also for students to ask questions or request ideas and feedback from their classmates. It was a very helpful tool to be able to utilize, and a number of us have continued that discussion by setting up an Internet discussion group for UC Berkeley indexing graduates.

In my opinion, the requirement to use all three major indexing software programs is an excellent idea. It helped to be able to learn the basics of each program, and decide which one worked the best for me. Early on in the course I decided to do each of the three full-length indexes using a different software program before making my final decision about the one I would continue to use in my indexing career.

The cost of the course is well worth it for the value of the knowledge to be gained. The student versions of the three software programs are also included in the cost of the course, which is an added bonus.

Having an instructor is a major asset to this course. She would always reply promptly to emails, and would return assignments and exercises in a very timely manner. The feedback given on the assignments was very constructive and honest, and she always welcomed questions and comments.

The course grading was dependent upon how well you accomplished the task and was not competitive with other students.

I attended the American Society of Indexers (ASI) conference in Pasadena this past spring. While attending sessions I noticed that experienced indexers were asking questions about issues to which I already knew the answers. This happened in a number of the presentations I attended. It was obvious to me, after observing this at the conference, that the UC Berkeley course has provided me a tremendous advantage with which to begin my indexing career.

Mary Wendt is a research librarian who lives with her family in Palatine, Illinois, USA. She has completed the Berkeley indexing course with Sylvia Coates as her instructor.

I considered a career move to freelance indexing for some time. I did exhaustive research, read indexing literature, and lurked on INDEX-L. When the UC Berkeley indexing course opened, I immediately looked at the course website. As expected, the course covered topics on the indexing process, such as indexing software, identifying headings, cross-reference usage and the different types of indexes. I was thrilled to find a unit covering the business of indexing. The course was untested. However, I felt Berkeley's reputation for quality would ensure a course with substance. I was in the first group to register.

The course has substance and exceeded my expectations. The course covers all aspects of writing an index in detail. I gained confidence with each index I completed. Because of the requirement to use all three major indexing software programs, I was able to choose my indexing software without hesitation. In addition, I am confident that I understand the business side of indexing. One can learn all these things in many ways. However, I found the format of the Berkeley course an excellent way to learn a great deal in a short time.

Each of the nine units has four components: (1) an online lecture, (2) supplemental reading, (3) an assignment and (4) a message board post. As long as I completed the course in six months, I could do it all at any time. I did most of my work between midnight and dawn.

I found value in all of the course units and learnt new skills from each. Even though I have experience in webpage development, the embedded index unit still had value for me in that it provided information on setting fees. I found creating three mini-indexes to nursery rhymes a fun way to begin learning the term selection process. However, needing to create each one using a different software program complicated the matter. The name index assignment put the lie to the notion that creating a name index is an easy task. The assignment requires the three indexing software programs be used to create three name indexes containing diacritics. I could see that my skill level was improving, and I gained confidence with each of the three full-length indexes. I found my instructor's comments and suggestions a great help. She was available by email to answer questions. Based on her comments and suggestions, I created a list of items to check in the editing process.

In addition to my instructor's comments, my interaction with fellow students was invaluable. In addition to the assigned message board posting required for each unit, students could start a discussion on an indexing topic, and Sylvia started some discussions. I was surprised how much this was like classroom conversation. We discussed a large variety of indexing topics including our marketing plans, setting up a home office, whether new indexers should take lower 'per page' rates, our different ways of approaching the material and the software. We discussed the indexing software a lot. As I read INDEX-L, I am amazed how many topics come up that were part of the course materials and our message board discussions.

The Berkeley course covers the business aspects of indexing. I learnt marketing strategies, how to set fees and arrange due dates, and how to comply with tax regulations as an independent contractor. The process from first receiving the request to delivering the final index to the editor was covered and discussed. The delivery of assignments to Sylvia mirrored the submission of indexes to an editor.

Upon completion of the Berkeley course, I truly felt confident in my ability to work as a professional freelance indexer.

Sylvia Coates has been an indexer since 1989 and began teaching indexing courses in 1999. She lives in the San Francisco Bay Area with her husband. Email: sylvia@sylviacoates.com

References

Mulvany, N. C. (1994) *Indexing books.* Chicago, Il.: University of Chicago Press.

University of Chicago Press (2003) Indexes. In *The Chicago manual of style,* 15th edn. Chicago, Il.: University of Chicago Press.

For more information on the UC Berkeley course:
http://explore.berkeley.edu/UCExt/courseview.asp?secid=517&value=related&action=Internet

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Distinguished member . . . ?

James I, King of England, 390, 737; works in Cambridge University Library, 353

An entry from Esmond de Beer's index to John Evelyn's diary