



Christopher Merrett

Abstract

This chapter considers the special features associated with the indexing of newspapers and provides guidelines for the indexer. The example of indexing *The Times* of London is used as many common features are applicable. The chapter concludes by examining developments in online indexing for easier information retrieval.

Introduction

Although the accuracy of the information they contain must always be questioned and treated with caution, newspapers are an indispensable source of primary historical evidence. Among other important roles their information gathering provides support for civil society and their very existence is an emblem of the crucial importance of the freedoms of information and expression to a democratic society. It is no accident that they are often referred to as the Fourth Estate. Titles that have a reputation for the quality of their reportage are assigned long-term status as 'newspapers of record'. Others might have a distinctive role to play at specific historical periods because of the nature of their sources. For instance, certain progressive South African newspapers had particularly close links with the Mass Democratic Movement during the terminal years of apartheid. Newspapers can thus be viewed as both an academic tool and a civil society resource. Their indexing might accordingly span particular historical periods or be current, depending upon circumstances.

One of the world's most comprehensive newspaper indexes is that of the London newspaper, *The Times*, whose scope and presentation provide a benchmark for all other endeavours in the field. The 2002 edition runs to over 1 500 closely printed pages and its content reflects the *Sunday Times* as well as the well-known supplements such as the *Times Literary Supplement*. Because of its pre-eminent status, reference will be made to the indexing practice of *The Times* in this contribution.

Indexing Features

Perhaps the most challenging feature of newspapers is that 'there is no standard way to index' them (Beare 1999:24). They are documents that reflect the societies in which they are published and their indexes must 'fit the time, the place and the occasion' (Friedman 1942:23). A true index to newspaper articles is a complex matter of detail and precision

(Semonche 1986:27): *The Times* arranges entries chronologically, giving the page number and column (a-h), plus an indication of short (s) articles with a column length less than 50 centimetres and the presence of photographs, maps and charts. Most non-commercial projects should more accurately be described as selective subject indexes.

The indexing of newspapers, while a relatively common activity, has a number of features that pose a distinctive challenge to the indexer. Before starting a project it is important to establish broad parameters. These will depend on two main considerations: the probable needs of the users for whom the index is being compiled, and the time and resources available to the indexer. For these reasons very few newspapers will be indexed in their entirety, making this an exercise completely distinct from, for example, the indexing of a book where every part of the text (and sometimes even footnotes and endnotes) is taken into consideration. Selectivity and the initial decision about what to omit are crucial (Sandlin, Schlessinger & Schlessinger 1985:186). For instance, a typical policy would be to restrict indexing to the news content only, ignoring everything else. On the other hand, a retrospective project might conceivably involve the indexing of advertisements and the births, marriages and deaths columns for the value of their historical evidence. Such decisions need to be made at the outset: backtracking can be a costly exercise. For this reason a pilot index is probably a sensible option, if feasible.

Another feature of current newspaper indexing that sets it apart from other genres is the fact that the indexer is dealing with an evolving story, sometimes spanning a lengthy period of time. At the outset it is often not possible to isolate the key concepts that will provide the crucial descriptors (Coates 1983:184; Kyte 1967:127). Sometimes a retrospective view will clarify such matters, but in other instances even time will be of no assistance and the story will fade into obscurity. What exactly, to use a South African example, was the McBride affair of 1998 about? Was his arrest and detention in Mozambique a story about a maverick government official; relations between two sovereign states; or dirty tricks by remnants of the old regime? A more recent example, concerning events around the former Director of Public Prosecutions, Bulelani Ngcuka, raises comparable questions about infighting among ANC members, corruption around the arms deal, or the settling of apartheid-era scores. In both cases the indexer may have little option but to use descriptors based on individual and corporate names. South African stories that originally appear to be about corruption often turn out to have other dimensions.

Guidelines

The golden rule of any indexing is to rely on a thorough reading of the text, but with newspapers there is a strong temptation to be influenced by headlines. These are designed to be eye-catching for the reader rather than an accurate reflection of content and are not to be relied upon on their own, although they may be useful as indicators. As Ahmed (1991:257) emphasises, the indexer depends on content plus background knowledge to identify the main significance of a story. The good newspaper indexer needs to be well informed, a quality that is of course reinforced and enhanced by newspaper indexing in a self-reinforcing process.

Newspaper indexers find that in order to avoid over-indexing (Beare 1989:229) it is sensible to apply a rule of thumb regarding the number of descriptors that might be applied to any one article. Some will be adequately covered by one; others may invite many. It is useful practice to regard the first descriptor assigned as covering the main theme of the article, with up to three or four others supplementing it. It is doubtful if a standard length article would require more than five descriptors (*The Times* uses a maximum of four, as specific as possible). Apart from keeping their numbers within realistic limits, it is essential to maintain consistency from issue to issue (Perica 1975:3), remembering that the indexer is involved in an evolving exercise, not a finite text. Although it is possible to use a standard, published general list of descriptors as a basis for indexing, the indexer will in all likelihood develop a thesaurus of her or his own in due course. A long-term project indexing the *Mail & Guardian (M&G Index)* of Johannesburg unexpectedly led to compilation of just such a thesaurus that has been used to describe other types of published material about South Africa held in libraries (Merrett 2000:73). But with the passage of time it will inevitably be necessary to engage in a certain amount of retrospection and, if necessary, adjustment (Knee 1982:101). Newspapers tend to have a primary geographical context within which they work and this can become the default for the descriptors: *The Times* presumes that the country is Britain, unless otherwise stated.

Given that a newspaper has the potential to throw up many indexable personal and collective or corporate names, clear guidelines have to be established. Names should generally only be used when they are clearly the primary focus of an article (although letters to *The Times* are indexed under both the writer and their subjects). In general the index user is far better served by an emphasis on concepts. An interesting exception was in fact provided by the *M&G Index* already mentioned: when it was started, under conditions of considerable repression, it was important to use the names of organisations in order to provide access to their otherwise censored opinions and policies. But as democracy asserted itself, so it was possible to change to an indexing practice that emphasises concepts. This helps to maintain long-term indexing consistency (Einhorn 1976:2-3).

Another important consideration lies in the construction of descriptors. Natural language is preferable for the sake of the user: Traditional healers is more straightforward a term than Healers, traditional – which will inevitably require a *see* reference. But there will be cases where the grouping of headings is useful (Christie 1986:92). In the *M&G Index*, whose main focus is the political, social and economic condition of South Africa, the following collective headings are used: Broadcasting; Children; Churches; Courts; Farms; Schools; Taxes; Violence; Women; and Workers. ‘Obituaries’ is also a collective descriptor, but individual names are indexed as well. *The Times* is extremely sparing with collective entries and limits them, surprisingly perhaps, to leading articles, law reports, obituaries and editorial cartoons. Grouping is not to be confused with subdivision, which is possible with any heading for the sake of clarity and economy of space. For instance:

Freedom of association of expression of the press
--

Cross-references (*see* and *see also* references) should be used with intelligent and sparing anticipation and chosen for their potential usefulness. The most readily understood alphabetical order is word by word (practice at *The Times*).

Using natural language consistently with a majority of direct descriptors and a modicum that is collective or grouped will create a long-term structure or overview of a newspaper that gives it added identity (Dewe 1972:58). All indexers create a resource that is greater than the sum of its parts. By its very nature a well-structured index will stimulate creative research, using newspapers by highlighting prominent topics or even encouraging serendipity.

Online Developments

Most major newspapers can now be consulted online, some by using sophisticated search programs. The ability to scour enormous volumes of text by keyword suggests that old-fashioned indexing is now redundant. Under certain circumstances this might be true. But while recall potential will inevitably be high, precision is another matter. To take an obvious example, the search term 'Mandela' will score a multitude of hits in any South African newspaper database: by searching the *M&G index* online for the 1999 issues, 222 hits were derived, but in the opinion of the searcher only three of these were of major significance (Merrett 2000:74). The search itself will not reveal which are the particularly significant hits. Human agency in the form of the indexer is alone responsible for this. Such a view is forcefully put by Steemson (1994:21) writing about the *Express Newspapers* archive in London:

We chose human brainpower for entering index references rather than the cheaper option of full-text automation. No full-text system invented can emulate the trained selectivity of the human mind, or the creative intuition of an experienced librarian.

Conclusion

Of course many people still do not have access to online search facilities, nor are these necessarily quicker to use than a well-constructed manual index. The manual index will undoubtedly be more adept at picking up and highlighting significant articles and key information: indexing cannot be reduced to a mechanical exercise. One of the reasons for this is that descriptors often need to be contextualised.

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Abstract

The chapter commences with definitions of the closely related disciplines of politics and international relations, prior to focusing on their unique features and indexing characteristics. Guidelines demonstrate concrete methods of approaching the indexing tasks. These are illustrated by many practical examples. Two case studies of libraries relevant to the topic provide an insight into the practical problems encountered.

Introduction

The dynamics of both politics and international relations are twofold. On the one hand, they are driven by the regularity of G8 summit meetings or elections at five-yearly intervals, to quote some obvious examples. On the other hand they are subject to the contingencies of the spontaneous, the unknown or the unexpected. Although the United States was fully aware of the possibility of terrorist attacks, who could have predicted the 9/11 attack on the Twin Towers and the Pentagon? The implications have changed the face of both politics and international relations forever. It is the role of the indexer to document these occurrences in a way that facilitates the quick and easy retrieval of pertinent information.

The study of politics and the relatively new discipline of international relations falls firmly into the social science discipline. The former has been defined as ‘the science or study of government, and the interaction of political forces, with reference to its principles, aims, methods and conduct’ (Comfort 1995:464). This rather bald definition could be amplified by an explanation devised by Benyon and Jeffery (2000:1) in a lecture celebrating the first 50 years of the Political Science Association in Great Britain and excerpted below:

So what is it that links the diverse subject matter of political studies, and why should we explore it? One definition is that it is “an activity which involves conflict and disagreement over ideas and interests and its resolution through co-operation, compromise or coercion, and as such it entails institutions, rules and procedures”. More brutally, perhaps, it has been called “a strife of interests masquerading as a contest of principles”. There is also an important role for political studies in the current debate about the relationship between citizens and the state. At the same time, the demands for, and impact of, research by politics academics has grown greatly... New ideas and perspectives have been opened up in fields as crucial as the post-Cold War era, local governance, and constitutional reform. Governments

have been engaged both in designing the apparatus for new institutions and electoral systems, and in evaluating their operation.

These sentiments could well be applied to the Southern African region since they indicate the emergence of new concepts as the political landscape changes and evolves. For the purposes of this chapter, only one area of politics has been selected in order to clarify indexing techniques.

Politics

Elections have been chosen as they constitute a specialised branch of politics; and indeed there are libraries both in South Africa and abroad devoted solely to the topic. Elections have been described as the 'actual process of choice, comprising the campaign, the count, and the declaration'. To Stanley Baldwin (Comfort 1995:177) they were a regrettable necessity: 'I hate elections but you have to have them. They are medicine.' Love them or hate them, transparent and credible elections have become the benchmark of democracy and their execution and evaluation have become a highly complex activity in determining whether the government stays in office in the main house of the legislature or is replaced by a new administration led by a different party. The models of electoral systems, electoral administration, legislation, the logistics of the polling day and observation all constitute vital elements in the successful operation of an election and this is reflected in the indexing of the material both surrounding and emanating from them.

International Relations

The Penguin dictionary of international relations defines it as follows: 'The term ... is used to identify all interactions between state-based actors across state boundaries' (Evans & Newnham 1998:274). International economic relations, international politics and international law are related fields but the methodology differs because that of international relations is eclectic, utilising methods of study from various fields. The discipline of international relations is a multidisciplinary and heterogeneous field of study related to those mentioned above. Although previously studied within the parameters of history and politics, it was given formal recognition in 1919 when the first chair was established at the University of Wales, Aberystwyth.

As such, these fields of study should be relatively easy to index because one would apply the well-defined indexing rules; however their unique characteristics make these subjects rather more challenging than one would expect.

Unique Features

- Both politics and international relations are policy oriented.
- Theoretical directions include the concepts of idealism, and have expressed a belief in progress towards a fundamentally peaceful and just world order.

- Subsequent theoretical trends have been, in approximate chronological order, realism, behaviouralism, neorealism, neoliberalism, world systems theory, critical theory and postmodernism. In the years following World War II, political scientists and scholars of international relations increasingly turned to the methods and premises of scientific enquiry. Analysts were more inclined to study recurring patterns in world politics rather than a single event as a focus of enquiry.
- New theoretical models will no doubt be forthcoming in the future.
- It is now widely accepted that, given the range and complexity of the subject matter, a wide variety of theoretical approaches might be regarded as an asset rather than a liability.

Indexing Rules

The above unique features of the disciplines should be taken into consideration when designing the following rules for the indexing of both politics and international relations texts.

Use a Thesaurus

Both subjects rely heavily on a thesaurus for the key elements of using indexing terms. However, flexibility in the form of free language becomes an essential component in the indexing approach, as will be seen later. For example:

Electoral Legislation could be found under Electoral Acts; Elections Legislation; Legislation
Legislation and so would have to be standardised by the use of controlled language.

Use a Keyword System

International Relations in particular focuses on relations between states; therefore a largely country-based or region-based keyword system seems the most appropriate approach. A distinction should be made between foreign relations and foreign policy. Whereas foreign relations implies bilateral or multilateral ties, foreign policy should only be indexed under the country which is applying the policy. For example:

SOUTH AFRICA
Foreign relations
(with) Nigeria
And:
NIGERIA
Foreign relations
(with) South Africa
But:
UNITED STATES
Foreign policy
(towards) Israel

However, this rule should not be applied too rigidly, since international issues such as globalisation, nuclear questions and environmental matters increasingly dominate world politics, often requiring main keywords. For example:

GLOBALISATION
Third World stance

Index under Individual Approaches

The variety of theoretical approaches, models and schools of thought should be reflected in indexes focusing on both politics and international relations. Whereas it is possible to combine these texts under one heading, it seems to be more appropriate to index under the individual approaches. For example:

INTERNATIONAL RELATIONS
Theory
And:
POSTMODERNISM

POLITICS
Theory
And:
REALISM

Use New Keywords

Current developments in the political and international arena occur constantly, and unexpected events suddenly dominate national politics and relations between states, and influence their policies. Examples of these would be the events of 11 September 2001 or the assassination of Sheik Ahmed Yassin by Israel. New keywords have to be devised and standardised. For example:

UNITED STATES
World Trade Centre attack
11 September 2001
And:
UNITED STATES
World Trade Centre attack
11 September 2001
impact on Africa

Adopt a Neutral Stance

A neutral stance has to be maintained, differing in this respect from disciplines such as the natural and exact sciences, where objective indexing is easily achieved due to the nature of

the subjects. As social science disciplines, politics and international relations often focus on conflicting ideologies, belligerent actions and violations of the international code of conduct. The indexer should use terminology which is restrained and objective, without compromising accuracy. Two examples follow:

MIDDLE EAST
 Conflict
 Suicide bombers
Rather than:
 MIDDLE EAST
 Terrorism
 Suicide bombers
 or
 SOUTH AFRICA
 Anti-apartheid organisations
Rather than:
 SOUTH AFRICA
 Terrorists

Use Cross-references

Cross-references should be liberally applied. Countries, provinces and cities are occasionally renamed, and the titles of regimes, political parties, regional and international organisations are always changing. Acronyms should also be cross-referenced. Multifaceted issues should be approached from various angles, such as the attack on the World Trade Centre.

Examples:

BURMA
See also:
 MYANMAR

NEW PARTNERSHIP FOR AFRICAN DEVELOPMENT
See:
 NEPAD

WORLD TRADE CENTRE
 Attack
See:
 UNITED STATES
 World Trade Centre attack

11 SEPTEMBER 2001
See:
 UNITED STATES
 World Trade Centre attack

Incorporate Dates

Dates are often the only distinguishing feature between recurring events and should be incorporated. Coup d'états, elections and conferences should be dated. Examples:

MALAWI
Elections 1999
Elections 2002

And:

UNITED NATIONS CONFERENCE ON SUSTAINABLE DEVELOPMENT
Johannesburg, 2002

Indexing Guidelines

- Indexing of theoretical material can be standardised, as these frameworks are developed over time, and even new trends become familiar, for example the trend of postmodernism.
- The same is true of recurring themes – long-term structures result in the developments of a consistent and well-designed indexing terminology, including the appropriate cross-references. The construction of an in-house thesaurus, to ensure consistency, is recommended.
- The indexing of unique and single events appears to pose greater challenges and require care and circumspection. As such developments often result in a string of further events, for example Fall of the Berlin Wall – end of Communism in the Democratic Republic of Germany – a united free Germany. The sequence should be apparent in the construction of an index.
- Both politics and international relations are to a large extent dependent on individual personalities; therefore biographical documentation of participants abound. Information on personalities should be indexed to include distinguishing features which will prevent confusion at a later stage, for example George Bush Snr and George Bush Jnr, both presidents of the United States, should be distinguished by their dates of birth and/or their full second names.

Brief Histories of Two Libraries

Within the Southern African region, two specialised libraries are synonymous with resources on International Relations and Elections. These are the Jan Smuts House Library of the South African Institute of International Affairs (SAIIA) and the EISA Library (EISA was formerly known as the Electoral Institute of Southern Africa), both of which are situated in Johannesburg, South Africa. The former has regional offices in the Democratic Republic of Congo and Mozambique with a third to be opened in Angola.

Jan Smuts House Library

Initially a card catalogue was established (1976), using a country-based keyword system as it was the most practical method to retrieve information. It includes periodical titles, volume and issue numbers, dates and pagination only – neither authors nor titles of the articles were included due to space and time considerations.

Fifteen years later, the Q and A system was introduced as the library's entry into the electronic era. Within a few years, this system had also become obsolete. Since it was necessary to use software with other library functions, such as periodicals cataloguing, archives recording and book ordering, an InMagic package was installed. In 2004, it totalled some 15 000 individual headings and more than 100 000 entries.

The indexing of periodicals in this manner has served the International Relations community and related fields for nearly 30 years. It has ensured effective and specific information retrieval in a world now dominated by the Internet.

The EISA Library

This library was established to develop and sustain an integrated information and research service on election-related issues and democratic transitions in the SADC region. This objective has now been extended to include the entire African continent and beyond, hence the name change.

Indexing was initially nonexistent, as the library consisted mainly of unprocessed material, housed in a series of boxes. An in-house software program was developed, based on experience gained in the Jan Smuts House Library.

Unlike the Jan Smuts House Library, however, it includes a full reference citation, annotation and a multitude of keywords that comply with the specially constructed thesaurus. This ensures precise information retrieval without excessive cross-referencing.

Conclusion

As can be seen from the above, the indexing of material on politics and international relations is an intertwined activity, illustrating both the internal and external elements of the disciplines. In the main, indexing is relatively straightforward; consistency is of paramount importance – as is the ability to adapt to the ever-changing political landscape. Without detailed and meticulous indexing, given the burgeoning literature on the subjects, it would be virtually impossible to present the timeous and precise information needed by scholars, researchers and practitioners.

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In-Text Citations

The theory of international relations is a complex one, and it is not possible to do justice to it in a single chapter. However, the following are some of the key concepts and theories that have shaped the field.

Realism is the dominant paradigm in international relations, and it is based on the idea of power. Realists believe that states are the primary actors in international relations, and they are driven by the desire to maximize their power. Realism is often associated with the work of scholars such as Henry Kissinger and Kenneth Waltz.

Liberalism is another major paradigm in international relations, and it is based on the idea of cooperation. Liberals believe that states can work together to solve problems and promote peace. Liberalism is often associated with the work of scholars such as Immanuel Kant and David Held.

Constructivism is a more recent paradigm in international relations, and it is based on the idea of social construction. Constructivists believe that international relations are shaped by social norms and structures. Constructivism is often associated with the work of scholars such as Alexander Wendt and John Ruggie.

Conclusion

The study of international relations is a complex and ever-evolving field. It is important to understand the different paradigms and theories that have shaped the field, as well as the key concepts and actors that are central to the study.

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TRAINING OPPORTUNITIES

Marlene Burger

Part Four

TRAINING

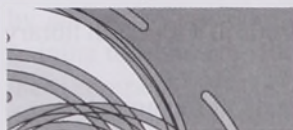
Introduction

...of following and reflecting can be a satisfying way, allowing practitioners to develop insight into their own and their students' psychological experiences. This can be taught through the study of literature, self-reflection, and by modeling the standards of self-reflection and self-awareness in the classroom. An interesting and stimulating subject to explore is the role of the professional practitioner in education and how this role can be enhanced through the study of literature and self-reflection.

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31 TRAINING OPPORTUNITIES



Marlene Burger

Abstract

Indexers need a good general education, advanced subject knowledge, and specialised acumen around indexes and indexing. Whenever possible, these general educational requirements should be met while still at college, technikon or university and before employment. Indexing skills are taught both at university and by indexing organisations. In general, indexing often forms part of a degree programme in Information Science. Formal education and training of abstractors is seldom offered. In this chapter, education and training opportunities are assessed for indexers and abstractors in Southern Africa. Suggestions and arguments offered by Fourie (2000; 2002) and Theron (2003) are incorporated in this chapter.

Introduction

A career in indexing and abstracting can be a satisfying one, allowing practitioners to develop unique skills and to work in an intellectually challenging environment. These skills can be acquired by formal education, self-education, and by training in the workplace. Formal education may comprise courses or modules on indexing and abstracting offered at universities, or short courses offered by professional associations or individuals. Self-education is accomplished by studying books and manuals in the field.

Training in the workplace is valuable in the sense that very few librarians or information science graduates enter the profession with the explicit aim of becoming an indexer or abstractor. Courses forming part of a degree programme provide limited hands-on experience for students. A great deal of indexing and abstracting experience is needed for full professional development. Short courses, continuing education courses, and workshops give a quick introduction to the fundamentals of indexing and abstracting, followed by a range of practical exercises. Distance teaching programmes can offer working adults valuable opportunities to further their careers in a dynamic indexing and abstracting environment that includes database indexing, book indexing, periodical indexing, web indexing and thesaurus construction.

People who enter the indexing and abstracting field come from many fields, and may be writers, editors, researchers, lecturers, housewives or librarians. Some make a full-time career of it, while others use indexing and abstracting to supplement their incomes. Cleveland and Cleveland (2001:243) list five areas where indexers and abstractors may find work. In the list below these areas are marked with an asterisk (*); the others were added by the author of this chapter:

- *freelance book indexing
- *indexing for independent information brokers, who often use indexers, either on their staff, or on an assignment basis
- *working as library staff members, either indexing special materials in a research library or in a wide range of special libraries
- *working for primary information publishers of scholarly journals, for example
- *working for secondary information publishers, for example in indexing and abstracting services
- working in archives and museums
- working on bibliographic databases and networks, the Internet and the World Wide Web
- working on private large collections in private homes (e.g. Africana, music, photographic items)

Succeeding as a freelance indexer entails more than just being a good indexer. Freelance indexers have to set up a small business enterprise. The advantage of this is the independence of working for oneself. The disadvantage is that there are no guarantees of a steady income and job security. Disciplined work habits and business skills are prerequisites. The most important feature is to promote oneself. A major key to successful freelancing is to be able to sell one's services and convince authors and publishers of the need for indexers. Marketing could aimed at commercial publishers, professional associations, academics, libraries and the like.

The traditional publishing world will continue to need indexers and will remain a source of work, but there are other options – the electronic world of the Internet offers indexing opportunities in hypermedia indexing, electronic publishing and image databases. There is a demand for indexers in contemporary society. De Robbio and Marini (2003:1) have the following to say: '[I]n the ever more pervasive and connected world of digital information, reliable connections among such knowledge representation and lexical, as well as IR, tools such as classifications, lists of subject headings, thesauri, terminological collections and ontologies, are a necessity for networked knowledge-based activities. Users in different settings and with different demands and expectations want to fulfil their information demands wherever information is available, ... , regardless of the heterogeneity of sources'. The more-than 800 000 000 web pages available on the Internet (IMLS 2003) plus all the other published resources and the contents of archives and museums – all this illustrates the enormity of the task awaiting indexers. There is indeed a need for well-educated and trained indexers, as illustrated by the demand for their services. For Southern Africa to become competitive in the international arena, access to information or information-for-action is very important.

The tasks of conceptual analysis and translation of concepts into the indexing language of the system used are based on a large field of theory, for instance the theory of knowledge creation, its existence, storage, retrieval and use (epistemology, ontology, etc.). To be a competent indexer thus requires a sound theoretical schooling. In the present technologically obsessed society, knowledge of technology, entrepreneurial skills, human resources and office management is vital.

Competencies

Various lists of competencies that successful indexers should possess have been compiled by authors of leading indexing manuals. Such lists are not recipes for the education and training of indexers – they are rather wish lists or ideal visions. It is important to note that these competencies could be taught by various education methods such as formal, informal or in-service education and training. This education can be provided by many different types of educators and trainers such as universities, professional societies, and employers. The following is a list of competencies derived from the subject literature and the author's own experience (Theron and Davies list these competencies in chapter 2, but perhaps it is a good idea to repeat them in this the last chapter):

- A good general education in information science, which can also include librarianship, archival science, museum science, publishing and/or any other academic subject(s).
- A sound understanding of knowledge and related concepts such as data and information, for example how information and knowledge are generated, produced and regulated in society. Other matters may involve the recording, organisation for retrieval of information, the search for and use of information in society.
- A thorough understanding of the theory of indexing, its role in providing access to and communication of information; and a thorough understanding of the links between indexing, classification, the assigning of subject headings and thesaurus descriptors.
- Language skills such as semantics and syntax.
- Ability to differentiate between types of indexes such as catalogues, book indexes, databases, manual and automated indexes, and indexes to the Internet. Knowledge of indexes to electronic records is becoming increasingly important.
- Knowledge of information in all forms and formats such as books, pictures, periodicals, museum objects, CD-ROMs, technical reports, newspapers, and posters (i.e. ability to answer the question 'What can be indexed?').
- A proper understanding of the indexing process, that is conceptual analysis and translation. Indexers should be able to apply their knowledge and successfully complete a number of different indexes, for example to books and electronic records. They should also demonstrate an understanding of and ability to use manual and automated (or electronic) indexing methods and systems of indexing.
- Editing and proofreading skills needed for the technical presentation of an index.
- A qualified indexer should be able to undertake user studies, to evaluate indexes and indexing systems, to be able to select appropriate indexing systems or indexes to modify and improve existing ones in accordance with user needs and requirements.
- An understanding of the role and use of technology in indexing, including computers, telecommunications and the requirements of the digital library represents essential abilities for a successful indexer in the digital age.

- The completion of a practical component (especially where formal education is concerned) in the form of an internship, practical sessions at book publishers or Internet providers, et cetera. Ability to compile different kinds of indexes may also be required and can be a valid learning outcome.
- Entrepreneurship, especially for freelance indexers – quoting prices for indexes marketing their services, knowledge of accounting, budgeting, time and stress management, human resource management, office technology and administration, all comprise valuable skills that should be included in indexing curricula.
- Indexers (including prospective indexers) should also be taught professional and ethical conduct as well as the distinctive characteristics of a profession. These include issues such as service orientation, punctuality, confidentiality, ability to recognise, and acknowledge to clients, that a certain kind of index may be impossible to compile, and ability to handle a clash of interests. Although these issues may be considered peripheral, they are important to the survival of a professional indexer.
- Prospective indexers should also be made aware of the importance of continuing professional education and lifelong learning.

The obvious question now is 'How can all this be achieved?'. How can ideals be turned into reality within the constraints of Southern Africa's education and financial environments?

Short Courses and Workshops (Informal Education and Training)

At present, the Association of Southern African Indexers and Bibliographers (ASAIB) offers workshops in book indexing, periodical indexing (both manual and embedded indexing), and abstracting and reference techniques (bibliography). ASAIB plans to expand these workshops to include thesaurus construction and web indexing. The necessity for these workshops arose from the need for hands-on training in indexing and abstracting that covers a wider field than formal information science teaching programmes.

The indexing workshops are based on the BS ISO 999 (see the bibliography) and include editing, proofreading and guidelines on how to approach freelance indexing. Many indexing manuals have been studied in order to compile the course content (some of the most prominent ones are listed in the bibliography). The workshops are constantly adapted to keep track of developments in the field. ASAIB also maintains a directory of available indexers with their specific subject areas/specialisations indicated. The directory is available on the ASAIB website: www.asaib.org.za

A typical workshop may cover the following topics:

- definitions of core concepts
- characteristics of an indexer/abstractor
- conceptual analysis
- function of an index/abstract

- types of index/abstract
- indexing/abstracting principles
- decisions to make about the planned index/abstract (including policy)
- terminology
- formulating entries
- arrangement and presentation
- copy preparation
- editing
- proofreading
- index/abstract evaluation
- guidelines for freelance indexing/abstracting
- personal relationships

Throughout the workshops, participants work on a variety of exercises. There are also opportunities to evaluate one another's indexes or abstracts. Workshops in embedded indexing include the basic principles of indexing as set out above. However, a good working knowledge of either MSWord or WordPerfect is a prerequisite for enrolment in these workshops. ASAIB presents workshops in Pretoria, Cape Town and Durban in cooperation with the ASAIB Western Cape Branch and the ASAIB KwaZulu-Natal Branch. The workshops are open to any practising or prospective indexer/abstractor. Certificates are issued to participants. Because of the costs involved, ASAIB cannot as yet offer training via the Internet. However, the current Executive Committee of ASAIB is looking into this matter.

The ideal would be for ASAIB to act as the accrediting agency for indexers in Southern Africa. This would involve keeping a register of accredited indexers. Accreditation would require successful completion of an ASAIB training programme, with assessment of practical tasks and a written test. ASAIB may also set the standards for education and training programmes offered by teaching institutions. But this will take a long time to achieve, for the following reasons:

- Need to meet specific requirements regarding South African teaching programmes, such as those of the National Qualifications Framework (NQF), the South African Qualifications Authority (SAQA), the Skills Development Act, the Sectoral Education and Training Authority (SETA) and recognition of prior learning (RPL) requirements. No teaching programme (with a formal qualification as outcome) can be implemented without the approval of these bodies.
- Some programmes (which include indexing and abstracting modules) may already have been approved by these organisations, but the task of ASAIB is then to determine whether those modules comply with the standards envisioned for accreditation purposes.
- Collaboration with teaching organisations, expert indexers, abstractors and bibliographers, the publishing industry and overseas indexing societies will be of paramount importance. ASAIB has to ensure that the standards of its teaching programme compare with those of overseas indexing societies.

- The last survey of training in indexing in South Africa was Pienaar's in 1998. A new, in-depth survey will have to be undertaken, including the whole of Southern Africa.
- Employers of indexers, abstractors and bibliographers in Southern Africa will need to recognise ASAIB's accreditation. This will call for an extensive marketing campaign.
- An option is to franchise the training programme of the Society of Indexers for example, but there are problems such as its British bias and the time and effort that would be involved in adapting the programme for Southern African purposes, as well as the cost.

ASAIB is considering all the possible options for achieving accreditation.

Distance Education (Formal or Informal)

Indexing and abstracting are both complex processes involving higher order cognitive skills. They require considerable practice, considerable reflection, and for learner indexers/abstractors to be critical of the quality of their own work. Not only are learner indexers/abstractors required to apply the guidelines and rules as explained in standards and textbooks, but they are also required to perform conceptual analysis to identify key concepts. This is a difficult process that can leave the novice indexer/abstractor feeling some uncertainty. It is also important for indexers and abstractors to be aware of diverse information needs and to react accordingly. Indexing and abstracting are furthermore subjective rather than objective processes, which means a single individual may, for example, assign different indexing terms at different times to the same text, or more than one individual may assign different terms to the same text. Although both can be conducted as paper-based exercises, they can also be done electronically.

The teaching of indexing and abstracting therefore poses a number of challenges, especially as they are also marked by new developments such as changes in indexing software, and the demands of a variety of indexing and abstracting types (e.g. web indexing, critical and structured abstracts). Although many standards and textbooks (e.g. Booth 2001; Borko & Bernier 1978; Cleveland & Cleveland 2001; Lancaster 1998; Mulvany 1994) offer advice on the steps and principles to consider for both indexing and abstracting, the main problem lies in the application of these skills, for example having to decide what an entity is about and representing it in vocabulary that will meet users' needs and support IR.

Apart from practical skills there is also a need for more intensive research in indexing and abstracting. Anderson (1994) remarks: '[T]here is so little research and so much ignorance about indexing, especially on how people use indexes, and what constitutes good and useful indexing', while Millstead (1994) declares: 'People have been making indexes for hundreds of years, but there has been relatively little research on indexing as such.' Since 1994 (when these sources were compiled) the scene has changed somewhat, with the focus rather on organisation of multimedia, visual presentations of information organisation, use of thesauri, natural language and information organisation in digital libraries, rather than on cognitive (thinking) skills.

The essence of distance education lies in the geographic separation between trainer and learner, and the fact that they are not in the same place at the same time. Learners are

seldom in the position where they can ask questions and get immediate, direct answers from the trainer, except when video conferencing or web-based bulletin boards are used.

Distance teaching has both advantages and disadvantages for the training of indexers and abstractors. The following are some of the advantages: trainees can carry on with their jobs and family responsibilities; trainers and trainees can stay in remote areas; geographical distance does not keep people from furthering their careers; trainees can study at their own pace; trainees can study at times which they find convenient (the same applies to the trainers developing the course content); fees are normally cheaper and there are no, or few, travelling expenses; one can use expertise from all over the world to help develop course content and to do assessment; a variety of teaching methods can be used, selected and combined according to the needs of the trainees; one can cater for individual differences; training can be offered to people who otherwise could not afford formal training or attend workshops.

Disadvantages include the following: it is not easy to teach basic technical skills (e.g. using a computer); trainees must have good reading and writing skills, and a strong sense of self-discipline and responsibility; sometimes restrictions are imposed, for example dates for tests (however in some distance teaching programmes learners can be tested whenever they are ready and write tests online); one needs to assume all possible scenarios for the learners, their experiences and potential questions (probably without ever meeting them); there is seldom direct synchronous communication between learners and trainers (learners may feel isolated); they must not only have access to the appropriate IT infrastructures, but must also be familiar with the IT that will be used; developing and maintaining distance teaching material is very time-intensive and labour-intensive. There should also be opportunities for learners to assess their own progress, answers for self-assessment exercises and other activities should be provided, with a wide variety of examples from the real (indexing and abstracting) world.

Instructional Design

The planning of a distance teaching programme is influenced by three key needs:

- need to understand the concepts of indexing and abstracting, the practice and theory of these concepts, and developments and research findings
- need to interpret the changing indexing and abstracting environment and to develop lifelong skills
- need to understand and interpret the concept of distance teaching, and the potential value of distance teaching for the training of indexers and abstractors

The way training is planned is also influenced by the view on teaching and training, and of the people trained. This is one reason why there are so many different approaches to training indexers. Philosophy of teaching can also be called the epistemology of teaching. Is training merely the provision of training materials, or does it include offering examples and practical exercises, and does it include feedback and assessment? Furthermore, does it perhaps include extensive support and enrichment?

Instructional design should be the point of departure when considering the possibilities for the distance teaching of indexers and abstractors. The key principles of instructional design also apply to the design of practical workshops for indexing and abstracting. When making the final decisions on how to deliver the programme (e.g. through print-based training material or through the WWW), one should also consider the characteristics of distance teaching and its specific requirements and challenges.

Instructional design can be described as a logical, step-by-step approach to the planning of training programmes. It helps one consider everything that may have a bearing on the training. Seels (1995:xi-xii) says: '[It is] the process of specifying conditions of learning. Its purpose is to create strategies and products on the macro level, such as programs and curricula, and at the micro level, such as lessons and modules.' It is most often guided by a model of instructional design – many models can be found in the subject literature (e.g. Dick & Carey 1996; Kemp, Morrison & Ross 1998). These models can be adapted according to one's personal preferences and circumstances. The model depicted below is an adaptation of a model presented by Ina Fourie in 1995:

An instructional design model will help one to determine *inter alia*

- for whom the training programme will be developed (e.g. Library and Information Science [LIS] students, novices or experienced indexers and abstractors)
- what one wants the learners to learn or demonstrate, that is what they should be able to do after completing the training programme
- the best way to learn the subject content or skill
- the best way to offer the programme (e.g. through print or online)
- the extent to which the learning has been achieved (the assessment procedure)

Steps	Questions to answer
Situation analysis	Why is training necessary? What is the indexing and abstracting environment like? Who will be trained? Who will offer the training? What training materials are available? What technology is available? Which factors may impede the training?
Formulation of the aim of the training and the learning outcomes	What will be the aim of the programme? What should the training cover? What will be the learning outcomes, i.e. what should the learners be able to do after completing the training? What should their entry knowledge be? How will the learners be assessed?
Designing of the training material	Which teaching approach will be best? Which teaching methods will be best? Which teaching strategies will work best? Which media will be used to deliver the programme? How will you communicate with the learners? How will you allow for individual preferences and circumstances? How will you allow for the learner's contribution? How will you develop a supportive and stimulating climate?

Steps	Questions to answer
Development of training material	This includes the preparation, duplication and distribution of the material (e.g. workbooks, videos, websites).
Training	This includes marking assignments or portfolios, offering feedback, presenting classes and workshops, answering questions and developing personal rapport with the learners.
Evaluation	This includes the evaluation or assessment of the learners' progress, as well as the evaluation of the success of the training programme.

Situation Analysis

Within the context of a particular environment, a situation analysis should shed light on the decisions to make in the planning of the programme. The indexing and abstracting environments are characterised by change – indexing methods, for example, have changed. The indexing process and therefore also the training of indexers should always be seen as part of the bigger picture. There have also been calls for closer links between the theory and practice of indexing and abstracting and the overall indexing process. Bates (1995), for example, declares: 'Finally indexing and information system design need to proceed within the context of a deep understanding of the character of the intellectual domain, its culture, and its research questions.' Unfortunately there is not always sufficient time to do a formal situation analysis. Even if one has to rely mostly on one's gut feeling and personal perceptions, it is still worthwhile to at least consider the issues forming part of the situation analysis (see table above). The information collected during a situation analysis forms the basis for subsequent decisions. These decisions will also be influenced by one's views and convictions in this regard.

What to Teach

In addition to the components of the situation analysis, it is also necessary to identify learners' needs. This is called a needs assessment. Needs are the gap between what is expected and the existing conditions. In other words, they reflect the gap between the current situation and where one would like learners to be after completing the training programme. The following are examples of needs: indexers requiring training in the use of indexing or thesaurus software, or on how to start an indexing or abstracting business, how to evaluate the effectiveness of an index or database, how to interpret and apply research results in their indexing and abstracting practices, how to use the Internet to keep track of indexing and abstracting developments, or how to analyse a document. A needs assessment can be done by means of questionnaires, interviews, brainstorming sessions or focus group interviews. Indexing and abstracting standards and textbooks may also offer guidelines. In order to offer dynamic teaching programmes, the processes of indexing and abstracting, specifically the tasks of an indexer/abstractor, should be reassessed.

Task Analysis

The purpose of a task analysis should be to identify one or more of the following indexing and abstracting matters:

- tasks
- methods employed
- cognitive (thinking) skills of experts
- tools used
- order of activities that need to be completed
- relationship between different activities (e.g. conceptual analysis and the selection of terms)
- mental model (framework)

The following are task analysis methods: task descriptions, methods analysis, learning hierarchy (prerequisite analysis), information processing analysis, learning contingency analysis, activity theory and conceptual graph analysis. For more details on these methods, Jonassen, Tessmer and Hannum (1999) can be consulted. Doing a task analysis will help clarify the complexities of indexing and abstracting. The most difficult part of indexing is not applying rules, such as arranging the entries in alphabetical order, constructing cross-references, or using the plural form for countable nouns: 'Deciding what an entity is about, and how to select the most appropriate indexing terms, are the problematic issues that we still do not know how to teach. How do you teach the skills of conceptual analysis? I believe that task analysis can shed light on this, and it will probably point us in new directions when selecting teaching methods and teaching strategies' (Fourie 2000). The information gained from task analysis can also help one take decisions (e.g. on the theory behind indexing) such as deciding between mission-oriented indexing, request-oriented indexing, subject-oriented indexing and entity-oriented indexing. Is it necessary to offer training in such a way that the learners can experiment with different approaches, learn from their mistakes, and gradually improve the quality of their work?

Teaching Aims and Learning Outcomes

Examples of teaching aims could include the following: to train learners to prepare indexes or abstracts that will support effective information retrieval, to contribute to the knowledge of information retrieval, to keep track of future developments, to analyse specific web-based information systems, to determine the need for web-based indexing, or to decide which vocabularies to use. Learning outcomes should be formulated clearly – it is extremely important for distance learners to know *exactly* where they are heading and what is expected of them.

Different taxonomies can be used to formulate learning outcomes, for example Bloom's taxonomy which is well known and always a safe choice. He distinguishes between the cognitive, psychomotor and affective domains. Knowledge of something represents the most basic level, while evaluation represents the most difficult level of the cognitive domain (Kemp, Morrison & Ross 1998). Examples of applying Bloom's taxonomy include the following: after completing the training the learner should be able to explain the difference

between derived indexing and assigned indexing, analyse a selection of entity types (e.g. a periodical article, a report), assign appropriate indexing terms and write an informative abstract, and critically compare the use of natural language versus controlled vocabulary. When considering the changing indexing environment and the demands made on indexers, it appears that we need a new taxonomy to deal with these challenges. Jonassen and Tessmer have suggested a new taxonomy that seems to have potential for the training of indexers. For details of this taxonomy, consult the book by Jonassen, Tessmer and Hannum (1999).

The following are examples of learning outcomes: after completing the programme, learners should be able to explain core indexing terms and their relationship, evaluate the effect of indexing on an information retrieval system, the impact of their mental models of an information retrieval system on their indexing practice, devise an indexing policy for a specific real-life indexing case study or a proposal for their training needs. As the learners may be adults and experienced indexers and abstractors, one could also allow them to add their own learning outcomes.

Training Programme

In the past, mainly behaviouristic approaches have been used to set teaching objectives. Once learners have mastered an objective, they move on to the next objective. In the dynamic indexing environment, constructivism seems to offer a more viable approach. Here learners are given opportunities to build their own knowledge through personal interpretation. The skills of reflectivity and not just memory or memorisation are emphasised. Constructivism also encourages learners to be more critical about their own work. Although this approach can be used for print-based distance teaching, it is much more effective with online methods where the trainer communicates with learners and learners can communicate with each other. Constructivism seems to offer an ideal teaching approach to the training of indexers and abstractors, since indexing and abstracting can never be perfect. There are also the factors of inter-indexer and intra-indexer inconsistency to consider. Users' needs are also constantly changing. Ongoing self-reflection and improvement are crucial to indexing and abstracting. The constructivist approach allows for such improvement without penalising the learner. However, it does not imply that the final product (e.g. an index or abstract) should be of inferior quality. It is only the *process* of getting there that is made more supportive and more tolerant of the learner's efforts to acquire new knowledge.

Distance teaching can be based on one method (e.g. print-based study guides or manuals) or a combination of methods. The material can be delivered in print-based or electronic format (e.g. web-based instruction or CAI). According to Fourie (2000), the following methods and materials are all suitable for distance teaching:

- Study guides/manuals contain the text with explanations, theoretical background, different viewpoints, and so on, as are normally provided in a lecture.
- Workbooks contain examples, practical exercises and solutions.
- Textbooks offer a wider perspective on problems of and different approaches to indexing/abstracting.

- Videos offer detail on information retrieval (i.e. information searching) and how this can be supported by indexing/abstracting.
- Computer-assisted instruction (CAI) can be used to illustrate the effect of indexing/abstracting on information retrieval and on different points of view on, say, conceptual analysis.
- Discussions can be used to compare different views of indexing/abstracting.
- Case studies may involve working with existing databases, evaluating the indexing/abstracting of a website, or evaluating book indexes or abstracts of periodical articles.
- Expert guest trainers can be used to share different viewpoints (e.g. through a website).
- Mentors can be used to offer on-the-job advice and support.
- Exemplars of databases, indexes and websites used in practice can offer a view on real-life problems.
- Reviews of indexes, for example book indexes, can be used to help learners to refine their indexing skills, and to learn from experts.
- Networking (i.e. interaction with other learners through study groups or web discussions) can be used to stimulate thinking and to collaborate with other learners. It can also be used for peer assessment.
- Supportive tools, for example access to demonstration versions of database or indexing software, online reference works and online thesauri can enrich the learning experience.
- Enrichment can also be offered through links to resources such as websites of indexing societies, e-journals, electronic discussion groups, and publishers and database producers who employ indexers or abstractors.

Most of these methods and materials can also be used in print-based approaches to distance teaching. The most exciting possibilities are with web-based instruction where the study material and learning opportunities can all be available interactively. The choice of an appropriate method or combination of methods will depend on the results of the situation analysis and on the task analysis. One should always use a well-balanced mixture of media.

After deciding on the method or combination of methods to use, a decision must be made on appropriate teaching strategies that will help learners achieve the learning outcomes. A teaching strategy prescribes the sequence of events and offers guidelines on when and how the content should be presented to achieve the learning outcomes. Among other things one has to select strategies that allow for the distance between trainer and learners, individual needs and preferences, support, two-way communication, the contribution adults can make to the learning situation, pre-instructional strategies (e.g. initial motivation, explanation of the aim and learning outcomes, overviews, specification of the entry or prior knowledge level), information presentation, learner participation, et cetera. The teaching strategy should also make allowance for assessment, follow-through activities, collaborative learning, working with real-life, poorly structured problems (e.g. case studies), opportunities for learners to construct their own meaning and to experiment with different solutions and points of view (e.g. by using portfolio assessment and journal writing), collecting information on the learners' experiences, and opportunities to practise and get feedback. Although teaching

strategies should be carefully planned, one should also take care not to go into so much detail that there is no time left to write and construct the actual study material.

Different assessment methods can be used in the training of indexers and abstractors. These include a variety of self-assessment questions and exercises, practical indexing/abstracting exercises and formal tests.

The last steps concern formative and summative evaluations. Formative evaluation is extremely important during the planning stage. One can, for example, get feedback from colleagues and expert indexers/abstractors, as well as from potential learners in the programme. Summative evaluation considers the overall effectiveness of the programme in helping learners achieve the learning outcomes. If necessary, the programme should be adapted or revised.

If distance teaching is preferred, indexers in Southern Africa have to enrol for courses offered by overseas indexing societies such as the British Society of Indexers (SI). Their Distance-Learning Course in Indexing is available on CD-ROM and consists of five units. For enquiries, e-mail can be sent to admin@indexers.org.uk or you can access their website at www.indexers.org.uk Other indexing societies to contact are

- American Society of Indexers (ASI) at info@asindexing.org or www.asindexing.org
- Australian and New Zealand Society of Indexers (ANZSI) at memsec@aussi.org or www.aussi.org
- Indexing and Abstracting Society of Canada (IASC) at www.indexingsociety.ca

Proposed Models for a Training Programme

Theron (2003) suggests two possible models for the training of indexers and abstractors in Southern Africa. However, some issues must be kept in mind before analysing these models: the demographic profile of potential learners (gender, race, place of residence, financial resources and existing educational levels); the requirements of the NQF, SAQA, SETA and RPL; the assumption that there is a need for professional indexers; and what level of education is required. A workshop or brief hands-on course may be sufficient for an experienced indexer/abstractor, especially when it is used as a form of continuous professional education. For a first-level student who has just matriculated, a completely different education model is needed. Such learners may be disadvantaged as far as language skills, general knowledge, reading and comprehension are concerned. Against this background the design of an education model in order to reach the core competencies (as set out earlier in this chapter) becomes quite complicated.

In this model, library schools and information science departments take responsibility for the education and training of indexers and abstractors. Indexing and abstracting form part of the curricula for the professional education of information professionals such as librarians. Often indexing and abstracting is only one section of a major such as subject organisation (including classification, assigning of subject headings, thesaurus construction, etc.) – it is seldom offered as a major on its own. This immediately implies that only the basics are taught with limited practical experience. Even when a practical internship is required from information science students, they rarely get the opportunity to do actual indexing.

The challenge facing library/information science departments is to incorporate more opportunities for practical work (i.e. compiling and evaluating indexes and abstracts). A solution might be Fourie's (2002) socio-cognitive approach (for details read the article listed in the bibliography). The most viable solution seems to lie in brief hands-on courses and workshops supplementing the formal education programmes of teaching institutions. Specialisations can be offered, such as Internet indexing, use of dedicated indexing software such as Macrex or Cindex, embedded indexing, and so on. Employers (e.g. libraries, publishers) can also consider presenting in-service training for employees as part of a staff development programme. ASAIB offers workshops supplementing formal educational programmes for indexers and abstractors.

The second model, the Information Architecture Model, provides an interesting perspective that needs further investigation. Belton (2003:1) describes it as follows: 'Information architecture is currently emerging as a discipline that concerns itself with the development of systematic approaches to the organisation and presentation of on-line information.' This approach places the education and training of indexers and abstractors among that of the other design professions. Most information scientists tend to think of information as content only, and not as something that has a form or architecture. This form, organisation and structure of information comprise the substance of information architecture.

This model has important pedagogical implications for the education and training of indexers and abstractors – it implies that professional education supports the three dimensions of professional attributes, that is the cognitive, the normative and the evaluative. The cognitive dimension is centred on the body of knowledge and techniques needed by a professional to apply his or her work as well as the study and training necessary to master this knowledge; the normative dimension refers to the service orientation of the professional indexer/abstractor and ethical approaches to his or her work; and in the evaluative dimension the differences between a professional's occupation, other types of work or professions and his or her own are constantly compared to emphasise his or her profession's uniqueness, autonomy and prestige. For more information about this model, read the article by Belton listed in the bibliography.

The following are the implications of this model for the education and training of indexers and abstractors:

- Indexers/abstractors must be taught the body of knowledge unique to their profession (e.g. information infrastructure, production and use of information, indexing and abstracting as part of the process, the information environment, research, theory building).
- More emphasis should be placed on the human aspects of indexing/abstracting. Indexes and abstracts are compiled for humans and for use by them. Service orientation and ethics form part of this knowledge.
- A clear conceptual and theoretical grasp of the essence of the profession of the indexer or abstractor is essential. This ensures that indexers or abstractors do not trespass on other professions' domains, and justifies the existence of the indexing/abstracting profession in society.

For training purposes this means that prospective indexers and abstractors need to be exposed to proper theoretical education. This education should include the theory and philosophy of education, information, correct professional conduct, and the nature of the profession.

Conclusion

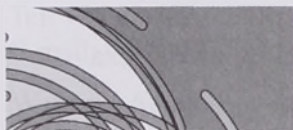
In conclusion it can be stated that the education and training of indexers and abstractors is important, mainly because of their central role in providing access to information. Given the dearth of facilities, this is particularly significant to Southern Africa.

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INDEX



INDEX

Note: Due to a page restriction, a broad, simple index was compiled, mainly based on the headings in the text. In most instances, only names and titles that appear in headings are included in the index. Some entries are combined, for example *abbreviations/acronyms*. It is arranged in word-by-word order, for example *free text* is filed before *freelance indexers*. Prepositions in subheadings are ignored in the alphabetical arrangement. *See* references are used to guide the reader. Since this manual is in essence about indexing, the subheading *indexing* does not appear under all headings. It was also not possible to use subheadings for all headings with several page references.

- abbreviations/acronyms 174, 224, 230-231, 240
- aboutness 20, 21, 33, 112
- abstracting/abstracts 141-158
 - accuracy 153
 - automatic 154-156
 - bibliographic descriptions 149-150
 - comprehensiveness 154
 - critical 143-144
 - definition 141
 - guidelines 149-154
 - indicative 141-142
 - informative 142-143
 - modular 145-147
 - omissions 154
 - organisation policy 44-49
 - reasons for 148
 - signing 154
 - steps 148-149
 - structured 144-145
 - style 150-153
 - training 307-322
 - verbal subject description 57
 - words from 106
- accuracy
 - abstracts 153
- administrative metadata 131
- African Studies* 208
- Africana 197-209
 - archival records 200
 - authority files 208
 - books 198-199
 - Cape Province 200, 201
 - codex records 198-199
 - collections 200-201
 - definitions 197-198
 - ephemera 199-200
 - films 199
 - Free State 201
 - Gauteng 201
 - handwriting 202
 - illustrations 199
 - indexes 201-202
 - indexing problems 202-204
 - indexing resources 201-202
 - KwaZulu-Natal 201
 - language 202, 204
 - manuscripts 200
 - metacodex records 199
 - names for events 203
 - orthography 203-204

- overview 197-198
- periods 198
- personal names 203
- photographs 199
- place names 203
- reference sources 202
- South Africanisms 204
- travelers 199
- types 198-200
- user guide 204
- weights/measures/monetary systems 204
- alphabetical arrangement
 - Khoe-San languages 246-247
 - letter-by-letter 80, 185-186, 259
 - word-by-word 80, 185-186, 259
- alternative press
 - labour 240-241
- analytical chemistry 228-229
- antique maps 210-215
 - care of 211
 - cartographers 213
 - cataloguing 212-214
 - evaluation 211-212
 - management 210-211
 - publication 214
- antonyms 81
- Approved South African Journals* 101
- archival records
 - Africana 200
- archival science 12
- archives 216-220
 - cataloguing 216
 - correspondence 220
 - EAD 217
 - finding aids 134, 216-218
 - Historical Papers* 218
 - indexes 216-217
 - indexing problems 219-220
 - indexing protocols 218
 - overview 216-218
 - photographs 218-219
 - SGML 217
 - standards 217-218
 - TEI 217
 - thesaurus 217
 - William Cullen Library (University of the Witwatersrand) 218
 - WWW 217
- arrangement 79-80, 191-192
 - alphabetical 185-186
 - Khoe-San languages 246-247
 - letter-by-letter 80, 185-186, 259
 - word-by-word 80, 185-186, 259
- ASAIB 6, 42
 - short courses/workshops 310-312
- assigned indexing terms 114
- Association of Southern African Indexers and Bibliographers *see* ASAIB
- audience
 - labour 239
- authoring tools
 - web indexing 119
- authority files
 - Africana indexing 208
 - periodicals indexing 106-107
- authors' keywords
 - periodicals indexing 107
- automatic
 - abstracting 154-156
 - indexing 16, 35, 111-116
- Belkin, N 10-11
- bibliographic descriptions
 - abstracts 149-150
- bibliographic services 252-254
- bibliographies
 - legal 251-252
 - national 285-291
- biological sciences 230-231
 - abbreviations/acronyms 230
 - geographical names 231
 - scientific/popular names 230
 - species/family names 230
- book indexing 68-85
 - alphabetical arrangement 185-186
 - antonyms 81
 - arranging entries 79-80
 - components 71-72
 - cross-references 79, 82, 183
 - definitions of concepts 68-70
 - editing 82, 180-182
 - embedded indexing 86-91
 - entries 76-80
 - errors 182
 - exhaustivity 80-81
 - final index 82-83
 - guidelines 73-74
 - health sciences 234
 - homographs 81
 - how to index a book 72
 - information needed 72-73
 - interpretation 76-77

- introductory notes 72
- layout 186
- letter-by-letter arrangement 185-186
- locators 78-79, 183-184
- main headings 77-78, 81-82, 184-185
- multi-word headings 182-183
- physical entity 75-76
- policy 80-82
- presentation 180-182
- qualifiers 184
- reasons for 70-71
- recording entries 78
- relationships between entries 78
- scattering 182
- singular/plural 82
- software 83-84
- spaces 187
- specific tasks 182-185
- specificity 80-81
- standards 73-74
- steps 74
- studying the physical entity 75-76
- style 76-77
- subheadings 77-78, 81-82
- synonyms 81
- technical presentation 179-188
 - translating the content 76-80
- typestyle 187
- what to index 74-75
- word-by-word arrangement 185-186
- books
 - Africana 198-199
 - indexes to 5-6
 - indexing 68-85
 - literature for children 257-267
- Boolean operators 59-60, 112
- boundaries
 - web indexing 119
- bundling
 - automatic indexing 114
- Business Blue Book of South Africa* 87-91
- Cape Town English Press Index* 5
- cartographers 213
- cataloguing
 - Africana 206
 - antique maps 212-214
 - archives 216
 - museums 268-269
- CD-ROMs 4, 87, 88, 90, 97, 208, 214
- characteristics
 - indexes 30-35, 258-261
 - thesauri 160-163
- chemical names 229
- children's literature *see* literature for children
- CIDOC Guidelines* 270
- classification/coding
 - periodicals indexing 107
- classification notations 54-57
- classification systems 54-55
 - museum objects 277-278
- click sounds
 - Khoe-San languages 245-246
- client services
 - Unisa Law Library 254-255
- codex records 199
- collection-level metadata 130
- collections
 - Africana 200-201
 - antique maps 210-211
 - archives 218
 - health sciences 234
- competencies
 - indexers 14-16, 220, 292-293, 309-310
- components
 - book indexes 71-72
- compound terms 174-175
- comprehensiveness
 - abstracts 154
- computer(s)
 - Khoe-San languages 245-246
 - museums 269
 - national bibliographies 288
 - science 13
 - systems 111-116
- concepts 22
 - book indexing 68-70
 - environmental issues 227
 - expression 34
 - indexing 130
 - metadata 130
- conceptual
 - analysis 9, 20-28
 - approach 88
- conceptualisation 9, 20-28
 - aboutness 21-22
 - complexity 27
 - concepts 22
 - content-oriented approach 24
 - entity representation 21
 - facets 26

- guidelines 22-23
- overview 20-21
- requirements-oriented approach 24-25
- simplistic approach 24
- socio-cognitive view 25-26
 - views on 23-27
- content-bearing words 33
- content metadata 131
- content-oriented approach
 - conceptualisation 24
- context
 - indexing 7-19
- controlled vocabulary 64, 66-67
 - words from 106
- correspondence
 - archives 220
- critical abstracts 143-144
- cross-references 34, 70, 79, 82, 183
 - literature for children 260
 - newspapers 295
 - politics and international relations 301
 - web indexing 123-124
- crosswalks
 - metadata 135
- data standards
 - MDA 270-272
 - museum objects 270-271
- dates
 - museum objects 276-277
 - politics and international relations 302
- definitions
 - book indexing concepts 68-70
 - embedded indexing 86-87
 - index 29-30
 - indexing 7-8
 - metadata 129
 - thesaurus 160
- derived indexing terms
 - automatic indexing 115
- description meta-tags
 - web indexing 127
- descriptive metadata 131
- display
 - web indexing 119
- distance education
 - training 312-319
- document chunking
 - web indexing 122
- Dublin Core metadata 130, 135-139
 - advantages 135-136
 - element set 136
 - template 137-139
- EAD 134, 217
- editing 82, 180-182
 - alphabetical arrangement 185-186
 - cross-references 183
 - errors 182
 - factors influencing 181-182
 - headings 184-185
 - locators 183-184
 - multi-word headings 182-183
 - qualifiers 184
 - scattering 182
 - tasks 180, 182-185
- education 221-225
 - acronyms 224
 - indexing 223-224
 - indexing categories 222
 - intellectual skills of indexers 223
 - South Africa 221-222
 - terms 223, 224
- effectiveness
 - automatic indexing 113, 114
- EISA Library 303
- elections 298
- electronic indexes 6
 - hyperlinking 90-91
 - procedure 89
 - Quark Index Xtention 89-90
- embedded indexing 86-91
 - Business Blue Book of South Africa* 87
 - CD-ROM 90
 - conceptual approach 88
 - decisions 89
 - definition 86-87
 - hyperlinking 90-91
 - locators 118
 - preparations for 88
 - procedures 88-89
 - Quark Index Xtention 87, 89-90
 - QuarkXPress 87
 - software 87
- Encoded Archival Description *see* EAD
- encyclopaedias
 - book indexes 6
- entity representation 21
- entries 69-70
 - arrangement 79-80, 191-192
 - exhaustivity 80-81
 - form 81-82, 259

- layout 186
- lead-in 70
- main 38-39, 77-78
- rating 122-123
- recording 78
- relationships 78, 123-124
- specificity 80-81
- sub 39, 70, 77-78
- thesauri 173-175
- environmental issues 226-232
 - abbreviations/acronyms 230-231
 - analytical chemistry 228-229
 - basic concepts 227
 - biological sciences 230-231
 - chemical names 229
 - environment-specific information 228-230
 - geographical names 231
 - Greek letters 230
 - heavy metals 229
 - history 226-227
 - indexing principles 227-228
 - indexing requirements 228
 - keywords 228
 - scientific/popular names 230
 - social issues 232
 - species/family names 230
 - spelling 228
 - terms 226
 - vocabulary control 228
 - WATERLIT 226-227
- ephemera
 - Africana 199-200
- equipment needs
 - web indexing 120
- equivalent relationships 177
- errors 182
- ethics 18
- evaluation
 - antique maps 211-212
 - indexes 31-37
 - training 319
- events/activities
 - museum objects 277
- events' names
 - Africana 203
- exhaustivity 80-81
- expression of concepts 34
- eXtensible Markup Language *see* XML
- Fairbridge Index* 207
- fees
 - web indexing 121
- files
 - web indexing 120, 121
- films
 - Africana 199
- final index preparation 82-83
- finding aids
 - archives 216-218
- folklore
 - Khoe-San languages 247-248
- format 39-40
- formats
 - periodicals indexes 104-105
- free text
 - museum objects 278
- freelance indexers 308
- functions
 - indexes 29-30, 69
- geology
 - book indexes 6
- geographical entities
 - museum objects 276
- geographical names 231
- global indexes 117
- Google 233, 239
- government publications
 - indexes to 5
- Grahamstown Journal* 4
- Greek letters 230
- guidelines
 - abstracting/abstracts 149-154
 - book indexing 73-74
 - conceptualisation 22-23
 - indexing 38-40, 73-74
 - labour indexing 241
 - museum objects 270
 - newspapers indexing 293-295
 - periodicals indexing 107-110
 - politics and international relations 302
 - subject headings 62-63
 - thesauri 173-175
- handwriting
 - Africana 202
- harvesting
 - metadata 135
- headings
 - form 81-82
 - standardisation 190-191
- health sciences 233-237

- book indexing 234
- collections 234
- Google 233
- Index to South African Periodicals* 234
- indexing aids 234-236
- journals indexed 235
- major indexes 234-235
- Medline* 233, 235, 236
- MeSH 235-236
- National Library of Medicine (Washington) 233
- personal files 234
- PubMed* 233
- recent developments 236-237
- heavy metals 229
- hierarchical relationships 175-176
- Historical Papers (University of the Witwatersrand)* 218
- homographs 81
- HTML 122, 124-125, 132
- hyperlinking 90-91
- Hypertext Markup Language *see* HTML
- illustrations
 - literature for children 261
- inconsistencies 41
 - labour 240
- indent style 77, 186
- Index to SA Legal Periodicals* 252-253
- Index to South African Periodicals* 4, 92-102, 207, 234
 - access to 96, 102
 - additional periodicals 95
 - application and use 96-97
 - compilation 93-94, 95-96
 - contracts 93
 - database providers 96
 - focus 94
 - frequency 101
 - income generation 96-97
 - indexing approach 94
 - information selection 97
 - ISAPOnline 96, 102
 - main indexing fields 99-100
 - National Library of South Africa 96
 - non-scholarly periodicals 97-99
 - periodical lists 94-95, 101
 - periodical selection 94
 - proposal procedures 95-96
 - quality control 102
 - recall 100
 - research support 97
 - standards, rules, guidelines 93-94
 - subject terms 101
 - support 96-97
 - technological advancement 102
 - visibility 102
- The Indexer* 87
- indexers
 - competencies 14-16, 93, 220, 309-310
 - freelance 308
 - intellectual skills 223
 - literature for children 261-263
 - in a monetarist world order 18
 - newspapers 292-293
 - training 307-322
- indexes
 - Africana 201-202
 - archives 216-217
 - author's expectations 38
 - books 5-6, 68-85
 - characteristics 29-43
 - definitions 29-30
 - electronic 6
 - evaluation 29-43
 - format 39-40
 - formation 34
 - functions 29-30, 69
 - government publications 5
 - health sciences 234-235
 - length 39
 - main headings 38-39
 - newspapers 4-5
 - periodicals 4
 - printed 192
 - publisher's expectations 38
 - regulator's expectations 38-40
 - role of 257-258
 - subheadings 39
 - subject expectations 37-38
 - typeface 39
 - types 31
 - user expectations 37
- indexing 13-14
 - aids 234
 - antique maps 210-215
 - archives 216-220
 - automatic 16, 35, 111-116
 - books 68-85
 - categories 222
 - in context 7-19
 - definitions 7-8
 - difficulties 239-241

- harvesting 135
- HTML 132
- inter-operability 135
- item-level 130
- levels 130
- purpose 129-130
- RDF 133
- SGML 132
- standards 131-132, 133-134
- structural 131
- syntax 132
- TEI 133
- tools 140
- types 131
- XML 133
- meta-tags 118, 125-127
 - description meta-tag 127
 - HTML 125-127
 - keywords meta-tag 127
- methods
 - training 317-319
- microanalysis 54, 68
- models
 - training 314, 319-321
- modular abstracts 145-147
- multi-word headings 182-183
- museology 12-13
- Museum Documentation Association *see* MDA
- museum objects 268-284
 - cataloguing 268-269
 - CIDOC Guidelines* 270
 - classification systems 277-278
 - computer use 269
 - data standards 270-271
 - dates 276-277
 - events/activities 277
 - fields and structure 271-272
 - free text 278
 - geographical entities 276
 - ICOM 270
 - language 272
 - materials 277
 - MDA 270-272
 - names 271-275
 - nomenclatures 273-274
 - objects vs text 269-270
 - overview 268-269
 - people 275-276
 - specificity 273
 - styles/periods 277
 - thesauri 273-274
 - vocabularies/vocabulary 273-274, 278
- national bibliographies 285-291
 - bibliographic activities 287-289
 - computer use 288
 - early bibliography 286
 - comprehensive bibliography 286-287
 - the future 290
 - indexing 289-290
 - Lesotho 285-291
 - Lesotho: A Comprehensive Bibliography* 286-287
 - Lesotho Annotated Bibliography* 288, 290
 - place names 290
- National Inquiry Services Centre 4, 96, 97, 227, 234
- National Library of Medicine (Washington) 233
- National Library of South Africa 4, 5, 92, 96
- natural language 57, 64-66, 294-295
- navigation
 - web indexing 121-127
- needs assessment
 - training 315
- new knowledge systems 17
- newspapers 292-296
 - cross-references 295
 - guidelines 293-295
 - indexers 292-293
 - indexes to 4-5
 - indexing features 292-293
 - natural language 294-295
 - online developments 295
- nomenclatures
 - museum objects 273-274
- non-hierarchical relationships 176-177
- non-scholarly periodicals
 - Index to South African Periodicals* 97-99
- notations 54-57
- object names
 - museum objects 271-272, 275
- omissions
 - abstracts 154
- online developments
 - newspapers 295
- online indexing *see* web indexing
- oral data collection
 - Khoe-San languages 248
- oral history
 - Khoe-San languages 247-248
- organisation policy 44-49, 80
- original text 34

- orthography
 - Africana 203-204
- page numbers *see* locators
- periodicals
 - health sciences 235-237
 - indexes to 4
 - non-scholarly 97-99
- periodicals indexing 92-110
 - authority files 106-107
 - authors' keywords 107
 - classification/coding 107
 - formats 104-105
 - guidelines 107-110
 - Index to South African Periodicals* 92-102
 - indexing levels 105
 - overview 103-104
 - principles 103-110
 - teamwork 110
 - words from abstracts 106
 - words from controlled vocabularies 106
 - words from text 106
 - words from titles 106
- personal files
 - health sciences 234
- personal names
 - Africana 203
 - museum objects 275-276
- pertinence 37, 113
- philosophy 13
- photographs
 - Africana 199
 - archives 218-219
- physical description 54
- pitfalls
 - web indexing 119
- place names
 - Africana 203
 - national bibliographies 290
- political economy of information 17
- politics and international relations 297-304
 - cross-references 301
 - dates 302
 - EISA Library 303
 - elections 298
 - guidelines 302
 - indexing rules 299-302
 - individual approaches 300
 - international relations 298
 - Jan Smuts House Library 303
 - keywords 299-300
 - neutral stance 300-301
 - politics 298
 - thesauri 299
 - unique features 298-299
- postcoordinate indexing 59-60
 - Boolean operators 59-60
- precoordinate indexing 58-59
- presentation
 - book indexes 180-182
 - printed indexes 192
- professionalisation 6
- programmes
 - training 317-321
- promotion
 - labour indexing 241
- PubMed* 233
- publication
 - antique maps 214
- publishers
 - literature for children 263-266
- punctuation 174
- qualifiers 184
- Quark Index Xtension 87, 89-90
- QuarkXPress 87
- race relations
 - book indexes 5
- RDF 133
- records management 12
- reference sources
 - Africana 202
- related disciplines
 - of indexing 12-13
- related terms 34
- relationships between entries 78, 123-124
- relevance 37
 - automatic indexing 113
 - web indexing 122-123
- religion
 - book indexes 5
- requirements-oriented approach
 - conceptualisation 24-25
- Resource Description Framework *see* RDF
- resources
 - indexing 201-202
- run-on layout 77, 186
- SABIB *see* *South African Bibliography*
- SABINET 4, 96, 97, 208
- scattering 182

- scientific/popular names 230
- scope notes
 - thesauri 165
- search engines 17, 117, 127, 233, 230
- services to clients
 - Unisa Law Library 254-255
- set-out layout 77, 186
- SGML 132, 217
- short courses/workshops
 - ASAIB 310-312
- signs
 - Khoe-San languages 245-246
- simplistic approach
 - conceptualisation 24
- singular/plural 82, 173
- situation analysis
 - training 315
- social issues
 - environmental issues 232
- Society of Indexers (United Kingdom) 6, 42
- socio-cognitive approach
 - conceptualisation 25-26
- software 83-84
 - embedded indexing 87
 - thesauri 177-178
 - web indexing 119
- South Africa(n)
 - bibliography history 205-209
 - education 221-222
 - indexing history 3-6, 205-209
 - literature for children 263-266
 - Jewish history 5
- South African Bibliography* 205-208
 - African studies* 208
 - Africana* 201, 202, 206-207
 - authority files 208
 - developments 206-207
 - Fairbridge Index* 207
 - history 205-206
 - Index to South African Periodicals* 207
 - South African Freedom Struggles* 208
 - South African National Bibliography* 207-208
 - South African Studies* 208
- South African Freedom Struggles* 208
- South African Legal Abbreviations* 253
- South African National Bibliography* 207-208
- South African Studies* 97, 208
- South Africanisms 204
- spaces 187
- species/family names 230
- specificity 80-81, 273
- spelling 174, 228
- Standard Generalised Markup Language *see* SGML
- standardisation/standards 189-193
 - archives 217-218
 - arrangement 191-192
 - book indexing 73-74
 - headings 190-191
 - introductory notes 190
 - Index to South African Periodicals* 93-94
 - ISO documents 189, 192-193
 - literature for children 258-261
 - locators 191
 - metadata 131-132
 - museum objects 270-271
 - presentation 192
- structural cataloguing
 - antique maps 212-214
- structural metadata 131
- structure
 - thesauri 164-165
- structured abstracts 144-145
- style
 - abstracting 150
 - book indexing 76-77
- styles/periods
 - museum objects 277
- subheadings 39, 70
 - form 81-82
 - formulating 77-78
 - literature for children 260
- subject
 - analysis 17
 - description 53-67
 - headings 58, 60-63
- synonyms 81
- syntactic analysis
 - automatic indexing 116
- syntax
 - metadata 132
- table of contents
 - literature for children 261
- task analysis
 - training 316
- taxonomies
 - learning outcomes 316-317
- teaching aims/learning outcomes
 - training 316-317
- teamwork
 - periodicals indexing 110

- technical presentation
 - book indexes 179-188
- technology 17
- TEI 133, 217
- telecommunication 13
- terminology/terms 165, 166, 173, 223, 224, 226, 240, 245-247
- text
 - searching 112, 113
 - words from 106, 112
- Text Encoding Initiative *see* TEI
- thesauri/thesaurus
 - abbreviations 174
 - archives 217
 - authority files 208
 - characteristics 160-163
 - compilation steps 169-173
 - compound terms 174-175
 - construction of 159-178
 - definitions 160
 - equivalent relationships 177
 - guidelines 173-175
 - hierarchical relationships 175-176
 - indexing terms 165, 173
 - museum objects 273-274
 - non-hierarchical relationships 176-177
 - overview 159-160
 - punctuation 174
 - relationships application 175-177
 - relationships between terms 166-169
 - scope notes 165
 - singular/plural 173
 - software 177-178
 - spelling 174
 - structure 164-165
 - use of 163-164, 299
 - verbal subject description 57-58
 - words from 106
- Thesaurus of South African Legal Terms* 253-254
- time frames
 - web indexing 120
- titles
 - words from 106
- training 307-320
 - ASAIB 310-312
 - teaching aims/learning outcomes 316-317
 - competencies 309-310
 - distance education 312-319
 - evaluation 319
 - freelance indexers 308
 - instructional design 313-315
 - methods 317-319
 - models 314, 319-321
 - needs assessment 315
 - overview 307-308
 - programmes 317-321
 - short courses/workshops 310-312
 - situation analysis 315
 - skills 312
 - task analysis 316
 - taxonomies 316-317
 - theory 308
 - web-based instruction 318
 - what to teach 315
- translation 9, 76
- trial-run indexing
 - web indexing 121
- truncation 115
- typeface 39
- types of index 31
- typestyle 187
- uniform resource locators *see* URLs
- Unisa Law Library 250-256
- URLs 118
- users 37
 - children 262
- verbal subject description 53-67
 - abstracting 57
 - controlled vocabulary 66-67
 - decisions 63
 - indexing 57
 - language 63-66
 - notations versus 54-57
 - overview 53-54
 - quality of 67
 - postcoordinate indexing 59-60
 - precoordinate indexing 58-59
 - subject headings 58, 60-63
 - thesauri 57-58
- visual architecture
 - web indexing 124-125
- vocabulary control 64, 66-67
 - environmental issues 228
 - museum objects 273-274, 278
 - thesauri 159
- WATERLIT 226-227
- web-based instruction
 - training 318

- web indexing 17, 117-128
 - authoring tools 119
 - availability of files 121
 - boundaries 119
 - decisions/questions 119-121
 - display 119
 - equipment needs 120
 - fees 121
 - HTML 125-127
 - input of entries 120
 - Internet retrieval 118, 125
 - intranets 119
 - kinds of files 120
 - maintenance 120
 - meta-tags 125-127
 - navigation system 124-125
 - navigational tool 121-124
 - overview 117-118
 - pitfalls 119
 - rating entries 122-123
 - relationships between entries 123-124
 - relevance 122-123
 - software 119
 - time frames 120
 - trial-run indexing 121
 - URLs 118
 - visual architecture 124-125
- website indexing *see* web indexing
- weights/measures/monetary systems
 - Africana 204
- William Cullen Library (University of the Witwatersrand) 218
- Wits Africana Library 214
- word association
 - automatic indexing 112
- word-by-word arrangement 80, 185-186, 259
- words
 - from abstracts 106
 - from controlled vocabularies 106
 - from the text 33, 106
 - from titles 106
- World Wide Web *see* WWW
- writing style
 - abstracts 150-153
- WWW 113, 115, 118, 217
- XML 133

This book represents a highlight in ASAIB's ten-year history, and fills a gap in the Southern African literature on the methodology of indexing.

Indexing is a strange occupation and one that requires a special type of personality – one who thrives on creating order but also one who is blessed with an essential mix of an informed background, a sparkling curiosity, the ability to make lateral connections and the patience to untangle the strands of the narrative and then weave them anew into a finding instrument that is logical, succinct and un-emotive.

To create this retrieval tool, the indexer has to plunge into another's way of thinking and often with very little time at hand, familiarise oneself with the intricacies of a subject that is often new and complex. How is this achieved? Practical experience is often cited as an essential component of a good indexer but how does one acquire this experience? This manual has been carefully crafted to assist the user in overcoming the twin vagaries of ignorance and inexperience, as a practical guide produced by well-known experts in the field.

This book will assist both newcomers and those already versed in indexing techniques; it is a book written by Southern Africans for Southern Africans. These two factors alone make it a unique manual in the indexing community and it should have a timeless appeal for future generations of indexers.

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