From the President

Happy New Year! I hope everyone had a good holiday break and enjoyed the Christmas/summer season. I'm sure most of you will be back into the swing of work by now. I am having an extended holiday this year, visiting my family in the USA. I am writing this column from El Paso, Texas, where we are enjoying a mild winter (18 degrees Centigrade)—much more pleasant than the 35 degree heat I left behind in Canberra!

My thoughts haven't dwelt much on indexing lately, but a request for taxonomy services which followed me to Texas via email started me thinking about future directions for indexing, and how everything old is new again. As I write, the Chinese are about to celebrate their New Year—the Year of the Dog. For ANZSI indexers, 2006 may well be the Year of the Taxonomist. Taxonomy seems to be the 'flavour of the month' at present and like many new concepts, it has strong roots in familiar material from the past. Many indexers have had experience in developing and using taxonomies, but have known them by different names: classifications, thesauri, subject headings lists, etc. All are slightly different, but all have the same focus: to provide controlled terminology which will improve access to a document or documents. Sound familiar? Of course it is—this is what every indexer, be it in back-of-book, web or database indexing, strives to do.

> Taxonomy seems to be the 'flavour of the month' right now, but like many new concepts it has its roots in familiar material from the past.

Why, suddenly, is there a renewed interest in what we have been doing for decades, even centuries? A lot of the interest is coming from the relatively new Information Technology industry, which has a tendency to believe the world was a void before IT began. Knowledge Management, metadata, taxonomies, search engines and a myriad of other concepts are extensions of or re-inventions of traditional tools of indexers, librarians and others. Many website developers are finally realising what the library community has known for ages: useful information depends on good access to it. Web developers are starting to see that they need to improve access to the information on their websites, that taxonomies can help, and that indexers can develop taxonomies. More and more, indexers are getting requests to create taxonomies (thesauri), or to apply them to web pages via metadata (subject indexing).

So what are taxonomies? Let me take you through a few definitions, some of which may be familiar to database

indexers. *Controlled vocabularies* are lists of terms used consistently to describe the content of an item. They can describe subjects or objects. The purpose is to use one term for one concept—a swimsuit is always called a swimsuit, even if the author sometimes refers to it as a 'swimming costume'. Users are pointed from the non-preferred term (swimming costume) to the preferred term (swimsuit) where they will find references to all the material on the topic. Indexes are by definition controlled vocabularies. Back-of-book indexers choose their preferred terms based on the language used by the author. Database and web indexers often use *thesauri*, which are lists of preferred terms and their non-preferred synonyms.

Thesauri are usually based on the concept of a *hierarchical structure* for the terms. Using our swimsuit example, the broadest term in a hierarchy might be clothing. A type of clothing is 'sportswear'. A type of sportswear is a 'swimsuit'. A type of swimsuit is a 'bikini'. The terms progress from the broader to the narrower, and vice versa. This hierarchical structure for a subject area, or for a range of objects, is called a *taxonomy*. Navigation structures on websites, business classification schemes, and scientific genus-species classifications are examples of taxonomies.

Deadline for the March 06 issue: 24 February

Which indexing program?

After the ACT Region Branch's panel talk on 'A Day in the Life of a Back-of-Book Indexer', I had an email from a librarian who wanted to know what computer indexing software was used by members of the panel. This topic had not been raised in the panel so I offered to conduct a survey, which was advertised in the Newsletter. I did not get as many responses as I had hoped, but between verbal comments and some written analyses there were enough to form the basis for this report.

Cindex (advertised on page 7) seems to be the most popular, and is the only indexing program that can be used on Macintosh computers. You can try it out free by downloading its demonstration software from the Internet. If you like it, you can then order by email, and the company responds very promptly.

A newcomer to indexing, Alison Sloper, comments: 'With the software comes a 320-page, spiral bound user manual, which takes you from the very beginning of installation and creating an index. I picked up my software from the post office on the same afternoon that I collected my first indexing job. I read through the first few chapters of the guide that evening and had no trouble using the software the next day. Everything was very straightforward and so simple, with many of the basic commands being the same as in Microsoft programs.'

Shirley Campbell uses Cindex for back-of-book and newspaper indexing. She says: 'I chose Cindex because I was impressed by the commitment of Frances Lennie and her company to the product and to the profession of indexing. Frances comes to our AusSI/ANZSI conferences, so that members who use Cindex can build up a personal relationship with the provider of the software. Also. at the 2005 ANZSI Conference Frances ran a workshop which was immensely useful. Although the company is based in the US, the support for the software has been excellent. Emails are answered promptly and advice given readily.'

Other indexers, including members from rural NSW and Queensland, have made similar comments.

One Victorian indexer, Elizabeth Wood-Ellem, chose **Macrex**, because she preferred to use a UK product rather than a US one, and because Max McMaster is on hand to help with problems. But two ACT members who have tried Macrex say they have found it unhelpful.

Jean Norman, an experienced ACT indexer and member of the Registration Panel, uses **SkyIndex** (v. 6), saying: 'I don't have a library background and have never indexed using cards, so its spreadsheet format suits me very well. A split screen shows entries and the index itself, and when you finish entering, editing and sorting, it generates a word processor file for further editing.'

Sherrey Quinn, another experienced ACT indexer, uses SkyIndex for back-of-book indexing and says: 'I chose Sky because it was favourably reviewed (as were other programs), and I liked what I read about its technical features (particularly those which assist in speed of data entry, and others such as being able to import or export indexes created in other programs). I read Michael Wyatt's review and comparison with other programs, and some other information about it. I realise that many of its features are also in its competitors (such as Cindex). However, once I had tried the demo version of Sky I found that it appealed to me, and I find the interface easy to use and quite intuitive. It was easy to buy, delivery was immediate and support is good.'

Sherrey adds: 'I also use **INMAGIC DB/Textworks** for biblio-graphies or database indexing. I have been using this for 20 years, for any work that requires capturing data and indexing it in any way. I have used it for bibliographies, subscription records, subscriber lists (generating invoices, mailing labels etc), and databases which describe things as diverse as traffic control devices, or the characteristics of libraries.'

I hope that these comments will be helpful to members who are considering buying one of these programs.

Edyth Binkowski.
ACT Region Branch Secretary

Duplicate *Indexer*s anybody?

Did you get two copies of the October 2005 issue of *The Indexer*?
If so, please tell Glenda Browne at <webindexing@optusnet.com.au> and all will be sorted out.

Taxonomies by themselves are useful, but not as powerful for information retrieval as *thesauri*. A thesaurus adds an extra dimension to a taxonomy. Instead of just indicating broader-narrower (or whole/part) hierarchical relationships, thesauri also incorporate additional information and different types of relationships. Thesauri particularly indicate related terms, not only broader and narrower terms—in other words, a 'see also' relationship. Thesauri can also include definitions of terms or instructions on how to use or apply them (called *scope notes*), listings of non-preferred terms, indications of the top terms in a hierarchy, alphabetical displays of all the information attached to each term, etc. Taxonomies are a structural outline; thesauri fill out the structure and are a more helpful working tool.

A new addition to the continuum of 'controlled vocabulary / taxonomies / thesauri' is the computer concept of *ontologies*. These are semantic 'rules' which define and govern the thesaurus relationships, and allow many more relationships than the broader/narrower/related/preferred/non-preferred of traditional thesauri to be expressed. Ontologies are still in the stage where everyone has a different idea of what they are or what they do, and I'm not even going to attempt to explain my understanding of them! There are a number of good articles on the Internet dealing with these concepts—try a Google search on the terms 'taxonomy thesaurus ontology' for some interesting reading.

In the past few years I have been asked to develop a number of taxonomies for websites, and on consultation often found the client really needed the extra power of a thesaurus. If you are approached, don't assume your client knows the difference—it has been my experience that many IT people automatically use the terms they are more familiar with—taxonomy and ontology—because they simply aren't aware that a thesaurus is a different, and perhaps more appropriate, tool.

If you found this column interesting but are still a bit unsure of how it all works, there is help at hand. The NSW Branch of ANZSI will be holding a Taxonomy Workshop early this year—watch the Newsletter for details. I will be running a Thesaurus Development session in March or April for the ACT Branch, which will cover material based on a workshop I will be giving at the commercial 'Enterprise Knowledge' conference in Sydney in March. We are hoping to generate a discussion group about taxonomies and thesauri—Madeline Davis from the NSW Branch has been instrumental in calling for interested parties to come together via email. If it truly will be the Year of the Taxonomist, ANZSI indexers will be well prepared to embrace it.

Happy indexing, and/or taxonomising!

Lynn Farkas,
ANZSI President

The Royal Society of Victoria visit

On a sunny Sunday afternoon last November, 21 ANZSI members and friends visited the Royal Society of Victoria, located in one of Melbourne's historic buildings. Founded in 1854, the Society has a long history of important contributions to science, technology and discovery. These include forming government policy on science; surveying the natural resources of Victoria; establishing the Museum and National Parks; convening the first Australian Antarctic Exploration Committee in 1886; organising the Burke and Wills expedition; and more recently, establishing the Victorian Institute of Marine Sciences.

Viv Martin, Administrative Officer and Website Manager, and Doug McCann, Honorary Librarian, welcomed us in the grand Supper Room and then gave us a guided tour of the meeting rooms, lecture hall and magnificent library, ending with a talk on the history of the Society and its members.

The Royal Society's library is now held and managed by Deakin University, an arrangement initiated by Professor Neil Archbold, the keynote speaker at our 2005 ANZSI Conference (alas, he passed away last November—see obituary on page 6). The main part of the library, largely made up of exchange copies of journals and proceedings from similar societies worldwide, has been placed in a special room within Deakin's new library at Burwood. Its 1400 titles have been entered into the national catalogue Kinetica (Libraries Australia), where they generate 12 to 15 requests each week.

After the visit we enjoyed coffee with Viv and Doug, so concluding a fascinating and rewarding Sunday afternoon.

Mary Russell

NSW Branch taxonomy seminar

NSW Branch will be holding a taxonomy seminar on **Sunday 5 March** at the NSW Writers' Centre Board Room in the grounds of Rozelle Hospital (enter the Hospital from Balmain Road opposite Cecily Street and follow the signs to the Centre). For bus and parking information go to <www.nswwriterscentre.org.au/> and click on 'Location and transport'.

The session will run from 1.30 until 4.30 pm, but you can arrive for a chat any time after 1.00 pm. Afternoon tea will be provided.

Planned speakers are Prue Deacon, Sherrey Quinn, Mary Huxlin and Elizabeth Drynan, with Helen Skewes as Chair.

The seminar will start with clarification of the terminology (ontologies, taxonomies, classification scheme, thesauri and so on) and the importance of being quite clear on what a client understands by taxonomy. This will be followed by discussion of specific taxonomies and other vocabularies, including the principles and steps to take when building a scientific/technical taxonomy. We also hope to have a speaker from the museum sector.

Cost is A$30 for ANZSI members, A$45 for nonmembers. Please phone Glenda or Jon on +61 2 47398199, or email <webindexing@optusnet.com.au>, to let us know you are coming.

Further details will be posted on the website and aliaINDEXERS closer to the date.

From the literature and other thoughts

I recently purchased two books from the Australian Society of Authors (<www.asauthors.org/cgi-bin/asa/publications.cgi/Home>), and was given a review copy of another. They contain a small amount of information directly relevant to indexing, and more that is indirectly related to indexing or relates to the publishing context. All are published by the ASA's Keesing Press, which was funded by a bequest from Nancy Keesing.

- Methold, Ken. *A–Z of authorship: a professional guide.* 3rd ed., electronic version. Strawberry Hills, NSW: Keesing Press, Australian Society of Authors, 2002. 237p. A$12.00 (royalties are donated to the ASA).

- Australian Society of Authors. *Australian book contracts.* 3rd ed. Strawberry Hills, NSW: Keesing Press, Australian Society of Authors, 2001. 116p. Nonmembers A$27.50 + A$3.30 postage

- Spender, Lynne. *Between the lines: a legal guide for writers and illustrators.* Strawberry Hills, NSW: Keesing Press, Australian Society of Authors, 2002. 272p. Nonmembers A$38.50 + A$5.50 postage

A-Z of authorship is emailed in PDF format. It contains, in dictionary format, everything that Ken Methold found useful to know as a professional author, including topics such as 'Cooperative publishing', 'Copyright', 'Covering letters', 'Greeting cards', 'Investigative journalism' and 'Literary estates'.

The 'Approved (ASA) contracts' section says: '*Supply of extra material.* The most common "extra" is the index of a non-fiction work. Authors who are not able or willing to compile their own indexes will probably have to pay for it to be compiled out of their royalties. Professional indexers' fees are commensurate with the amount of work involved and can be a considerable charge against royalties to be earned. The ASA recommends that publishers pay for professional indexing as a production cost.' Most indexers would agree heartily with the last sentence!

The 'Indexing' section expands on the above, and makes two interesting points. One is the suggestion that 'Indexing can be a useful supplementary occupation for the freelance writer as it is the kind of work that can be fitted in with one's own work.' The other is the idea that: 'Some authors want to work on the index because it can reveal any serious omissions from the work.' I agree that indexing can detect faults in a book, however, it is not much use finding any 'serious omissions' when the book has been finalised. If there are serious omissions at the indexing stage it suggests a failure in writing and editing.

There is a section for the Australian Society of Indexers (AusSI; not yet updated to ANZSI) and one on the Arts Law Centre (<www.artslaw.org.au>), which offers a mediation service. This could be useful for indexers having contract or payment difficulties.

The *A–Z of authorship* is easy to read and well-structured, and I recommend it for anyone interested in the broader field of writing and publishing.

Australian book contracts is divided into print (writers and illustrators) and digital contacts. Each part goes step-by-step through the ASA's Minimum Approved Contract, with notes on the significance of clauses that may be offered. For example, Part 1, Delivery, says: 'Do not accept a clause which says the manuscript shall be "satisfactory to the publisher"'. As I write this (September, 2005), there is a discussion on Index-L about the inclusion of this requirement in a contract an indexer was asked to sign.

As well as giving specific advice, the book encourages authors and indexers to have confidence in their ability to negotiate, saying: 'All clauses in all contracts are negotiable. Any contract offered is an opening bid.' This is relevant to many indexers who are asked to sign contracts with requirements that are not easy to comply with. See, for example, the summary of Robyn Colman's survey on insurance for editors and indexers (p.6, www.aussi.org/anl/2005/May05.pdf).

There is a list of definitions at the start of each section. Some are useful, but others seem obvious (e.g. 'GST' and 'CD-ROM') or wrong (e.g. 'Ebook' defined as a 'hand-held reader for digital materials').

The ASA also provides a contract advisory service for members. I would strongly recommend either the use of the service or detailed perusal of this book for anyone about to sign an authoring contract. People interested in indexing alone, however, would be better served by *Between the lines* with its broader scope.

Between the lines has eight chapters covering copyright, defamation and censorship, contracts, ethics, getting paid, money matters, wills, gifts and bequests, and the politics of authorship.

Copyright exists for 'compilations of information' (p. 11), which should cover indexes. There have been discussions on Index-L about the use of copyright ownership in indexes as a lever for getting money from problem payers. This section also discusses moral rights, which give indexers and other creators protection from distortion of their work.

On indexing, the 'Contracts' chapter states: 'Some authors are prepared to argue that complex indexes and bibliographies should also be a production cost and be done by a professional indexer but others prefer to manage these themselves, particularly if they are skilled as indexers or are familiar with software packages that make these tasks easier.' (p.107)

There are lots of warnings in the book, with anecdotes from writers who have been conned by fraudulent poetry competitions, unethical publishers and so on. I think we are lucky as indexers that we avoid some of the more complex problem areas, and can skim a lot of the legal and ethical sections of the book saying: 'that won't be relevant to me'. Similarly, we are not likely to have copyright to leave in our will, or significant documents to donate as a tax-deductible 'Cultural Gift'.

In the 'Getting paid' chapter there is practical advice in the section 'Chasing money owed', including use of letters of

demand or a small claims court, while the 'Money matters' chapter covers income tax, GST, superannuation and insurance. Indexers are not the only ones hassled by insurance requirements. Two writers were invited to speak at a writers' festival, and then asked to provide their own public liability insurance!

'The Politics of authorship' chapter discusses the low incomes of authors (which have dropped relative to other occupations over the last fifteen years), and the 'conglomeritis' caused by constant takeovers in the industry. Changing conditions include lower royalties, and fewer lunches and launches. Apparently early in the twentieth century 'there was no mention of authors paying for editing or indexing'.

Both the contracts book and *Between the lines* were ably indexed by Diane Harriman, who is acknowledged at the front of the book. The *A–Z of authorship* (dare I say it?) doesn't need an index as it is alphabetically arranged AND electronically searchable (although I guess if you printed it out, a printed index might be handy).

As I said earlier, all these books contain something of interest to indexers. There is a fair bit of overlap, with topics such as contracts covered to some extent in each of them, which means an indexer would be unlikely to buy all three. The *A–Z of authorship* gives a good overview of many aspects of publishing and writing, while *Between the lines* is more relevant for those concerned about legal and financial issues (and may therefore be the one most indexers are likely to consult).

Glenda Browne

How to index, for non-indexers—an overview

(Talk presented to the Canberra Society of Editors meeting in September 2005 with the title 'Indexing for non-indexers!'. A condensed version of this talk appeared in the ANZSI November–December newsletter)

These are the basic steps involved in indexing. Following this sequence will ensure that you cover all the basic processes for creating an index, but be warned—indexing is an intellectual task undertaken by information analysts. Only experience, practice and a predisposition for information retrieval can help you decide what to include and what not to, how to identify key concepts, and how to present your index in a clear and concise manner.

1. ***Read the document*** all the way through, at least once before you begin indexing (you will probably be reading most or all of it a number of times again as you progress). Get a feeling for the main issues, important points, general structure, etc of the document.

2. Beginning at the start of the document, go through it page by page*, **identifying key concepts**,* names, places, non-text items (maps, photos, illustrations) etc which should be included in the index. Some indexers highlight these in the work (if using paper-based products), some transcribe the terms onto cards, most enter the terms used directly into an indexing software package. Be sure to include page numbers for every item you record. Try to use the author's words, but if a concept is there but not named, include it as an entry point. (Note, this step may include going back through the document a number of times)

3. ***Sort the 'entries' you have created into order***. Most indexes are in alphabetical order, but you have choices about filing arrangements, and for historical or biographical works you may also choose to arrange sub-entries into chronological rather than alphabetical order. If using file cards, this will be a manual sorting exercise. If using software, the program will sort for you.

4. ***Edit your entries for structure***. Identify synonyms for the same concept and ensure you make cross-references from variant terms to the preferred term. Identify related concepts or terms and add 'see also' references to link them in the index. See which concepts have large numbers of page references attached and decide if these can be broken down into smaller groupings. Decide on the wording for these 'subheadings'. Change the wording of your entries (or 'headings' as they will now be called) to reflect the decisions you have made.

5. Sort your entries again, and ***edit for content***. Are the headings consistent in format? Do they reflect everything in the work? (you may have to re-read parts, or all of the work to check this). Can they be 'read' and understood easily, particularly the subheadings? Do all your references lead to something relevant? Make any changes needed to ensure full and correct content.

6. View your entries in the final format (e.g. in the number of columns and font size required by the publisher), and ***edit for space limits***. Are you within the page limit specified by the publisher (most indexes aren't, at this point). If you exceed the space limit, '***prune' your index*** by cutting out the least essential or least informative entries, reducing the number of subheadings, and/or amalgamating similar headings into one broader concept heading.

7. If necessary, sort your entries again to reflect the changes in Step 6, ensuring that if you have merged some headings or subheadings your page numbers have migrated to the correct heading. Now ***edit for style***. Ensure commas are in the correct place, bolding and italics are used when needed, capitalisation is appropriate, leading articles are not used as filing points, etc.—the Style Manual covers all the points you require.

8. ***Check your final 'proof' for accuracy***. Do a spot check of page numbers to ensure you have transcribed them correctly. If you haven't done so already, run a spell-check over your headings. Re-check your cross references and decide if any can be converted to double indexing (this is useful if a 'see' reference only has one or two page references attached; in that case it is easier to add the page numbers

after both forms of the heading rather than creating a 'see' reference from one to the other).

9. Add an introductory paragraph if necessary, ***explaining any symbols*** you have used to indicate maps, illustrations etc (for example page numbers in bold or italic). Provide the client/publisher with your ***index in an agreed format***—many prefer an electronic copy plus a paper copy.

10. If you have reached this point and are happy with your results, congratulate yourself—you have created your index! If you have reached this point and are not happy with the results, ***call a professional indexer*** and get some help.

Indexing Tips for Non-Indexers

1. ***Include an index***. The detailed information in most nonfiction documents requires detailed access. Even a comprehensive table of contents will not cover all the issues or ideas in a document.

2. ***Use an indexer***. Professional indexers can index more efficiently than you can. They have the expertise, experience and specialist tools to get the job done quickly and correctly, the first time. In the long run they will save you money, either in real dollars or in equivalent time spent on the task. There are freelance indexers available in all states and territories. The Australian and New Zealand Society of Indexers (ANZSI) maintains a directory of indexers, some of whom have undergone the Society's registration process which ensures their work meets our basic standards for good indexing.

3. ***Don't use word processing index generators***. Not unless you are very proficient with manipulating the word processing package, and/or have lots of time to spend editing your final product. While the index generators in word processors are improving, they do not yet (and probably never will) provide the special time-saving features of dedicated indexing software.

4. ***Invest in indexing software if you intend to index yourself***. Cindex, Macrex and SkyIndex are used by professional indexers around the world, are well supported by their parent companies (and some by agents in Australia), and are relatively inexpensive. They have been developed by practitioners in the indexing profession, and include lots of advanced features appreciated by freelancers. They are all relatively simple to operate, and you can be up and running creating a basic index fairly quickly.

5. ***Buy the most recent Style Manual***. The chapter on indexing was written by one of Australia's longstanding practicing indexers and provides all the basics to get you through a DIY index.

6. ***Visit the ANZSI website***. The Australian and New Zealand Society of Indexers' website provides information and links to indexing issues, as well as a directory of practicing indexers if you decide the task is too much for you! Visit us at <www.aussi.org>. In addition to setting recommended rates for indexing and providing information for potential clients about what an indexer can do, the Society runs biennial conferences and numerous state-based workshops and training sessions, which are open to nonmembers. The ANZSI site can also link you to the websites of other affiliated bodies overseas (e.g. the American, Canadian and British indexing groups).

Lynn Farkas,
President, ANZSI

ANZSI ACT Region Branch records

ACT Region Branch Committee has been trying to bring together the records of its early years. The Newsletter has reported on Branch activities from its creation, and since there is so little else in the way of Branch records, we aim to assemble and preserve a complete set of Newsletters. The Committee members have offered their own issues, so the set is now complete back to 1993, with earlier records as follows:

1992: v.16, no issues;   1991: v.15, nos 3 and 5;
1990: v.14, nos 1–2;   1987-89: v.11–13, no issues;
1986: v.10, nos 2–4;   1985: v.9, complete.

We hold no issues of vols.1–8. If you have any of these early issues and are willing to part with them or copy them, please contact the ACT Region Branch secretary by phone on +61 2 6281 2484 or by email at <geoffb@webone.com.au>.

Edyth Binkowski
ACT Region Branch secretary

ANZSI ACT Region Branch BBQ

The Branch held its traditional summer barbecue in early December by Lake Burley Griffin, enjoyed by all (including a large gaggle of greedy swans). More about the function and some photos in our next issue, space permitting.

Vale Professor Neil Archbold

Those of us who went on the tour of the Wonthaggi Coal Mine last year or attended the ANZSI Conference in March 2005 would remember Neil Archbold, who provided such a knowledgeable commentary on coal discoveries in the Wonthaggi area and gave the keynote speech at the Conference. Neil's health was not good, and he passed away late last year in Argentina where he had just attended a geology conference.

Max McMaster attended his Memorial Service in December and conveyed our sincere condolences to Neil's family. On page 3 in this newsletter you can read an account of a recent visit by ANZSI Vic Branch to the Royal Society of Victoria. Neil was a past President of the Society, and helped to ensure a permanent home for its fine library collection, now hosted by Deakin University.

Jenny Restarick

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