The August Indexer

27–29 August 1999 Hobart, Tasmania

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Findlay, Margaret (editor), The August Indexer: Proceedings from the Second International Conference of the Australian Society of Indexers, Hobart, 27-29 August 1999, Melbourne: Australian Society of Indexers, 2000.

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Paper presented at the 'August Indexer' Australian Society of Indexers Conference, 27-29 August Hobart, 1999.

Freelance Indexing

Glenda Browne

Introduction

This paper is a practical approach to starting and developing an indexing career.

There is no direct career path into indexing, and most of us discover it through a chance stroke of luck. Indexing is very often done freelance, and getting started is hard as clients are often reluctant to employ someone with no track record of successful work.

Once the work starts coming, you have to develop skills in satisfying clients, which depends largely on listening to their requirements, and making sure you fulfil them. Promoting your indexing service then ensures that you have an adequate supply of work, and, eventually, that you are able to chose the work you prefer at the rates you deserve.

Another benefit of experience is that you have the chance to try a variety of indexing work, dealing with different subjects, clients, and formats.

Get started

It is crucial that indexers have an aptitude for the work. You will discover this early on as you attempt your first projects. Personal characteristics include a reasonable general knowledge, the ability to learn, curiosity, attention to detail, interest in linguistic issues, and the ability to see things from somebody else's point of view.

Training

The next step is to get training. The best way to do this is probably through a formal course run by AusSI or one of the other indexing societies, or as part of training in another field such as Librarianship. Failing this there are distance courses available (eg from the Society of Indexers, UK). A number of fine indexers learnt from their parents or spouses. Indexers working in specialised fields (eg law) and formats (eg databases) might learn on the job.

This training should be supplemented with learning from books, online discussion groups, and personal discussions.

Build on strengths

Most people will not choose to employ a novice indexer unless they have another selling point. This is most likely to be your special subject skills, but could also be your availability, software knowledge or some other skill. Your first marketing effort should be done in the area you are most competent in. If you do not have any special subject knowledge consider your knowledge of users, contacts you have, or anything else that will make you stand out.

I was fortunate that I got my first job as an 'apprentice'; my second came from personal contacts (from an author who was going to do the index herself, until she tried it); my third came in response to an ad for an indexer with a scientific background. From there, it became much easier (although never straightforward).

Indexing contacts

You need contact with other indexers (at least, I do) to have someone to ask questions of, and to share gripes with. Fellow indexers also refer work when they know you. If you are very lucky you might find a mentor when you are starting out. AusSI branches and groups have regular meetings. If you can't make it to these you can have virtual contact with indexers from around the world through Index-L, the Internet discussion group and aliaINDEXERS.

Client contacts

The more potential clients you meet, the more work you will get, and the more you will understand the environment in which you are working. Try attending meetings of the local Society of Editors, or other groups such as Technical Communicators if they work on documents of interest to you.

Try some courses run by these groups for the same reasons – you meet people for a whole day, and you get to learn about things that are important to them. I have been to meetings and a course run by the NSW Society of Editors. I enjoy them, and better still, I have finally met some of the editors for whom I have worked.

Respond to advertisements, even if they don't specifically request an indexer. For example, if a publisher advertises for freelance editorial staff, let them know that you are available for freelance indexing.

Advertise

Advertise your services in documents read by potential clients. This could include periodicals for authors and editors. We have advertised once in the Thorpe Weekly Newsletter (the blue newsletter). An \$18 advertisement brought one new client, for whom we have done 3 jobs. The ad has easily paid for itself. More importantly for me, it has broadened my range of clients to include authors employing me directly.

Join AusSI, become a registered member, and put your name in Indexers Available. Many of my new contacts now come from my listing in Indexers Available.

Satisfy your clients

Find out what they want

When asked to index a document by a client find out what their requirements are. If you have further queries during the indexing process phone or email them and ask for clarification. Do not assume that there is always a correct answer. Sometimes a decision can be based on a personal preference, and it helps if you know the editor's preferences.

Find out when they need the index. You can also ask for a preferred deadline and an absolute deadline, so you know if there is any leeway (for example if you get sick during the project). Find out if they want you to quote, or if they have a set budget they wish you to fit into.

When you know what they expect, tell it back to them for confirmation. I usually write a letter or email including details of the style and depth of index required, the money agreed to be paid, the number of pages to be indexed, and the deadline.

Tell them if you can't provide it

If you can't do a job within the deadline or budget available, say 'No'. There might be some leeway to give you more time or money. If there isn't, someone else is better off doing the job. If you don't have the skills to do the job, say 'No'. Far better to wait until you can do a good job, and then keep the client.

Keep records of time and cost

Keep lists of all the indexes you have created so you can provide details of successful projects if required. Keep records of the time taken and the money paid so you can compare new projects to previous ones. This can also give a useful comparison of indexing speed if you change your approach in some way.

Explore communication options

Email is a handy way of communicating with clients. We keep an email message open while indexing and type a list of typos and queries as we go. We also send nearly all of our completed indexes by email. If you will be doing this, send a dummy email first to ensure that there are no problems with the transfer.

Warning: Often the bigger the company, the greater the problems.

If you buy a fast printer you will also be able to print page proofs instead of having them couriered to you. I know one indexer who routinely does this. We have been asked once to quote for printing at our site, but perhaps the cost of inkjet printing startled them, as they decided to post us the pages instead.

Shopping list: One fast printer.

Australia Post Express Post gives cheap overnight delivery to major postal centres.

Find out if you supplied them with what they want.

Indexing must be almost unique among the professions (or aspiring professions) as it can be done totally alone. It would be possible to index for a lifetime and never meet a person you have worked for. (This, of course, is one of the benefits, although it also has its downside).

Because we have so little contact with our clients, it is crucial that we establish communication channels to give and get as much feedback as possible. We have started sending a feedback form (half A4 size) with the completed index or invoice, asking clients if they were happy with the time, cost, and quality of indexing.

Most of the feedback has been positive; all of it has been useful. The most significant finding for me is that what I think is important, and what my client thinks is important, is not necessarily the same thing. Some of the feedback was on areas where there was no right answer, but different approaches. It is crucial to confirm that our approach to a text as the indexer (which we might even assume is the only possible approach) is, in fact, the approach the client wants or expects.

I, and I think most indexers, focus on analysis of the text, choice of appropriate indexing terms, and editing the index to show these terms in the best way. While I am sure clients would say these are important, I don't think they assess them much. Editors focus very much on consistency, and this is also something very easy to check in an index. So an easy way to provide a better product is to ensure that the index is as consistent as possible.

Other feedback has discussed the emphasis given to different areas of a book. It is important to clarify this at the beginning of a job. If a textbook on technology contains text and activities, it is important to check whether they should be indexed equally, or if one part is considered more important than the other.

Promote your indexing service

Provide a quality service

The best way to keep getting work is to do good work. Editors might remember your name for years even if they haven't needed an indexer.

Remind people what you do

On the other hand, editors might forget you even if you did a great job for them just last year. Remind past clients that you are still available. (I must admit that I don't do this, but I should. I don't like the idea of losing a good client just because they misplaced my phone number. If I lost them for another reason I would like to hear it).

Keep current clients up-to-date with your availability.

Tell new people what you do

It is amazing how many people write books, or know people who write books. So let your friends and acquaintances know what you do. If you are in a literary or academic environment, this would work even better.

Network with indexers and clients

Network with other indexers as much as you can. Try and pass work on to colleagues if you can't do it. Take your business card to meetings of editors and other potential clients, and gently promote your services.

Provide promotional packages

Brochures, samples, resumes, websites

Create a simple brochure or handout with details of yourself and your indexing service. Photocopy the first page or pages of published indexes so you can provide samples. If required by clients, tailor a resume for indexing work. (However, most clients are more interested in specific indexing experience than a general resume).

Consider setting up a website with information about your indexing service. The advantage of this is that you don't have to print and post details; clients can choose to look at as much or little information as they require; and you might even get extra work from people who find your website by chance.

Suggest indexes for unindexed materials

Don't just look for work that exists: create some opportunities yourself. Two people I know indexed periodicals as exercises when learning indexing, and then went on to sell them to the magazine publisher.

Identify documents within your field of interest that should have an index. Prepare a proposal with a brief sample index and a rough quote for the job and send it with a covering letter to the publisher of the document. Try not to spend too long, as it is very likely that the project won't go ahead, but make a decent sample and write a convincing letter.

I have tried this with a university newsletter. I thought it had a chance as they were funding projects for a 50th anniversary celebration, but there were far too many applications and my one failed. I am also planning to try it with a journal in my undergraduate specialty.

Vary your work

Vary subjects, formats, clients

While I think an indexer should certainly start with their strengths, I would get bored if I only ever indexed in my specialty. The thing I like best about indexing is the variety. I like to dip into the fields of history, pharmacology, management and gardening. I now go past the Northern Beaches, the flour mill on the Lane Cove River, and the Opera House with a special knowledge I gained from indexing books on these places.

My indexing career started entirely with books, usually for commercial publishers. I now have a much broader client base including authors, universities, government departments, corporations, and still (fondly), commercial publishers. I have also, after ten years, had opportunities to index books, databases, periodicals, and websites.

Keep open to new opportunities

I have found that the opportunity for variety in indexing comes with time. There are not a lot of database or pictorial indexing jobs around (in NSW, in my experience), so you just have to wait for the opportunities to arise. Similarly with web indexing. I'm sure it will increase, but it needs vigilance to identify and catch the jobs which are available.

When you sniff a new opportunity check whether you have the basic skills and then grab the opportunity and give it all you've got. Remember that in a new field such as website indexing you might not have a lot of experience, but then, neither does anyone else.

Indexers might also branch out into editing, bibliography, and thesaurus construction, just as editors and technical writers branch out into indexing.

Create new opportunities

Occasionally indexers create 'after-the-fact' indexes to published works and try to sell them.

One innovative indexer created an index to an inadequate computer book, unfortunately just before a new version of the computer was brought out.

People on Index-L thought that there would be potential to sell an index to a work of cult fiction such as a book by Ayn Rand or Ann Rice, but that there would be problems caused by different issues having different pagination. As more texts move into electronic formats this problem may disappear.

In genealogy there are opportunities for innovative indexing projects, although many of these are done on a voluntary basis.

Develop your career

Increasing experience enables you to command better rates for indexing, to choose varied and interesting jobs, to create new opportunities where you see a need, and to expand the definition of indexing beyond traditional boundaries. Good luck!

Journal indexing: some issues and maybe some answers

MAX McMASTER

Freelance Indexer, East Malvern, Vic

Abstract

Although journal indexing on the face of it looks very simple, there are a number of issues which can make life extremely difficult for the indexer when preparing either the annual index or a cumulation to a periodical. This paper will highlight a few contentious areas and provide a number of alternative solutions. Issues to be discussed include: a) the number of indexes to be provided; b) the use of crossreferences in the treatment of multi-articled, multi-authored papers; c) the treatment of articles; and d) the use of general or specific subject terms.

Within the indexing profession, journal indexers are but a small part of the realm. Although some annual indexes to journals are prepared by professional indexers the majority of these indexes are prepared by editorial staff. Fortunately for indexers, the editors tend to shy away from cumulations, and so at least leave us something to do!

At this point I should say that journal indexing and database indexing of journals are not the same thing. Database indexing involves the allocation of a few subject terms from a specialised subject thesaurus and these terms together with the bibliographic details are included in an electronic database. Journal indexing, whether for an annual or cumulative index, can involve the creation of author, title and subject indexes. The subject terms being selected from the terminology of the individual articles, rather than from a thesaurus or controlled vocabulary.

In this paper I want to look at a number of issues in the field of journal indexing. Some of these issues may seem on the face of it to be trivial, but when you are asked by an editor or publisher to prepare the annual index to their journal, asking some pertinent questions can be invaluable.

1. What types of items should be excluded?

Should the index include editorials, letters to the editor, news items, forthcoming events, book reviews, etc. Editorials, book reviews and letters to the editor definitely should be included; news items need to be taken on an item by item basis, and forthcoming events should be excluded altogether.

2. How many indexes should you include?

There are several options:

- Separate author, title and subject indexes, ie. three distinct indexes
- A combined author/title index, and a separate subject index, ie. two indexes
- A combined author, title and subject index, ie. one index

Just to cause additional confusion the combined author/title index entries exist in two forms:

- Either, entry by author, followed by the title.
 - eg. Angus, Sandy and Lea, Traven, Planning for better health outcomes requires Indigenous perspective 636-7.

This is the most common style.

• Or, entry by title, followed by the authors' surname(s) in parentheses.

eg. Planning for better health outcomes requires Indigenous perspective (Angus and Lea) 636–7. Some indexes even use both forms.

My preferred option is to have two separate indexes – an author/title (of the first type) as well as subject. The reasoning behind this decision is that any significant first word in the title will be picked up in the subject terms anyway.

3. Multi-authored articles and the problem of cross-references

Imagine we have a three-authored paper: Brown, R; Williams, C and George, T, 'Title of paper A' 124–37 The primary author index entry would be presented in this manner.

As a means of giving entries to the secondary authors one option (A) would be to create an entry of the form:

Williams, C, Brown, R and George, T, 'Title of paper A' 124-37

The disadvantage of this style is twofold:

a) it gives incorrect weight to the true primary and secondary authors; and

b) it is very wasteful of space

I have only indicated the situation with the second author. In this example alone, the third author should be similarly treated. Just imagine what could happen in a 10-authored paper!

A second option (B) which overcomes the duplication of title entries would be to create cross-references as follows:

Brown, R see Williams, C, Brown, R and George, T

George, T see Williams, C, Brown, R and George, T

Although this looks fine on the face of it, there are problems which I shall come to shortly.

A third, and I must admit my preferred option (C), is to create author cross-references in the following manner. The entry for Williams, C would appear as: Williams, C see Brown, R Similarly the entry for George, T would appear as: George, T see Brown, R

Now imagine a second paper in the journal by the same authors: Brown, R, George, T and Williams, C, 'Title of paper B' 206–11

Main entry under Brown as indicated. Cross-references for George and Williams as in the previous example.

This approach overcomes the potentially messy cross-references which could arise if the style of (B) above was followed.:

ie. Williams, C see Brown, R, Williams C and George, T; Brown, R, George, T and Williams, C

As you could imagine the problem would be compounded further with additional authors or additional combinations of authors involved. This unfortunately is a very common scenario.

Another problem which arises is if you have a third paper in the same volume (or in a cumulation): George, T, Williams, C and Brown, R, 'Title of paper C' 558–68

To get around any potential conflicts and misunderstandings the best solution would be to use a *see also* reference and file it before the three-author entry, so that the index entries would appear as: George, T *see also* Brown, R [as though this was a single author entry] George, T; Williams, C and Brown, R, 'Title of paper C' 558-68

4. Confusion over authors' names

Extending our example from above:

Brown, R, Williams, C, George, T, Edwards, L, Smith, P and Stevens, A, 'Title of paper D' 705-13

Just reading the names quickly can be confusing. Are the authors R Williams and C George?

There is however, a simple solution to this problem. Use semi-colons rather than commas between the author's names, except for the last pairing where no punctuation is required as the names are separated by 'and'.

ie. Brown R; Williams, C; George, T; Edwards, L; Smith, P and Stevens, A, 'Title of paper D' 705-13

5. Should initial articles be ignored in filing?

When indexing book titles, eg. The first industrial revolution, the most common procedure is to invert the article, so the entry becomes First industrial revolution, The. This approach however is not appropriate for journal indexing. For example inverting the initial article in this paper looks ridiculous, eg. Vaccination status of Aboriginal and Torres Strait Island children in Far North Queensland, The It is much simpler to leave the article in the original position and ignore it in filing. This same principle is equally applicable for author/title entries where the titles are effectively subheadings. This only applies with prolific authors, but it is amazing when compiling an annual index the number of times multiarticled authors arise.

eg. Coulthard, Robyn Clinical nurses wanted (8):35

New future for Indigenous nurses (4):14–15 A time to reflect [editorial] (1):1

6. General or specific subject headings

There are two schools of thought on whether to use very specific main entries or to make the main heading broader in scope and include the specific detail in at the sub-heading level. For example, in a paper titled:

Health hazards from leaking anaesthetic gas in operating theatres.

The specific entry could be: Anaesthetic gas, occupational health risks

The general entry could be: Occupational health and safety anaesthetic gas pollution

Some editors have very fixed views on the use of general or specific headings, and one needs to be guided by their requirements. If no specification is given, a balance between the two forms is probably ideal. In the above example both entries would be appropriate.

This paper has highlighted only a few areas of journal indexing where the application of some professional knowledge can make a big difference to the final result. For indexers who have not moved into the journal indexing field, take the plunge, you may make a few mistakes initially, but your efforts will be far more effective than a lot of the journal indexes being prepared by outsiders.

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August Indexer '99 Second International Conference of the Australian Society of Indexers (AusSI) Hobart 27-29 August 1999

The Second International Conference of the Australian Society of Indexers (AusSI), sponsored by Indexing Research of Rochester, New York, was held in Hobart, Tasmania from 27 to 29 of August 1999. Fifty-three people attended, including delegates from Britain, America and New Zealand. Papers covered a range of subjects including website, database, bibliographic, book and journal indexing as well as the publishing world, metadata, and children's use of indexes. There were many contributors and parallel sessions were arranged to allow all papers offered to be presented.

Throughout the conference there were half-hour demonstrations of indexing systems: DB Textworks, HTML Indexer, Macrex, SkyIndex, and Cindex; the last presented by Frances Lennie, representing our major sponsor.

The keynote speaker, Robyn Colman from Quill Australia Pty Ltd, emphasised the importance of indexers providing easy access for the users of information; accessibility of information and the usability of the index are of paramount importance. Indexers need to advertise their skills to those who provide the information in whatever form it is presented. Robyn's issues were raised again by speakers throughout the conference. Glenda Browne (freelance indexer, Blaxland, NSW) discussed the need for indexers to network, and promote their skills; she provided valuable practical advice to those of us who are freelance, as did Alexandra Nickerson (Indexing Services, Cincinnati, OH, USA) who spoke on medical indexing. Frances Lennie (USA) provided useful information on revisions to existing indexes, web-mounted or in print, using indexing software. Two Victorian freelance indexers also addressed practical issues: Max McMaster spoke on journal indexing and Ann Philpott on the editing process.

Practical guidance for children using indexes was discussed by Anne Bentley (Moonee Ponds, Vic). An indexing outreach program, developed by indexers associated with Editorial Services in Annapolis, Maryland, USA, was described by Nedalina Dineva, on video. This program is geared towards educating middle-school students in the proper use and function of indexes. Janet Hillman (Mimosa Publications, Vic) spoke on the importance of indexes in the marketing of primary school products.

Our librarian delegates dazzled us with up-to-date information on new technologies. Maggie Exon from Curtin University in Perth, WA discussed the concepts of metadata (the word of the moment) and the need for human-centred indexing to provide efficient recall and retrieval of indexing materials on the web. Lloyd Sokvitne (Senior Librarian, State Library, Hobart, Tasmania) summarised current Tasmania Online experiences; this website received the Australian Society of Indexers Web Indexing Prize for 1998. Penny Braybrook (RMIT Publishing, Melbourne Vic) discussed Australian bibliographic database indexing. Two Australian databases were described in detail: Australian Tourism Index by Jane Odgers, and Australian Education Index by Margaret Findlay.

Lynn Farkas reported on two projects conducted by members of the ACT Branch which were funded by grants from the Australian Society of Indexers. One project culminated in the production of a brochure, a Guide to Indexing Services, which was duly launched; the other, a publication in draft stage, a Report and Discussion Paper on Education and Training of Indexing in Australia.

Alan Walker, President of AusSI, presented a paper on indexing school magazines and archives. Alan also chaired the session on Indexing Around the World. John Simkin (freelance indexer and bibliographer, Richmond Vic) described the recent Society of Indexers conference-with-a-difference (Canterbury, 16-18 July): there were distinct Chaucerian themes. Contributions from Britain, the USA, and New Zealand were given by Liz Cook, Frances Lennie and Simon Cauchi respectively. Alan Walker reported on indexing societies

in southern Africa and China — Chinese indexes are in columns and there is conventional order of characters. A number of speakers presented entertaining papers on unusual topics. David Ream (Leverage Technologies, Cleveland, OH, USA) described the creation of a website index to a ten-book mystery series in the USA — the Milan Jakovich novels by Les Roberts. Simon Cauchi (freelance indexer and editor, New Zealand) argued with great humour about the need for an exclusion policy for 'passing mentions' — who is OUT and who is IN. Prue Deacon (Commonwealth Department of Health and Aged Care, Canberra, ACT) discussed the problem of broad queries and narrow queries: can information systems cater for both? Geraldine Triffitt (AIATSIS, ACT) spoke of political problems of choosing indexing terms acceptable to both Aboriginal and non-Aboriginal people for databases and book indexes.

Tasmania was well represented. Robyn Mathison from Hobart reported on a group of enterprising women who have published books with some success and against all odds. Tony Large (freelance indexer, Ulverstone) amused us with the problems of indexing his own book. John Collins (St Helens) spoke passionately on the topic: Is there an Australian publishing industry?

A conference dinner was held during which Roy Harden Jones (Hobart, Tasmania) spoke light-heartedly of indexes worthy of note. Alan Walker presented the 1998 AusSI Web Indexing Prize to Lloyd Sokvitne and Max McMaster presented a certificate to Clodagh Jones whose index to The Journal of Annie Baxter Dawbin was highly commended in the 1998 AusSI Medal competition. It was a very Tasmanian affair.

The sun shone most of the time, and Hobart was looking pretty for our interstate and overseas visitors. We took over part of Hadleys of Hobart Hotel. There were welcoming and warming fires and comfortable accommodation. The Tasmania Shop provided a table selling Tasmanian-made gifts. Tee-shirts explaining that 'Life is easier with an Index' were on sale.

The Australian Society of Indexers thanks all those whose contribution helped to make the conference run smoothly and with success.

Clodagh Jones

ACT Report

ACT and Region Branch President Lyn Farkas talks about the conference:

The whole conference was considered to be very good; the numbers provided an intimate atmosphere and the venue added to the general feel of the event.

In particular all the papers were very good and general comment confirmed that view. The keynote speaker, who is not an indexer, provided a brilliant overview of the ways for the profession to go. The Hypothetical prepared by Anne Philpott was excellent and an envigorating experience for all.

Geraldine Triffett's excellent paper on cross-cultural work was considered very timely for our part of the world and was received with great enthusiasm. Socially, members of the Conference could often be found at the Salamanca Markets and the ACT group 'hosted' an informal session at Dr Mobbs.

From Barbara Malpass Edwards

Victorian report

Close to 60 registrants and speakers converged on Hadleys Hotel in Hobart to participate in a very stimulating and enjoyable long weekend. The Organising Committee was delighted to welcome delegates from the UK, US and NZ together with members of AusSI from all over Australia. We were especially pleased to meet up with so many Tasmanians interested in indexing and publishing.

Our special thanks go to Clodagh Jones, acting as 'on the spot ambassadress', making sure that all arrangements went along smoothly and introducing some new members to the Society. She, and her fellow Tasmanians, made sure that we all took home not only a very favourable impression of Hobart's restaurants, but also some souvenirs, purchased either from the hotel lobby showcase, the Salamanca Place market or the gift-laden stall brought into the hotel for us by the proprietors of the Tasmania Shop.

Each day's program was full of interesting speakers covering topics such as Indexing from an international perspective; Database indexing; Web indexing; Back of the Book indexing...and more.

Indexing systems were well represented with sessions on Cindex (our official sponsor); SKY Index; DB Textworks; HTML Indexer and MACREX all being covered.

The Keynote Address was given by Robyn Colman of Quill Australia Pty Ltd, who used the delightful title 'Quithering' to discuss the vagaries and delights of writing, publishing and word processing packages.

Throughout the three days of the conference we enjoyed many sumptuous morning and afternoon teas and lunches. After a full day's program on Friday we were treated to an hilarious presentation of a 'hypothetical' session, with Ann Philpott acting out her Geoffrey Robertson alter ego and coercing a number of folk to also take roles as author, editor, publisher, printer and obnoxious son.

Saturday evening's conference dinner saw us all looking very swish as we sat down to dinner in the decorated dining room. Roy Harden Jones was a brief but brilliant dinner speaker, after which the Presentation of Awards took place. The Society's Web Indexing Prize was won by the team of Lloyd Sokvitne, Liz Holliday and Elizabeth Louden for their construction of the website for Tasmania Online. Clodagh Jones was presented with a Highly Commended Certificate for her index to the text 'The journal of Annie Baxter Dawbin July 1858 May 1868' Ed. By Lucy Frost, publ. Univ. of Qld Press, 1998.

Sunday afternoon saw the exodus of the first lot of interstate and international visitors. Some participants took advantage of the mild weather and glorious Tasmanian scenery to extend their stays.

By Jenny Restarick