

Indexing: Engage, Enlighten, Enrich

Australian and New Zealand Society of Indexers International Conference

17-19 March 2005

Melbourne, Vic

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The Committee also received the final draft of the Information Architecture (IA) for our website, prepared by Helen Skewes and the Web Project Team from the New South Wales Branch. The NSW Branch has managed this project through the stages of surveying user needs and preferences, developing an information architecture, and usability testing it with key interest groups (publishers, indexers, etc). Glenda Browne (who acted as NSW Branch representative) provided valuable insights into how the Project Team arrived at some of their decisions; she will forward the Committee's comments and suggestions to the Team. Concurrent with the IA development, the Team has been coordinating new content for the site; our Web Manager, Jon Jerney, has reserved a new domain name and is investigating possible new servers. The next steps involve graphic design of the site, then programming the site to integrate the IA, the design and the content. As you can see, a new website for the Society is still some way off, but is progressing well.

A number of other matters were covered in the meeting, but by far the one that generated most discussion was the mentoring program. Three branches – ACT, NZ and Victoria

– are in various stages of implementing a mentoring scheme. Each Branch is moving in a slightly different direction, with points of agreement and of disagreement. Some of the issues that sparked discussion were the charging of mentees and payment of mentors, the linking of registration and mentoring, prerequisites for joining the program or acting as mentors, and quality control of the program. The Branch Presidents undertook to exchange procedural information on their individual schemes (eg, application forms, explanatory handouts etc), determine the core processes that should be part of a mentoring program, and report back to the committee with suggestions for establishing Society-wide guidelines for this important initiative.

As you can see, the outcome of three days of Conference meetings will be keeping the Committee busy on your behalf for the rest of the year. I hope this behind-the-scenes report of the 'hidden' ANZSI Conference has given you a feel for the issues facing our Society and how your Committee is dealing with them.

Lynn Farkas, President

INDEXING : Engage, Enlighten, Enrich

Reflections on the Australian and New Zealand Society of Indexers Conference, 2005

View from across the Tasman—a conference whirlwind!

Day 1

Keynote Speaker: Prof. Neil Archbold - 'Indexing: the user's perspective'

Prof. Archbold was a very interesting chap. He is interested in fossils and shells; a collector of coins and a user of catalogues and indexes, including a 'Biography of Russian Scientists' which took 18 years to complete and dumbfounded the Russians. Especially amazing as Prof. Archbold doesn't speak Russian, I thought. He has been there but only speaks a word or two. Incredibly mind-expanding address.

There were concurrent sessions in the Bridge and Yarra Rooms; some of the sessions that I attended were:

'Evidence-based Indexing' - Glenda Browne

I found this talk one of the most interesting of the whole conference. Glenda talked about the way we make decisions in indexing and how they are based on authorities, traditions, perceived user needs and research into user behaviour. She talked at length about studies that have been done on indexing and some of the findings were quite surprising. A particular gem amidst it all that I noted down was the suggestion to put the introduction or explanatory notes at the end of each page or in the middle in a box so no matter where someone enters the index, the reader will see it. Much food for thought here.

'Indexing archives for access' - Shauna Hicks

This was about a database of records of immigration to Victoria from British lists called Prov Online (Public Records Office Victoria). It is sorted by name, age, year and ship and

contains records between 1852 and 1923. It includes 1,820, 743 names and took 20 years to compile (no wonder)! They encountered many difficulties including reading old handwriting; crumbled pages and faded ink; changes in spelling; abbreviations; illiteracy; foreign accents; and anglicising of names.

'Mentoring scheme in Victoria: concept and development' - Max McMaster

Max outlined how the mentoring scheme has been set up in Victoria to provide trainee indexers with experience. A book for indexing should be usually around 200 pages, complex and in-depth enough, needing an index, and potentially saleable.

Mentors should not do any indexing and only give advice and guidance. The mentor/mentee interaction time is around 4-6 hours during a 2-3 month period (6 weeks was found unrealistic). After the first 40-50 pages, an electronic copy goes to the mentor to detect any problems early on. Once the mentor is happy with the index, it goes to the committee for approval. Registration is independent of mentoring.

So far there have been 5 mentees and 4 mentors, using a variety of material including historical, newsletter and church lists. There has been difficulty finding enough mentors.

Victoria branch started the pilot mentoring scheme and the New Zealand and ACT branches are also starting their own mentoring schemes now. Technical Writers want to adopt a similar scheme.

(continued overleaf)

'Mentoring scheme in Victoria: the mentee's experience' - Jane Purton

Jane has indexed two books and one newsletter. Some of the issues she encountered were using modern terms for modern readers; getting the structure of the index straight in her mind; and using page numbers not locators. The benefits of the mentoring scheme for her were indexing real jobs without the performance anxiety, advice on business issues, one-on-one help, and making friends.

Day 2

'Online annual reports' - Lynn Farkas

I was quite intrigued by this topic as in New Zealand there is no requirement for annual reports of a certain size to be indexed. We would have a lot more work here in New Zealand if there was! I certainly didn't know that you can win an award for the best annual report! The Institute of Public Administration Australia (IPAA) has been giving out Excellence Awards for 22 years with online awards going for 5 years. You have to be a printed award winner to be considered for an online award. Lynn has recently been asked to join the panel and has been emphasising the need for better indexing. There is a rigorous evaluation process and strict criteria to be met.

'Spanning the centuries through newspaper indexing' - Cheryl Hamblyn and Delyth Sunley

The McNab NZ Collection started as a gift of 4000 volumes which has now grown to 80,000. Newspapers were included in the original gift. The conditions of the gift were that it is free and open access to everyone, that it be added to, and that Mr McNab could still borrow his books.

The Dunedin Public Library began indexing newspaper clippings in 1936. In the 1940s enquiries doubled due to the Centennial and family history enquiries. In 1948, the *Otago Daily Times* and the *Evening Star* started being indexed daily onto slips of paper then written up by hand onto cards. The

index went online in 1993. Staff time takes 15–20 hours per week, indexing only local and regional stories or where things happen to Otago people. In 30% of enquiries, the index provides answers that can't be found anywhere else. There were 16,000 enquiries last year.

'Contentious issues in indexing panel session' - Alan Walker, Francis Lennie and Max McMaster

A great discussion this. Questions included how to treat scientific formulae; ship names; people well known under one name but mentioned in the text only under another; information supplied by the indexer but not in the text; undifferential locators in biography and history; complicated drug terminology; and affiliations in databases. I was a bit tired at the end of two long days but this discussion was quite sparky and kept my focus!

Overall impressions of the conference

If conference participants are a correct sample then indexers are generally older and female. Max told me once the average age of indexers is around 54. Looks about right.

The conference was amazingly well organised. The Victorian branch did it flawlessly! It was welcoming, not too formal, and efficiently run. I was impressed. Well done!

I found the conference inspiring, informative and certainly engaging. I would recommend that everyone tries to get to a conference at least once. What a wonderful opportunity to network with other indexers and meet like-minded people; to finally put faces to names; meet some of the committee, etc. Such an incredible array of different people doing such interesting things with their indexing skills.

I would have loved to see something on web indexing and the mysterious (to me) metadata that I still do not understand completely, but perhaps next time. It was a whirl and a rush, and I loved it.

Tordis Flath

A view from the ACT

Eight ANZSI members, all but two of whom had been to the conference, gathered in the Friends' Room of the National Library on 12 April, to share their impressions of how useful the conference had been.

Geraldine Triffitt, ACT President, thought it was a good conference, with a wide selection of papers and an interesting venue converted from old tramsheds, handy to the city. Seventy people attended, fourteen from the ACT, three of whom gave talks, and three of whom chaired sessions.

Shirley Campbell commented on Frances Lennie's Cindex workshop. She felt it was important to meet the creator of the system. Frances gave a broad brush presentation; she supplies excellent and prompt service to those using her system.

Day 1

Friday opened with the keynote speaker, Professor Neil Archbold. He gave a user's perspective, with examples of how he

used indexes to find information in geology and other sciences, not only in English, but in Russian and Chinese.

Then came concurrent sessions, Session A on indexing audio-visual material. Two members of the SBS Radio team spoke on indexing sounds in English and other languages for a multi-cultural broadcaster. They now have half a million tracks in languages other than English. Geraldine Beare had indexed *Punch* cartoons from 1890 to 1970 and Pathé newsreels in England, from 1919 to 1970. She has covered all the images in *Punch*, 250,000 in all, indexed under cartoonist, subject, colour, caption and locator. Indexing Pathé newsreels gave a multitude of headings and entries, covering world-wide news, using both American and English spellings. There was no hard copy, only computer discs for internal use and web availability.

Clodagh Jones was the last speaker in this group, on the industrial folk art of Tasmanian apple box labels. These were distinctive to each orchard, sometimes designed by prominent

artists. A private collector had the nucleus of the collection, but the editors of the book travelled throughout Australia to complete a catalogue of orchard history.

Session B began with one of the international speakers, Masoumeh Bagheri, discussing the development of thesauri in the 1960s in Iran, with the foundation of the Iranian Documentation Center, IRANDOC, the development of research centres and the Council of Scientific Research. Currently twelve Persian thesauri are available. Her sister spoke about indexing education in Iran, at present a course of two credit hours at Masters' level, part of the Master of Library and Information Science course.

Glenda Browne's talk on 'Evidence-based indexing' was voted one of the best at the conference. She feels we take certain reference material for granted as authorities, and should do more research into indexing and how users use indexes.

Sandra Henderson commented on Shauna Hicks' talk on indexing archives for access. The archives are huge collections, put together by various government departments; only recently have people become interested in access to them. This can cause difficulties in cases where the records are hand-written, perhaps with out-of-date spelling. Examples of some of the problems were shown on screen.

John Simkin spoke on the history of AusSI, of which he was a founding member, its aims and achievements, and suggested aims and objectives for future activity by the expanded society, ANZSI.

Geraldine then reported on the discussion on mentoring, by a mentor, Max McMaster, and a mentee, Jane Purdon. Max is currently the main trainer in indexing courses for ANZSI, and sees mentoring as a follow-on from his courses, possibly leading to publication and registration. He thinks both mentors and mentees should receive a small remuneration. Max will repeat his talk in July, to the Society of Indexers conference in England; their response to it will be interesting, as they have established courses and assessment procedures. Jane Purdon had been a registered indexer, but gone on to do different work, then came back to indexing, becoming a mentee to regain confidence.

Jean Norman commented on Cambridge University Press's XML system of indexing, where the typescript is indexed to the word, not the paragraph. The index can be produced in several ways, but the work is slower.

Shirley Campbell reported on the ANZSI Special General Meeting. This group formally approved the amendments to the Constitution, which have now been published in the newsletter. Some will go in as Administrative Decisions. One important point, now that we are allied with New Zealand, was on the form of meetings. 'A meeting need not be face to face, but may be electronic or in some other format.' All the amendments proposed by the ACT Region Branch were passed. Also, the recommended rate, one to cover the whole society, was set at \$55 per hour.

The conference dinner was pleasant and well organised, with a seating plan, one committee member at each table competitions and musical interludes. During the dinner Tordis Flath, the New Zealand President, was awarded the Indexers' Medal for 2004.

Day 2

Saturday began with two Canberra speakers, Eleanor Whelan speaking about Australian input to the Aquatic Sciences and Fisheries Abstracts (ASFA) international database, and Tessa Wooldridge speaking about AustLit, the Australian Literature Gateway, a cooperative effort by eight libraries of literature of and about Australia, including the effects of overseas authors on Australia.

Lynn Farkas then discussed on-line annual reports; she is a member of a panel evaluating these.

Tordis Flath considered different ways of indexing journal articles. Glenda Browne has already contributed a report on this discussion, which was published in last month's ANZSI newsletter.

The next session dealt with indexing in the education field, with Margaret Findlay discussing contemporary indexing, Pru Mitchell and Fiona Marriner talking about the South Australian system, EdNA Online, and Emeline Haight talking about open access information.

Cheryl Hamblyn and Delyth Sunley, two New Zealand members, spoke on newspaper indexing, describing how this type of indexing can span the centuries and be important for local knowledge. Geraldine Suter discussed *The Argus* indexing project. *The Argus* closed back in 1957 and some parts had been indexed previously. The project to consolidate previous work is now web-based, though not full text, with participants from NSW and the ACT as well as the major Melbourne libraries.

Geraldine Triffit chaired a session on the indexing of indigenous materials. Nel Fredericks spoke of the projects undertaken by the State Library of South Australia, such as a register of births and deaths, various mission records and family collections. Dianna McClellan spoke on metadata for indigenous cultural heritage; she was involved in the Australian Indigenous Heritage Database Project at LaTrobe University. Her talk covered many topics and showed how subject headings and metadata could be used but weren't. AIATSIS was praised for its work.

Finally, a panel composed of Alan Walker, Frances Lennie and Max McMaster examined contentious issues in indexing. Questions covered filing chemical terms, the names of ships and their dates of arrival, qualifiers for names, the use of *passim*, and the number of locators needed.

Lynn Farkas, ANZSI President, closed the conference, but for the Committee things didn't stop there. On Sunday a half-day post-Conference meeting brought together the full ANZSI Committee to discuss a wide range of issues affecting the administration and future of our society. This meeting has been dealt with in detail by the President, in her column.

The consensus of the ACT group was that the conference was successful and useful. We just wished there had been even more opportunity for international input. Perhaps next time...

Edyth Binkowski

ANZSI NEWSLETTER

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ANZSI Conference 2005: Engage Enlighten Enrich

by: Kathryn Mercer

As I am relatively new to indexing, the 2005 conference was the first related to indexing I had ever attended. The small number of attendees was a bit of a surprise, but it was good to put faces to names as well as having the opportunity to meet many new people from a wide variety of indexing backgrounds. It also felt a little odd to finally meet the New Zealand Branch president on Australian soil!

I work mainly in the heritage sector, so the wide variety of papers, including many with a historical flavour, was very relevant and much appreciated. Outlined below are the ideas I found most useful and interesting.

The first of these was Prof Neil Archibold's keynote address, giving an intensive and enthusiastic user's perspective. It was great to hear that he believed indexes are 'critical tools for the organised researcher.' In the sciences, a 'glindex' is a most useful tool – a combined glossary and index. He pointed out that using full names is appreciated, particularly by science historians, as are cross references from variations of names and titles: in his research, key figures often have both a Russian and an English version of their name. In an academic setting, research into particular issues occurs globally, and he made a plea for more multilingual indexing to facilitate information sharing and research development. Indexers working with a specialist research audience should ideally know not only their subject area but also which countries are most intensively involved in relevant research, whose researchers may also find the index useful. Hopefully publishers will also take his message on board. As indexers, there could be value in building international links to facilitate indexing in multilingual teams, if we are not multilingual ourselves – food for thought.

It was pleasing to see that many papers were about indexing media other than the usual books and journals. Cheryl Magee and Joann Keogh's paper 'Indexing sound (English and other languages) within

a multilingual broadcaster' was based on their experiences at SBS Radio, Melbourne. SBS programming is (very) roughly similar to that of government funded Community Radio in New Zealand. I thought the paper would discuss indexing interviews etc, but the collection is primarily music – which as we discovered has challenges enough! The collection is arranged geographically. Even basic information such as identifying which country/language is represented can be perplexing, so indexing is often done in conjunction with the announcers who have familiarity with the language and fonts. A separate collection of production music is used in the background or to introduce segments, to create mood etc, and this has its own index.



Kathryn Mercer

An experienced indexer based in the UK, Geraldine Beare gave an interesting account of her experience indexing the illustrations and cartoons in *Punch* magazine and a separate project indexing *Pathe* newsreels. Her contract with *Punch* magazine took her three years around other work, indexing all images including mastheads, resulting in an index with around 250,000 entries in an in-house database. She obviously found the work very stimulating, including not only entry points such as cartoon captions (most had to be abbreviated), but

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Contributions to <newsletter@aussi.org>

ANZSI Conference 2005: Engage Enlighten Enrich (cont.)

also literary illusions – sometimes to earlier *Punch* cartoons. A broad general knowledge would have been invaluable in such work. The cartoonist's name was a key index term, but many did not sign their work, some using initials and monograms. Her intensive work meant that she often got to know the style of the various cartoonists. Another issue, due to the long time period covered, was changes of name of both individuals and countries, and here she opted to use the term used in the source material. Providing consistent locators for unnumbered supplements was another challenge.

Pathe news reels were produced between 1917 and 1970, so again the material covered a long period with lots of change. Unfortunately Geraldine was only given 18 months to complete the project, so there was not enough time to view all the films and no cross-references were provided. Consequently, she indexed mostly from a catalogue. However entries were in both UK and USA English, ending up with over 200,000 entries. Some entries involved research, for example references to the Duchess of Kent – which one, and what was her full name?

I am passionate about improving access to ephemera as rich historical source material, so it was with great interest I listened to Clodagh Jones' talk, 'Industrial folk art of apple box labels'. It was soon apparent that she had also caught the ephemera bug! She did not realise what she was getting herself into when she agreed to index the book, 'The art of apple marketing'. The book included 85 pages of text followed by a catalogue of almost 600 labels from across Australia and appendices of artist biographies and lists of printers. Her initial brief was to index the text section only, but as she learned more about the project she persuaded the authors that an index of the full work was vital to its usefulness, not just for information about the apple marketing industry but as documents of the social history of the time – many label images had no apples on them, but showed birds, fashion, transport, etc. She ended up creating several indexes, including brands, artists, printers and exporters, greatly enhancing the usefulness of the work. And what didn't she index? Apple varieties (which surprised me, what with the interest in heritage varieties) and apple grades. Working with two authors sometimes made it difficult to get timely decisions, but the end result was well worth it.

Shauna Hicks, of the Public Records Office of Victoria, gave us an archivist's view on indexing in a session titled 'Indexing archives for access'. Her archives hold 83 km of records, dating from the 1830s and some of the indexes are online <www.prov.vic.gov.au>. She pointed to a lack of standardisation across Australia, including the time periods for

which private data is restricted. In her experience, archival terminology is of decreasing importance due to the increasing use of keyword searching by users. Challenges of indexing archives include working with handwritten information, illiterate informants, variant spellings, abbreviations and the Anglicisation of names. Name-identified data has tended to be of most interest to the majority of researchers, but is also the most time-intensive to create. Archival description is often very basic (generally due to time/money constraints); so much of the indexing of records is by the Australian Federation of Family History Organisations, which is working on producing a comprehensive list of indexes. This provides better access to the material for family historians, while generating income for the organisation. A few hardy individuals also index the material and then sell it on, which piqued my interest.

John Simpkin's 'AusSI: aspirations and achievements since 1976' gave an overview of the development of the society – a history he cheerfully admitted was less than dramatic. The 1979 register of work-in-progress sounded like a useful concept.

Few participants appeared to have used Cambridge University Press's (CUP) XML based indexing system and the paper pointed out both the potential from the publisher's perspective as well as the challenges from the indexer's perspective. The lack of standardisation, even within CUP branches, will not help take-up of the system. Indexing happens in a different stage of production, but the process means that the index becomes independent of media or format, as the index can be regenerated when text is altered. So while the index takes 10–200% longer to produce, it also seems to mean that indexers will not get any additional work when reprints in different formats are required. The system of anchor numbers rather than page numbers has some similarities with the system used for producing indexes for the Harper Collins atlases, discussed in the latest edition of the 'Indexer' by Jim Irvine.

As a shopaholic, it was a little frustrating being on Bridge Road (known for factory outlets) without time to visit the shops. Perhaps others felt the same, or there were more non-members at the conference than I had realised, as numbers were considerably thinner for the afternoon AGM. The discussion on the differences in indexing charge-out rates, both within Australia and across the Tasman, was interesting: I wish I had heard this a year ago. Working in a global environment has increasing challenges, with indexers generally not being paid according to the level of skill and knowledge they bring to their work. In the UK environment, the Society publicises a minimum recommended rate, with both page rates

and hourly rates used to price work. There was discussion around charging rates according to the country the publisher is based in, e.g. charging an Indian publisher the Indian rate.

I did not attend the dinner, but judging from the noise when I returned to the hotel after enjoying exploring a little of the central city by tram and foot, it was a fun night. I suspect I wasn't the only one not exactly bouncing out of bed on Saturday morning, although the substantial hotel breakfast washed down with lots of coffee did help to perk me up ready for the 9 am session, 'An electronic cottage industry: Australian input to the Aquatic Sciences and Fisheries Abstracts (ASFA)' presented by Eleanor Whelan. This session was as much about being a person who works from home (complete with the pyjama factor), as the Abstracts and the 'fishnet librarians' who specialise in marine sciences. It was great to hear Whelan's ten steps for success, and her confession of the gap between intention and action. It was nice to know that others find cash flow difficult to predict in this business.

I then swapped sessions in order to listen to the debate about journal indexing, particularly of multi-authored articles, led by Tordis Flath (by then a medal winner) and Max McMaster. It was interesting to see the range of opinions and experiences expressed. It appears that only some journal articles list the primary author of group authored articles first.

Geraldine Suter described perhaps the largest indexing project in Australia: indexing the *Argus* newspaper. Lack of a newspaper index denies the community access to its own history. Recognition of the lack of a published index for a major Australian newspaper has driven the project which aims to publish online. Funding has made a big difference to the speed at which indexing is progressing – approximately one decade of papers indexed every two years. However, this has been at the cost of excluding indexing advertisements, regular sporting fixtures and material covered in government journals from the index. The project involves around 40 people, a mixture of volunteer and paid staff. It acts as both a digest and an index, telling a story in its own right. While some 19th century terminology is incorporated, some 20th century concepts are also included as they are highly researched, eg discrimination. This adds considerable value to the index, as free-text searching will not bring these concepts out. It was a very useful overview of a major heritage indexing project – the model could be adapted for other projects of a similar nature.

On a similar theme, Cheryl Hamblyn (who I'd met a few months before at the Rare Book School lithography course in Dunedin, NZ) and Delysth Sunley discussed the Dunedin Public Libraries' newspaper indexing project. It was clear how much they enjoy their work. The knowledge they have built up of local history through their indexing has made them espe-

cially valuable staff in their reference library work. Their paper incorporated a history of how their index came into being, closely tied to the ebbs and flows of New Zealand's interest in its own history. This aspect provided useful context for some of the research I have been doing.

The following two sessions dealt with issues around access to indigenous materials. Nel Fredericks described a project she oversaw at the State Libraries of South Australia to provide more user-friendly access for indigenous Australians to some mission archives relevant to tracing family histories. The focus on the users' existing knowledge, expectations and needs resulted in no *see* references and the 'year' equalling birth date rather than the year of the entry in the register: great to see the users needs being put first. As with the earlier archives session, privacy issues affected coverage. Cross-referencing names to a published book of biographies added additional value to the records, reminding me of a similar practice in some museums.

Dianna McClellan of La Trobe University produced a somewhat overwhelming overview of the rich range of information in various formats collected predominantly by university archaeology and anthropology departments. She described attempts to provide improved and appropriate access to this information for researchers and/or the indigenous peoples themselves. The wide variety of approaches highlighted the lack of standardisation and fragmentation of information – and the need for a guide or overview as attempted in the presentation: Dianna McClellan packed in a lot of information.

I had my flights to catch, so I missed the last session on contentious issues, but I nonetheless left with plenty of food for thought. And weren't those conference tee shirts great?!

Kathryn Mercer, catchwords@clear.net.nz

(Kathryn was awarded the 2005 ANZSI Conference sponsorship)

About Kathryn:

Kathryn's interest in history, archaeology and material culture was stirred in childhood when, digging up the lawn to establish a new vegetable plot, she turned up old broken china and a chamber pot. These interests led to researching early New Zealand scientific communication with the associated challenges of finding relevant materials in museums, archives and libraries. After several years working as a librarian, Kathryn started her own business, called Catchwords, providing research, advice and improved access tools for the heritage sector. Projects thus far have included using the inaugural Nielson Book Data Research Award to investigate retrospective monograph indexing, coordinating some indexing training with a heritage flavour, researching historic sites, advising on the potential future of a Crown Research Institute's image collection and assisting with the digitisation (inc. indexing) of a government department's historic photograph collection.