

Intrepid indexing: indexing without boundaries

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From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

Intrepid Indexing: From the Sea to the Stars:

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Thank you all and a special thank you to ANZSI's Conference staff for bringing me down under to be here. I am so happy to be in New Zealand to talk to you today.

Welcome to all Intrepid Indexers, and to publishers, editors, and writers who are here to join us in discussing indexing. It is great to see you here, and I hope this conference will be a lively discussion of indexing in all of its facets.

Intrepid indexing is such a wonderful theme: the synonyms for Intrepid are "fearless" and "brave." There's also a touch of adventure in the word, at least to me. A sense of choosing to go forward bravely and a bit of excitement as well. It sounds like a ship we are all on, making ready for a journey.

We are on a voyage in indexing. The past 30 years have changed indexes and indexing radically.

Some of us in this room may remember doing an index using 3x5 cards in a shoebox. I entered the field when there was already specialized software, and indeed my work has been very technical in nature. But my indexing instructor, Nancy Mulvany, made me do an index with cards just to get the idea and experience. I love software.... because I have typed many a catalog card for the libraries I worked in long ago, and I can remember when the self-correcting key on a typewriter was the best new thing ever. My voyage has taken me through mainframe programming, library work, the dawn of desktop publishing, the dawn of embedded indexing, the dawn of online-based indexes, and I have been working with the monitor or screen as the main display for my indexes for two decades. What a voyage it has been!

Indexing is an ancient art whose time has not yet come: Lise Kreps, 1990

My friend Lise said this to me as I was considering becoming an indexer back in 1990, and it is true still today. I have been amazed at how this comment has continued to be relevant.

Indexing has gone through technological changes rapidly, and we have seen genuine challenges to its purpose and meaning in the post-Google world. But indexers have been intrepid and risen to each challenge, and I think the time is coming.

Indexes have gone from cards to sophisticated software, from print galleys to PDF files and XML files. Indexes are evolving from a “good thing to have in a print book” to an essential tool for people to use to discover books in a world lacking bookstores and easy browsing. Indexes are a unique thing: they are navigation, they are metadata, and they are a way for people to choose what content to purchase. Indexes are transitioning to a page-free environment, and are now tagging aboutness at the paragraph level and perhaps down to the very word. As indexers, we are merging and mashing up index data across publications, mixing and matching content indexing, and fine-tuning it for search engines wise enough to use it. In some handheld apps, the index is the first thing you see. In all too many ebooks, though, the index is missing or inactive, and that must change. For the last two years, we have been working hard internationally to change that state of affairs, and I feel we have had some amazing successes.

At the recent Tools of Change Conference in New York, “index for discovery” was one of the top five buzzwords for the conference. For those of you who may be unfamiliar with Tools of Change, it is the conference where the bleeding edge of publishing and the leading influencers of econtent gather each year. For intrepid voyagers like us, Tools of Change has been like receiving a grant from a geographical society, allowing us to take our explorations further and publicizing our successes. They have invited us to give presentations and workshops for two years now. Publishers are now realizing that our metadata is a tool that can help people find and buy content.

But we still have a lot of challenges. They could be merely ice bergs or small engine breakdowns along the route, or they could sink us. We have some navigating to do and need all hands on deck.

Staying Intrepid

In order to survive these changes and keep the work we do and the metadata we provide accessible to publishers, we have to do several things.

In essence, we need to:

Stay on top of new technologies: keep informed of new software and tools, and explore them.

Act as advisers to people implementing technology: often we are seeing new programs for creating ebooks or econtent that confuse indexing with tags, or are not designed to make it easy to read the index or write it. If we can get in at the beginning, we can advise on these issues.

Adapt ourselves to new ways of working: how can we make this easier, faster, or less buggy?

Provide advice and workflow processes to our clients in more detail than we have been: when we know a tool inside out, its tricks and whimsies, we can advise clients adopting it. We can also guide how indexes should be written for

different interfaces and presentation modes. Paper is just another interface, and we need to look at each interface's limitations and strengths when we write for it.

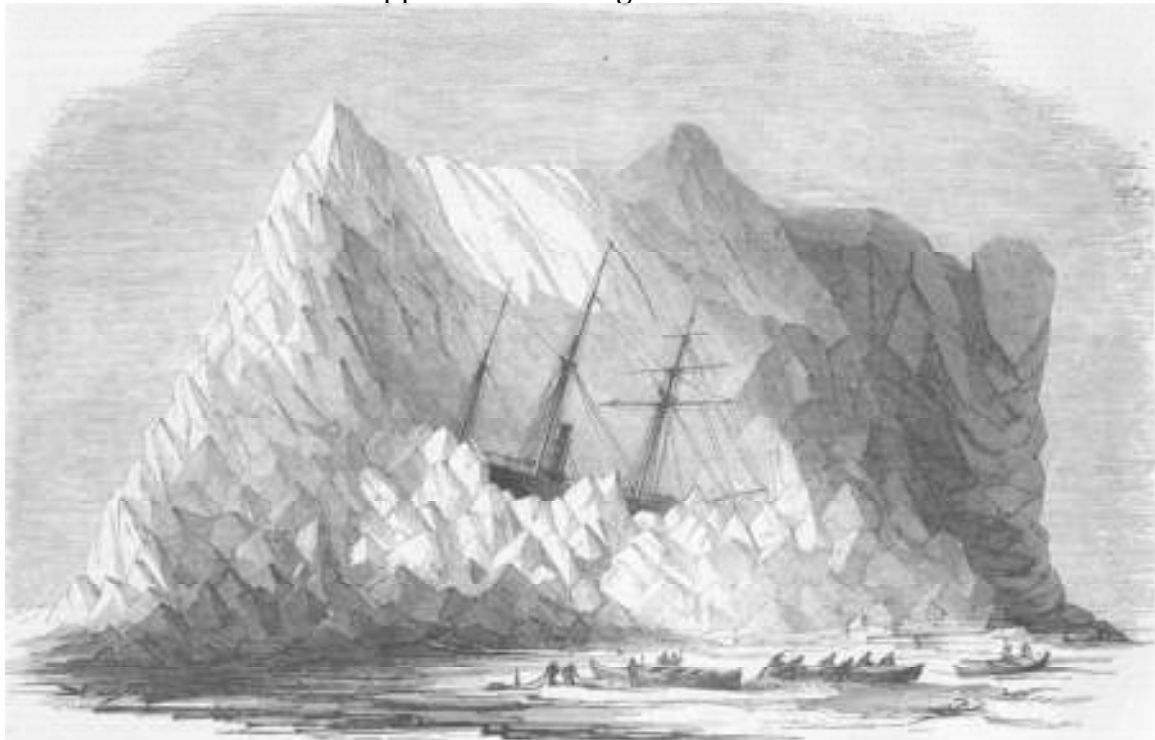
And of course, be fearless and brave on the voyage! Here be dragons, but our ship can get through with a good crew.

Intrepidly exploring

There have been many ships named Intrepid, and it is a long and honored name on the seas. It says everything you think a ship should be. Fearless! Brave! And again it has a sense of adventure about it.

If we think of ships as indexing technologies, we can see we are on a voyage from the sea to the stars.

But we don't want this to happen to us as we go forward.



This ship, the HMS Intrepid, was involved in the hopeless search for Lord Franklin in the 1850s. Do you all know about Lord Franklin, who was an Arctic explorer and a former governor of Tasmania? It is an amazing story of exploration, loss, mystery, sacrifice, and a woman's love. I'm hopelessly addicted to reading about such voyages, and Franklin's is one of the most dramatic.

Lord Franklin's expedition to find the Northwest Passage disappeared in the Arctic after setting sail in 1845. After two years and no word or sign of the ships, Lady Franklin persuaded the British government to send a second expedition to find Franklin, which resulted in its own disasters. The HMS Intrepid was part of this rescue expedition of 1850. The crew actually found some remains of the

Franklin expedition, but Intrepid itself was caught in the ice and had to be abandoned, its doom coming when the ice crushed it in the cold. The crew survived. Over the years, the quest for Franklin became an obsession, and Lady Franklin's Lament became a popular song. Here's a bit of it for you. (Small snippet of music) Haunting, isn't it?

But we can be sure that our explorations in indexing don't get trapped in time. We can go beyond only offering indexing that works in print media. We have to use technology and workflows to keep us from abandoning the ship in the ice, or being frozen in time. I've heard from people that indexes are dead. It's not true, and we are not caught in the ice.

Intrepidly changing

And that is because we are Intrepidly changing.

As a metaphor for adaptation and change, let's look at another ship. The USS Intrepid was built in 1943, served in World War II, was modernized and recommissioned in the early 1950s as an attack carrier, and then eventually became an antisubmarine carrier. She was the recovery ship for two space missions. Her interior and exterior fittings have been changed, shifted, modified, and reworked to meet every new mission she took on, and she served well through it all. She is now docked in New York City as a floating museum and a cultural event center. She provides a home for one of the US space shuttles, and has even served as a concert venue: you can get a lot of people on that deck!



Survival and adaptation means taking a basic structure, whether it is steel or in our case – our knowledge of metadata, related terms, synonyms, usability, findability, aboutness -- and evolving it. We refit indexes the way the Intrepid's decks are refitted. The underlying structure is our knowledge. The outer trimmings and formats can change.

Adaptation also means welcoming new technologies on board, lifting them out of the sea like a space capsule, and sharing data out. It means that like the concert goers and the museum visitors, we have to invite others on board. There are a lot of people indexing who are not members of our societies: writers, editors, authors, small and large publishers. We can give a "concert" and share our best practices, techniques, and theories to ensure indexing is being implemented well. When we figure out new methods and workflows, we should be acting as

educators, advising on processes, using our unique steel foundation of knowledge to offer up ideas and methods we know will work well.

Intrepidly into the future

And then let's go to the stars. As we go forward into content everywhere, on paper, on small screens and large, let's relate it to voyaging in space, that final frontier. Any of you in the audience who are Star Trek enthusiasts will recognize the USS Intrepid (NCC-1631). She is a Federation Constitution-class heavy cruiser that will be in service with Starfleet in the mid-23rd century. If we could go forward in time, we would find out that this ship will be crewed almost entirely by Vulcans.



Now, when you think of Vulcans, what do you think of? Mr. Spock, of course, but what does he represent? Logic, order, genius. A member of a systematic culture (except of course during mating season, but we won't talk about that). Spock was always prepared with advice, precisely-sourced advice. He had good data available to search, and could extrapolate from it. In Spock's world, the computer handled many tasks, but it was the human/Vulcan mind that always pulled the facts together, linked the connections, and made the decisions. He linked knowledge into solutions.

As we go into the future, what better metaphor of what indexes and indexers can be than this? We are advocates for findability, retrieval, access across platforms and literally across the galaxies of knowledge.

Intrepidly thinking

We are talking about Intrepidly going from the sea to the stars, and I hope you will permit me a small bit of word play and a little disambiguation. It's a small

diversion. The stars mean space, of course, but the word also means celebrities, or in this case, actors. So we must disambiguate those two meanings, as I have done here...

As for stars in its second sense, the next Star Trek movie will feature Benedict Cumberbatch. But this star is also well-known as the current fabulous Sherlock Holmes in BBC's contemporary Sherlock series. Sherlock himself represents the indexer's keen grasp of clues, details, and aboutness: he's analytical, he pulls hints and themes together, he links knowledge into solutions. Now if only I could get him onto a ship, my metaphor would be complete. But this is a digression...

Indexes going forward

Enough of Mr. Cumberbatch's cheekbones (and wouldn't that be a lovely entry to write?).

Indexes going forward are serving many purposes, and we must work as a team to keep these themes as our goals.

Navigation: In print, indexes are more important than ever as navigation tools, especially to younger readers who are used to having Search at their fingertips. The only search-like feature in paper-based content is indexing, so it is critical for nonfiction to have indexes to meet the needs of younger users. Yes, we have tables of contents, but that is the author's structure. Authors categorize things from their own point of view, and two people rarely categorize things alike. And, the table of contents presents a hierarchy that a reader must work down. The index serves democratically as everyone's access, so that we don't need to think just like the author and guess. As one author told me recently, "This is print! We will have no Search. We have to have a good index!" The new EPUB3.0 Indexes Working Group standard will allow us to markup indexes so that they can play a big role in navigation onscreen. eBook hardware and software can make use of this new markup to make the indexes work easily, and provide users with new ways to get to online text. Specialized navigation from the index and easy accessibility to the index will make a big difference in the reader's search for information.

Metadata: We should work towards expanding the external metadata set for each published work and have the index included as metadata for a book. We are seeing ideas being floated about including the index as a metadata field in standards such as ONIX. Having that data available for download by all websites selling a book would be amazing. That would let people actually see the contents, the backbone or spine of the book, outside of it. Publish the indexes for free, and let them work as metadata, mixing, matching, mashing up. Making indexes public outside of the book or file means we can merge and mix the data set for one publisher's offerings, or across a subject, leading to a lot more visibility for content. Hugh Maguire published an article recently that states that the index is the API for a book. API means application programming interface, or the way to link into code from another program. Facebook publishes its API, Twitter does as well: that is why you see little buttons for them on web sites. The web site is

using the API to link into Facebook functionality. Saying that the index is the API for a book means we should be using it to link into the concepts presented in a book. It's much like my friend Carol Brown told me long ago when she was working in technical documentation for a software product. She said "I think you should index the product itself first, and then let me write the documentation from that." We are turning the idea of the index on its head, from last thing in a process to perhaps the first thing in a process.

Continuum: Providing indexes for free, or merging them and publishing them, will lead to work in standardizing vocabulary and formats. If our indexes must work as external metadata and be mashed up with other indexing, we will see more controlled vocabulary use. Print book indexing can remain a free form art, but we are going to see more instances where the index may be used in a metadata set, and therefore may need to be more strictly structured in its vocabulary and formatting. We have the skill sets to build anything from an index to a taxonomy to an ontology to a mind map. All we need are the format requirements before we start, a path, and we can adapt. I love free form indexing myself, but in a world of mashups, we will probably need to standardize vocabularies for a publisher or a subject, so that it can be used in many stages and formats.

Discovery: Those merged datasets, when made public for searching, can also lead more readers to the books and content they need. Browsing and searching both individual and merged indexes can lead to more content sales. Pulling together and selling an ebook on the fly based on a keyword search a buyer has done, leading users from a hyperlinked index to the source to buy the book with particular entries in it, these are all functions that indexing can play in the discovery of materials. Publishers should consider including the index in any sample downloadable chapters. Let your readers know the full contents of the book in your samples: it's easy to include the index, and it will tell them more about the book. Discovery when there are so many competing pieces of content has become critical to publishers. As I mentioned earlier, "index for discovery" is one of the top five buzzwords from Tools of Change this year, which means many bleeding-edge technologists like this idea. Let us help distinguish your content and its depth in a search by providing good indexes.

Voyaging on, intrepidly

During this conference you will be absorbing a lot of new index technologies and workflows. Just being here means you are staying informed, but do actively seek out more information. These days, a lot of it is on Twitter – and it is hard to believe how much a tool like Twitter has advanced indexing's cause. In two years, people tweeting about our presentations, using social media to stay in touch after sessions, asking questions during special twitter hours, and keeping people informed on index issues and news has rolled the American Society for Indexing's Digital Trends Task Force into meetings with Adobe about InDesign's

indexing issues, or the IDPF Indexes Working Group effort, or contacts at companies who are working on ebook software, or contact with companies who want to see indexing implemented, and much, much more.

As groups like ASI's DTTF and the Society of Indexer's Publishing Trends Group reach out to device makers, software companies involved with ebooks, print and publishing, you can help by identifying publishing companies working on new workflows and reaching out to them. You can help us by notifying us of new technologies you run across. You can help by testing software, or quality checking book output. Index indenting in particular is an iceberg. Post online, tweet, publish your findings.

Don't wind up frozen in the ice: learn what you can and adapt. In my own practice, it is rare now to get a "normal" book project. My clients and I have to work through what software and process workflow they are using to publish, and how to get the indexing to work in all the outputs they need. It's rare for me to have a simple back-of-the-book project, and has been for several years. That day may come for you, sooner than you might think. Be ready for it. Just-in-time production has been long a practice in goods and materials: can we be looking at a future where just-in-time indexing can happen because we have been on the project from the very beginning, and indexing simultaneously? I've done this as well, and it may be a problem we need to work on.

Be ready to help educate your clients about their choices and advise them early in their publishing process. As you will find out, ebooks and econtent mean making choices in the workflow early on, because we have to know what will work for each output. We need to make it easy for publishers and writers, and we also need to realize we may not be doing the indexing. Boot yourself up a step by becoming a consultant, writing guidelines, documenting workflows, testing tools and their index outputs, writing controlled vocabularies, and teaching indexing concepts so that others who may be doing the indexing have your professional guidance.

Be brave. We are all in this together, and we are creating it as we go along. Think of all indexers as member of the crew. There may be people with more experience in some tools, there may be people with less, but we are all here together, and we have to work together, give advice, and ask each other for help in order to make indexing stronger. Lise thought that indexing's time had not yet come in 1990. I think it's time has come now. So go boldly where no indexer has gone before and ask questions at the start of the project. Ask other indexers for advice and input. Keep the task forces up to date on news you hear, so we can all learn together. We all need your eyes, your ears, your input and your intellect.

And above all, be Intrepid! The ship is sailing now, and we are on board!

Appendix: *Lady Franklin's Lament*, traditional: the best and most haunting performance was by Mícheál Ó Domhnaill and Kevin Burke, and can be heard at <http://bit.ly/XKXEDx>

We were homeward bound one night on the deep ☐
Swinging in my hammock I fell asleep ☐
I dreamed a dream and I thought it true ☐
Concerning Franklin and his gallant crew

With a hundred seamen he sailed away ☐
To the frozen ocean in the month of May ☐
To seek a passage around the pole ☐
Where we poor seamen do sometimes go

Through cruel hardships they vainly strove ☐
Their ships on mountains of ice were drove ☐
Only the Eskimo in his skin canoe ☐
Was the only one that ever came through

In Baffin's Bay where the whale fish blow ☐
The fate of Franklin no man may know ☐
The fate of Franklin no tongue can tell ☐
Lord Franklin with his sailors do dwell

And now my burden it gives me pain ☐
For my long-lost Franklin I would cross the main ☐
Ten thousand pounds would I freely give ☐
To say on earth, my Franklin do live

Resources

- American Society for Indexing's Digital Trends Task Force (DTTF):
<http://bit.ly/rFp0Re>
(Many links from this page)
- Converting a Legacy Print Book to an EPUB with Pinpoint Index Linking –
Keywords V. 20 N. 3 July – September 2012
- Linked in News on Indexing and eBooks
<http://www.linkedin.com/manageGroupMembers?dispParts=&gid=4005509>
- EPUB3 Indexes Working Group <http://bit.ly/YVkBHK>
- Legacy indexes: Talk to Dave Ream at <http://www.levtechinc.com/> or
DaveReam@levtechinc.com
- Twitter:
@ASIndexing
#indexing
#dailyentry
@isc/csi
#windexing
- #ePrdctn hour (every Wed morning, 4 PM UTC, or UTC minus 5)

ANZSI Conference, March 2013

Wednesday session: Publishers, Editors, and Indexers: a panel discussion

The session began with each of the participants speaking individually.

Fergus Barrowman commented that:

- As a publisher he is aware of the criticality of indexes as a way into books
- In terms of the future of e-publishing, many publishers are waiting to see how the associated business and technical side of this type of publishing will develop
- The custom of the author paying for the index will continue
- Some authors do produce their own indexes
- Is in favour of indexes being acknowledged in a book
- It is true that publishers view indexes as time consuming and as taking up space in a book
- The financial pressures are a big issue for publishers
- Indexers working with authors would be ideal
- Bringing in indexers earlier into the production process is difficult to achieve, though project management makes it appear this should be possible. Invariably, though, the project encounters hiccups
- Indexes are reviewed and sent back to the indexer after review

Simon Minto commented that:

- There are similarities in the skill set of editors and indexers, i.e., attention to detail and general knowledge
- Reference works, in particular, live or die by an index
- Some indexes are impenetrable, e.g., the *Chicago Manual of Style* index
- Indexers and editors are invisible contributors to books (though sometimes, if things don't work out well, this can be a good thing!)
- Indexers should ask to be acknowledged in books
- Indexers are reviewed, though this might just be a random, or spot, check
- Editors will also index books they have edited

Mei Yen Chua commented that:

- Indexers are most often at the end of the publishing chain, and are 'squeezed'. Also they are often given restrictions on page length, etc
- It is a shame that authors and indexers don't communicate more
- Occasionally, authors have given feedback and said that the index made them aware of material in the book they had not realised was there
- Commenting with authors can cost an indexer time and money
- Marketing personnel now have more of a say in how a book should be indexed, e.g., that the indexer include US and British English so the book can be marketed more widely
- Sometimes editors lose their jobs and are replaced by people with marketing skills

- Indexes can be sacrificed for book design. In one case, an index was squeezed into four columns so that decorative balloons would be displayed on the page edges

Audience comments:

- Indexers vary in the time they are given to complete indexes—from one to two weeks, to one month
- The lists of topics that authors sometimes produce are not always useful for an indexer
- In the US, marketers also influence indexing. Indexing as a marketing tool can be viewed in a positive light, and it is a good thing if marketers realise the value of indexing as an advertising tool
- In Australia, especially in the trade book field, there is not enough time to talk to authors. This was countered by a comment that in the medical field in the US, there was a lot of cooperation, as people realise they are all in the process together
- The indexing environment is changing, and more of a team effort is required. For example, indexers could be marketing their skills by offering to consult for authors
- Some indexers were frustrated at not knowing how many pages they were allowed to have for the index, and sometimes whole subjects have had to be taken out to fit into fewer pages
- Some editors are helpful, especially when they provide the indexer with a detailed brief. One indexer says if he doesn't get a brief, he writes his own and sends it to the editor.

Māori Names – Robin Briggs

Haere mai. Welcome.

I'm Robin Briggs. With me are Carol Dawber and Ross Calman.

Carol is a writer, editor, indexer and oral historian who works mainly with print books on New Zealand history and biography. She is the managing editor of River Press publishers. Ross is a writer and editor, specialising in Māori language editing. He is the author or co-author of nine books, including Māori mythology anthologies, Māori-English dictionaries and introductory works on the Treaty of Waitangi and the New Zealand Wars.

Māori names have long appeared with great frequency in New Zealand texts. Nowadays, Māori words and terms are increasingly also used in our English-language texts, and there are numerous publications in te reo Māori, the Māori language.

Handling them coherently and with respect is obviously a high priority for New Zealand indexers, record-keepers, writers and editors.

It is also important for people in such fields overseas. New Zealand publications are indexed by Australians as well as New Zealanders. Māori names, at least, appear in texts in Australia, where there is now a significant Māori diaspora.

Māori and other Polynesian names also appear in many texts and records farther afield, so they have to be handled in Britain, the United States and to a lesser extent in other countries.

For two centuries, doing so was inconsistent. Many early transcribers of Māori names were conscientious and capable, and Māori themselves quickly became literate, but neither were living at a time of massive information retrieval, or even common indexing.

So, there were variations in the spelling and form of names. These can be particularly difficult in retrospective indexing, when one is indexing a book published in the 19th century, whether to create a stand-alone index as we do in the ANZSI New Zealand branch series or to index a new edition of a classic.

For example, names beginning with the definite article Te, meaning The, were sometimes written without it. That was gradually corrected in texts, but confusion continued in indexing through the 20th century. Some indexers applied English-language conventions and ignored the Te in sorting or inverted it. Nowadays, almost all treat it as an integral part of the name and enter it direct. The same applies to the plural definite article, Ngā.

There are many other variations, and I do not recommend using a book published before, say, 2005 as a definitive example of what to do.

The National Library has set good standards in its cataloguing for several decades, but until recently there was no comprehensive guide for book indexers. The 1997 New Zealand editing style book *Write Edit Print* had a short section, though, wrongly in my view, on the names of organisations it recommended alphabetical arrangement by the first word following the leading article. I know of only one general indexing manual mentioning Māori names, Pat Booth's in 2001, which had a paragraph on the handling of Te. I don't think other Polynesian languages fared much better.

Last year, however, the ASI book *Indexing Names* had a comprehensive section on Māori names by Elaine Hall, and the ANZSI-edited issue of *The Indexer* included an article by me.

What we seem to be moving towards, then, is standardisation for the practical purposes of information retrieval – against a background of respect for the forms of Māori language and names.

One evolution here is that we no longer add the letter "s" to make Māori words plural, which is important to keep in mind when creating subject headings. If you are given a text with "s" plurals, discuss this with the publisher.

I am purely a book indexer and basic computer user, and can only guess at where all this fits into modern digitisation. Perhaps it pushes us towards more standardisation of spelling and form.

In all this, we must consider the needs and habits of the users – the book reader and the database user. Some English-language indexing conventions are arcane and not widely understood by readers. So, let's not get carried away with a desire to impose international "rules".

What I will do here is mention some of the grey areas and remaining inconsistencies.

These are some examples from my own indexing of English-language books where authors liberally use Māori terms:

The 1840 Treaty of Waitangi, signed by a representative of the British Crown and many Māori chiefs, is referred to in innumerable texts. In Māori, it is Te Tiriti o Waitangi. However, the two terms often refer to distinct documents – the English-language and Māori-language versions – and even in an English-language publication the author may use the two terms to distinguish between them. The indexer must follow suit and provide two distinct main headings.

Anyway, what to do about "Te Tiriti..."? I index it as "Tiriti o Waitangi". A Māori librarian told me firmly that it should be treated the same way as "the Treaty of Waitangi", therefore beginning as Tiriti. Anyway, with or without the "Te" it is in much the same place in an index and easy for a reader to find.

Other terms are more problematical. Another important document in New Zealand history, signed in 1835, is known in English as the Declaration of Independence. In Māori it begins with the indefinite article "He". In two books I did in 2011, I inverted the article and entered it under W as "Wakaputanga o Te Rangatiratanga o Nu Tirenī, He". That's consistent with "Tiriti o Waitangi" and with English-language practice. It presumably matches the National Library's treatment of "He" in cataloguing documents. However, will readers find it there, under W? I'm now leaning towards indexing it under H in English-language publications.

There are solutions, of course. One could enter it under both H and W as a double entry or one as a cross-reference.

Among less formal terms, we see "te ao", "te reo", etc, meaning "the [Māori] world" and "the [Māori] language", and we have to decide whether to index them under T as phrases with the initial "te" or as "ao Māori", "reo Māori", etc. Māori dictionaries list these as single words (ao & reo). However, two glossaries in English-language books from a Māori publisher retain the "te" and alphabetise them among the T words and terms. Perhaps that is practical for non-Māori readers.

Moving to another Polynesian language, Tahitian, in Anne Salmond's 2009 book *Aphrodite's Island* the text has initial capitals for such terms and the index uses Te Ao, Te Po, etc, under T.

A different example of the question of whether to keep or omit an initial article might be "ngā mōrehu" – the survivors. The initial letters are lower-case. However, in histories of Parihaka in Taranaki, including English-language texts, this is a significant phrase, not just a plural article and a noun. One could argue for an entry under N.

One area where library and book indexing practices differ is in the Māori titles of publications. Librarians omit or transpose initial articles in both English and Māori titles. Book indexers generally do the same with English titles (omitting or transposing an initial "The"), but in New Zealand the practice in indexing Māori titles seems to be to retain the initial *Te* or *Ngā* in, for example, *Te Hokioi*. At least that's what I've observed in books from Māori as well as Pākehā publishers. It may be at odds with both library and indexing "rules", but it may be justified in terms of where a reader would look.

Now, I look forward to what Ross and Carol have to say.

Robin Briggs, 13 March 2013

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EPUB3 INDEXES and the future of indexing

Glenda Browne; diagrams by Michele Combs

Abstract

This paper discusses the reasons why indexes are important in digital books, and then looks at what has been done with ebook indexes to date, and what options we have for making linked, active indexes, including new EPUB proposals. It then examines ebook indexing from the publisher's perspective, including the use of indexes as a marketing tool.

Why index when you can search?

Indexes provide access to information in a way that complements the use of search engines and browsing.

Indexes are **explorable** documents, providing easy paths to relevant content. Index users can:

- Use hierarchical relationships to zoom in and out (looking at broader and narrower terms)
- Use subentries to explore aspects of a topic
- Use related term relationships to get ideas of other places to look
- Use locators (page number equivalents) to get an idea of the relative importance and abundance of discussions by noting section length, special formatting (eg, bold for key discussions) and the number of locators.

Peter Meyers describes indexes this way: 'a kind of a collection of pre-made searches: rather than diving headlong and unawares into a search oval's do-it-yourself void, an index presents would-be searchers with an already assembled, alphabetized list of the 500 or so most common query items.'ⁱ

Indexer users might find more than they are looking for. James A. Michenerⁱⁱ has written: 'I see in the indexes reminders of topics of which I am interested, but, of equal value, I see notations about ramifications that had not occurred to me.'

Indexes also **concentrate** information, providing concise entries that describe the essence of the content the user will be able to read, rather than providing extracts of text from around the search result. The extracts provided by search engines are usually much longer than index entries, and there is no guarantee that they provide the most useful contextual information.

Indexes often provide a level of specificity intermediate between the table of contents and search results. Geoffrey Marnellⁱⁱⁱ has written: '...an index is a better guide than a table of contents to the sweep and depth of knowledge available in the text, revealing far more opportunities for discovery and learning.'

Indexes also **aggregate** information – ie, they group links to discussions that are on similar topics, even if the wording used in the text is not the same. They group the Matterhorn with Monte Cervino and group Bonnie Prince Charlie with the Young Pretender and Charles Edward Stuart.^{iv}

These are easily identified groups, but even so, Kindle X-Ray (only in Kindle Fire) doesn't always manage this, failing to group Buffalo Bill with William Cody, while grouping, incorrectly, Daniel Burnham senior and junior. This is despite the fact that this information is in Shelfari, which they say they use as a resource.^v

Indexes also provide more subtle groupings, eg, of farm waste pollution in Chapter 2 grouped with agricultural runoff to watercourses in Chapter 12^{vi}.

Indexes also **disambiguate** – ie, when two or more concepts are worded the same but refer to something different, the indexer will add a qualifier in parentheses or do something else to make it clear that the concepts are different. If two different entities called ASTC are discussed in the document, the indexer will present them with full forms of the name in parentheses:

ASTC (Australian Society for Technical Communication)

ASTC (Alice Springs Town Council)

ASTC-design

In a more complex example, for a book on Aboriginal convicts^{vii}, the indexer (Jonathan Jermey) has done the work of distinguishing between different people called Jackey, so the user can be clear when entries are referring to the same people or to different people.

'Jack' ('King Burrikan') 39
 'Jack' (native servant) 115
 'Jackey' (c.1780-1840) 7
 'Jackey' (c.1800-1834)
 arrested and charged 44–6
 as 'domesticated Aborigine' 41–2
 transportation of 36–7, 56
 trial of 48–51
 wounded by leg irons 251
 'Jackey' (c.1825-1840) 7
 'Jackey' (sentenced 1865) 148
 'Jackey' ('Tallboy') 129, 133–6
 'Jackey Jackey' 85–7, 89, 93–4, 98–9, 141
 'Jackson' 14, 255
 Jackson, Constable 199
 Jackson, William 136–7
 'Jacky Jacky' (Koenghegulluc) 104–7, 123
 'Jacob' 164
 'Jaggy Jaggy,' *see* Lo.gir.ma.koon

Indexes are **selective**. They include entries that have been considered significant by the indexer, and avoid passing mentions and minor discussions.

- A cookbook index entry for *eggs* may show you the *custards*, *soufflés* and *meringues*, but not every recipe that has an egg in it.
- An index won't lead you to 'as we saw in the chapter on Leonardo' when you look up 'Leonardo', but a search engine will.^{viii}

Indexes also provide **categories** that may not be named in the book. A cookbook may have entries for:

chilled desserts
 gluten-free cakes
 Sicilian main meals

In *The Indexing Companion*^{ix}, the entry 'controversies about indexing' groups discussions on issues that indexers often disagree about. The index also differentiates this concept from the indexing of controversies.

- controversies about indexing
 - filing order
 - function words in subentries
 - indexing 'indexing'
 - passing mentions
- controversies, indexing of

Indexes **contribute to the tone of a book**, and show attention to detail and commitment to quality. Academics expect indexes in quality books. As Agata Mrva-Montoya^x points out:

'An index and a bibliography have been integral components of scholarly monographs...This is where they tend to start reading a new book – from the back...'

Indexes can be **fun**. When Sarah Palin published her memoir without an index, Darby created one for her^{xi}:

- Iraq war
 - Palin's informed perspective on 214
 - Media's skewing of Palin's informed perspective on 238

- Lies told about Sarah Palin 74-75, 77, 79, 95, 102, 148, 202-204, 215, 232, 236-239, 246-247, 272-275, 289, 314, 318-320, 338, 343, 346-348, 350-352, 365-366, 378, 380
- Lies told by Sarah Palin N/A

Research done by the BNA into the usability of indexes in legal books found that index users had an 86% success rate while text searchers had only a 23% success rate. The study included both single answer and more complex research tasks. They also found that use of indexes saved time.

Search cannot fully replace indexing in ebooks because the algorithms that work for web-wide search don't usually work for smaller collections, including intranets and ebooks. Ebooks don't have the content nor the number of users to provide adequate feedback for relevance ranking.^{xii}

Ebook indexes to date

Indexes are a useful information access tool for ebooks, but have, in general, not been well-implemented to date. Indexes have been omitted or provided inadequately – with no page numbers, with unlinked page numbers, or with linked badly-displayed page numbers. Eg, display of indents can be a problem in indexes on the Kindle.

An informal study of Kindle ebooks found that of 21 titles that had indexes in print form, only two had fully functional, linked indexes in the ebook. Also, when Amazon says that a book has an index, there is almost no way of finding out in advance whether it is an active, linked index or just a copy of the print-format index.^{xiii}

Mike Cane^{xiv} reported on unlinked indexes that had notes suggesting 'entries in this index, and other terms, may be easily located by using the search feature of your e-book reader.' Not very useful!

Unfortunately the existence of inadequate indexes can lead people to think that ebook indexes are not worth the effort.

Options for creating active indexes

For publishers and indexers who decide to provide active indexes three important decisions are:

- What software to use
- What to use as text targets (the 'chunk' of content the user is taken to)
- What to use as locator link text (the text that is displayed and/or selected by the user).

Active indexes – software choices

The software indexers use will largely depend on the approaches publishers are taking to creating ebooks. Indexing may be embedded using XML editors^{xv}, page layout software or Online Help software (mainly used by technical communicators), or standalone indexes may be created and linked to XHTML anchors or other tags in the text. Embedding can be more difficult than standalone indexing, but it provides flexible options for the use and reuse of index entries. Software solutions for ebook indexing have been discussed by Jan Wright.^{xvi}

Embedded indexes using XML editors

When creating embedded indexes, the whole index entry is inserted into the text. Embedded index entries in XML files contain a wrapper for the whole entry set, and a separate wrapper for each part. In the example below, the <index> tags wrap the whole entry, the main entry is enclosed in <primary> tags and the subentry is enclosed in <secondary> tags.

```
<index><primary>videos</primary><secondary>slow moving images in</secondary></index>
```

Indexers will have to use an XML editor or a simple text editor for adding index entries and for validation. Validation finds any errors in the XML (eg, missing tags, or tags in the wrong places). There are many free editors, eg, Notepad++ and Jedit. There are also standalone validators on the web. Oxygen is the main XML editor available for purchase.

DocBook is an XML markup language commonly used for ebook production. It is used with style sheets to compile print and electronic indexes from XML. It uses section headings as locator link text and page numbers as locators.

Embedded indexes using book layout software

Embedded indexes can also be created using word processing programs such as MS-Word, LibreOffice and OpenOffice, and page layout programs such as InDesign and FrameMaker. The entry below shows how an embedded index entry for the concept coded in the section above would be inserted in MS-Word.

```
{ XE "videos:moving images in" }
```

Although index entries can be embedded into word processing and page layout programs, at this time, no commonly-available book layout software natively outputs EPUB or HTML indexes.

- There are expensive customised solutions like Typefi.
- Indesign and FrameMaker can output active PDF indexes, and, using a workaround, InDesign can create EPUB indexes
- MS-Word's markers don't completely translate to InDesign when imported.

Unless XML is used, indexers and publishers encounter problems with incompatible markup systems.

Embedded indexes using Online Help software

Online Help software is used mainly in technical writing. MS-Word or FrameMaker, eg, are used with Doc-To-Help, RoboHelp, Author-It, and Madcap Flare to output ebooks.

Hyperlinked and tagged indexes

Standalone (non-embedded) indexes can be created in dedicated indexing software (or using any other method). For a hyperlinked index they are then linked to standard anchors in the text.

An example of the hyperlink for paragraph number 2.1 and its target in the text are shown below.

```
<a href="../../Text/FreelanceIndexing.xml#s2.1">2.1</a>
```

```
id="s2.1"
```

For tagged indexes the standalone index refers to coined 'tags' in the text rather than anchors. These are sometimes based on chapter and sequence numbers.

Tagged indexes rely on an outside compiler to generate views of the index and create links to unique IDs. Transformations have to be run to have the index work in each output format, and the publisher might have to tweak the ebook to get the exact output they require.

Single-sourcing – reuse of indexing

Indexing can be reused in ebooks. Mashups can be created by combining content from two or more sources (if copyright and moral rights allow). This is useful for indexes for book series or runs of journal articles.

In the other direction, subsets of indexes can be used for books made from parts of bigger books. This is relatively easy using embedded indexing or hyperlinking, but results vary. There may be problems with orphaned subentries, missing cross-reference targets, and relative vs. absolute links. For an index within a document, the link only has to show the relative position of the target in that document, but for multi-document indexes, an absolute link is needed to take the user to the required document, and then to the location within that document.

The indexing approach taken may be different if reuse is planned. Indexing of the metatopic (the main topic of the book) will be explicit, and more subentries may be used.

Active indexes – text targets

After choosing the software that will be used for creation of the book and the index, the indexer and publisher have to decide what to use as text targets. That is, what chunks of text will the index lead

users to. Indexing targets can be grouped at each page break, section or paragraph, or they can be inserted at discrete locations (specific words) spread throughout the text.^{xvii}

Text targets – page break references

For books that are 'born digital' and use reflowable text, page numbers have little meaning, although they are often used if there is a print equivalent. Page numbers may retain value for legacy books for citation and comparison with printed versions, and for books in PDF format. If they are just to be used for navigation they can be included as anchors in the text without being displayed on the screen.

There will be a transition period, after which it is likely that paragraph or section numbers will take over when numbers are needed.

Indexing decisions about page numbers will largely depend on book-level decisions

There is an electronic version of Charlotte Brontë's *Shirley* which contains page break references from two separate print versions, so it is possible to navigate through the text relating to either of two separate print editions.

Text targets – paragraphs or sections

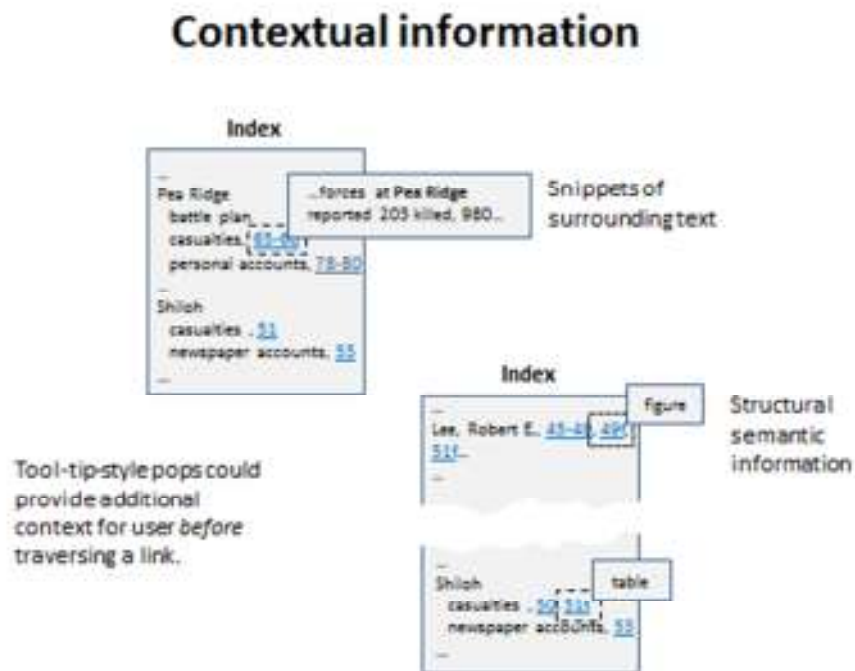
Paragraphs and/or sections provide a logical grouping within the text. Sections can be a problem if they are too long; if they are, intermediate anchors can be added. If a publisher thinks about the indexing of an ebook from the beginning of a project, they can ensure that sections will be an appropriate length to be targets for index entries.

Text targets – exact locations

Indexing to word or sentence level can take the user directly to the content of interest. This will be most useful for specific names, definitions, and topics that are only discussed briefly.^{xviii}

Placement of anchors is also important for the presentation of contextual information. When a user hovers over a term in the index, a reading system may be able to display some text from either side of the target of that entry in the text. This will be most useful if the tag has been placed within the most useful text.

Figure 1. Contextual information



Text targets – audio, video and images

Time offsets into audio and video files and x,y coordinates into videos and pictures can be targets for indexing if Canonical Fragment Identifiers (CFIs) are used. CFIs are discussed later in this article.

Active indexes – locator link text

As well as choosing what to use as text targets, the indexer and publisher have to decide what to use for the locator links – ie, the bits of the index that users view and/or click on). These can be many things, including:

- Page numbers
- Paragraph and/or section numbers
- Running numbers (eg, 1, 2, 3)
- Symbols (eg, *, *, *)
- Main entry or subentry text
- Applicable section headings from the book (eg, DocBook and the online help authoring program AuthorIT do this)

These alternatives are similar to those that have been considered for website indexes over the last decade.^{xix}

The choice of locator link text might influence other indexing choices. For example, if entry text is used as the clickable link, indexers might wish to create subentries for all entries to make it clear that they are locators, rather than being an unlinked main entry used to gather subentries.

Introduction to Indexing experiment

I created a mini-EPUB ebook based on five articles from my website^{xx}. I indexed to paragraph and section level, and created two versions of the index. In one the numbers are visible; in the other the main entries or subentries are the clickable links. I have underlined the links here, but in the electronic file they were not underlined.

The ‘cleaner’ one (the top one), in which the entries are links, was considered more attractive

indexing standards
indexing standards 3, 6.1

The second one, with paragraph numbers displayed, was found to be more useful.

- The numbers provide information about the probable length of the content being targeted
- The numbers help the user home in on the required text when they get to the location in the text
- Including the numbers means that you can have more than one locator per main entry or subentry
- Including the numbers means that if you want to use both main entries and subentries as locators, it is clear to users when a main entry has a link

Publisher choices for creating active indexes

Publishers’ priorities will largely determine the software used and the output chosen for the index.

The underlying and visible structure of the book will influence choice of text target, as will the nature of the content. For example, if the book has numbered sections these are likely candidates as locator targets. On the other hand, if the content is fragmented, then specific points in the text might be the best locator targets.

The complexity of the index and expected users will be among the things that influence choice of locator link text. It may be that younger people prefer to be taken to specific points and that older people would rather take the time to read the context of a discussion. (Or it might be the other way round – we don't have much information about user behaviour with ebook indexes).

The optimal choice of locator text might be different for different reading systems, with brevity a priority for smaller devices.

If the content of an ebook may be reused this may affect the preferred method. Things that can be assumed when there is one index for one book might not apply when indexing is reused. This means that the metatopic (main topic) should be made explicit in index entries, and attention will have to be paid to the relationship between the metatopics of all the books being merged.

Information from SI and *The Indexer*

The UK Society of Indexers Publishing Technology Group has set up a website with definitions of terms about ebook indexing.

They have also published a special issue of *The Indexer* about ebooks^{xxi} and a themed collection of articles for beginners called *Newcomers*^{xxii}; it has an active index. *The Indexer* welcomes suggestions for publications about ebook indexing (and other topics) for review. The Australian contact for reviews is Madeleine Davis.

EPUB indexing developments

EPUB Indexes Working Group (IWG) has been working on a draft specification for indexes^{xxiii}. After review by the IDPF Board it is expected that comments will be received from IDPF members and other interested parties. This will include (among others) indexers, publishers^{xxiv} and software developers.

The original Indexes Working Group Charter Document listed four use cases^{xxv} (things that the indexes specification should enable). As the group worked through these use cases, it was found that the coding that was necessary to enable the first use case was all that would be needed to enable the other three. They were therefore written up as implementation suggestions – ie, ideas for reading system developers to incorporate.

The EPUB specification will define coding that will enable the creation of effective, linked indexes, but it will be up to publishers to include this coding, and up to reading system manufacturers to make use of it.

EPUB IWG use cases/implementation suggestions

The four use cases/implementation suggestions are:

- Chapter-like index – the electronic equivalent of a standard book index.
- Index term search (pop-up index)
- Index locator search (reverse index)
- Standalone indexes – ebooks that contain nothing but indexes to other ebooks (eg, journal collections; books in series). Provision of standalone indexes to other EPUB ebooks depends on having a standard for cross-EPUB linkages. This is not yet available, so standalone indexes have not been discussed further here.

Chapter-like indexes

The chapter-like index is the electronic equivalent of a standard book index. It will encode index features such as main entries, subentries, cross-references and locators to enable their effective presentation and manipulation by reading systems.

EPUB publications include a Package Document, which specifies all the constituent content documents and their required resources, defines a reading order, and associates metadata and navigation information.^{xxvi} The Package Document of an EPUB identifies when one or more indexes

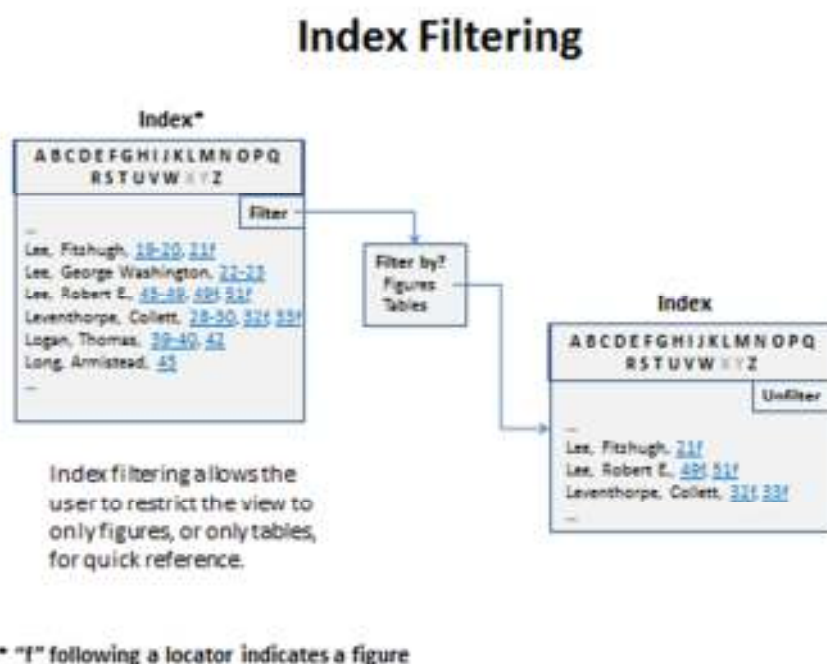
are present. This information could allow the reading system to offer the user choices about which index(es) to include as the user interacts with the EPUB. For example, the reading system could allow the user to browse the index directly as a content document or to include/exclude index(es) from the basic search.

Proposed EPUB coding will enable the filtering of indexes to target entries of specific interest to a user if publishers have tagged them to show their nature. If locators are tagged to show the nature of the content they lead to, a user could ask the reading system to show only locators that point to tables, or figures, for example.

Tagging names and subjects will enable the provision of one combined index that can be separated by the user at will. This solves the print indexing dilemma of choosing between providing combined or separate indexes.

The basic solution at this time to enable this is to rely on XHTML5 alternate style sheets, but more sophisticated methods may be developed in the future.

Figure 2. Index filtering

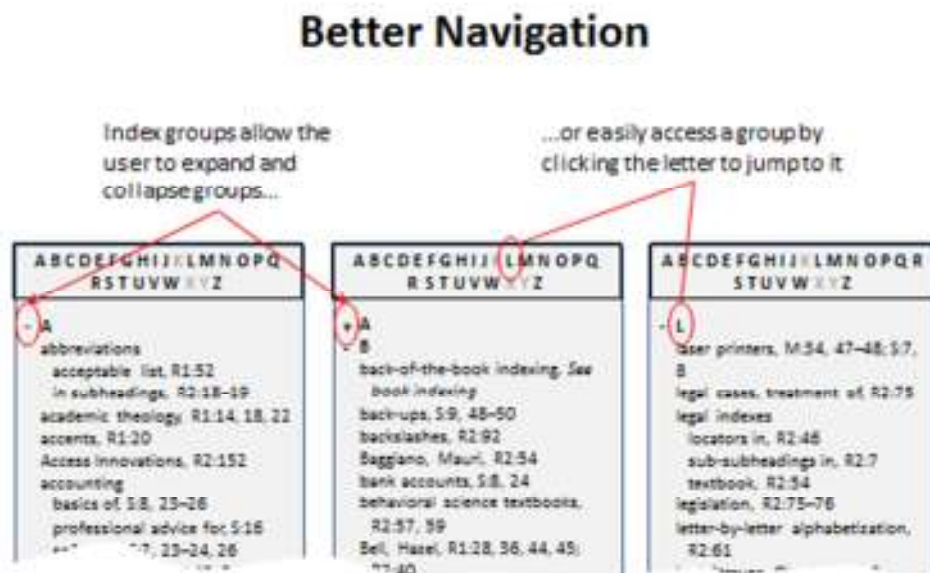


When a user hovers over an index term, depending on the coding the publisher has provided, they might be able to see the type of content that that entry will lead them to (eg, that is a figure or footnote). This feature could use the same coding as used for filtering.

The link between a locator and its target in the text could be used to display a tool-tip-style pop-up containing 3 to 4 words on either side of the target, as a sort of preview. This would enable the user to get a sense of the context in which the term appears at that location, and choose whether or not to follow the link.

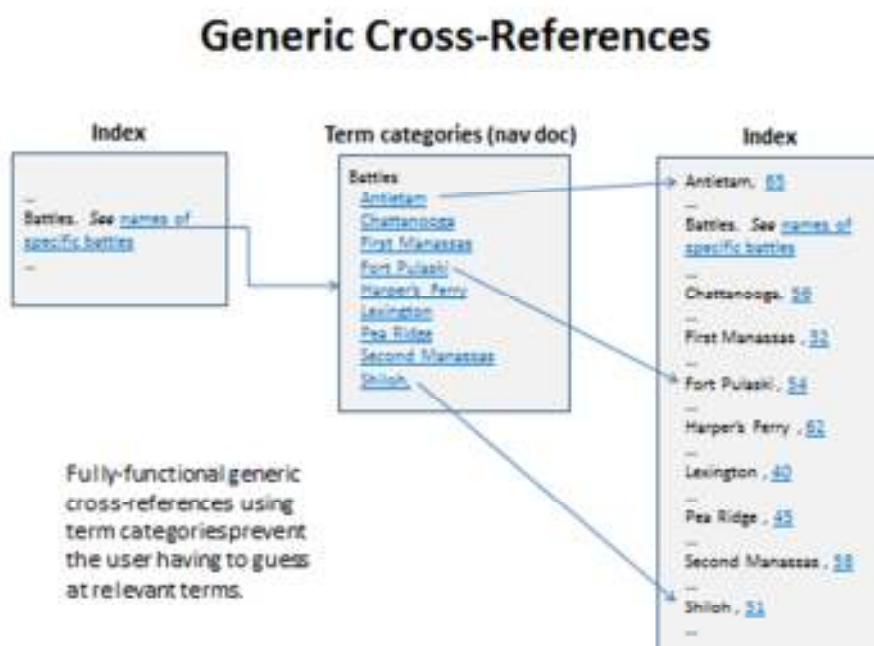
Coding of main entries and subentries could be used to allow users to expand or collapse main entries. Coding of groups of entries (group break navigation data, for example, entries beginning with A, B, C, etc.) could allow users to easily move between groups in the index. This is an important feature for accessibility

Figure 3. Group break navigation



Generic cross-references direct users to categories of terms rather than to individual terms, eg, '*see also names of specific battles*'. In a print index, the user has to guess which specific battles have been indexed. The specification proposes that if publishers encode the type of entries, generic cross-references will be able to provide the end user with a list of all the potential related terms in the index (in this case, all of the named battles).

Figure 4. Generic cross-references



Locator ranges and CFIs

Locator ranges may be provided in a number of ways.

- Legacy books may just have numbers, eg, '67-89' with no links
- Ranges may link to the first number, eg, '67-89', with a link to location 67
- Ranges may link to both the first and last number, using hyperlinks or CFIs. This option provides more information for the reading system to present to users.

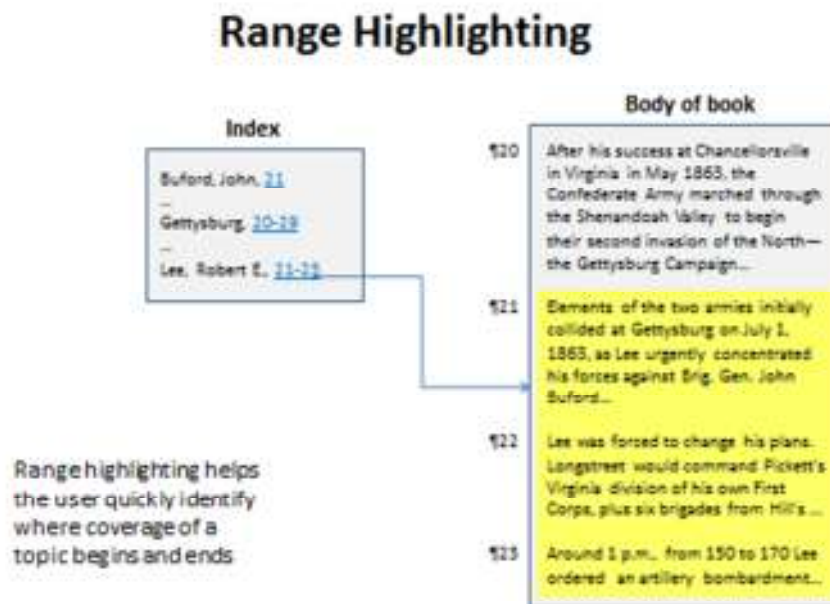
Reading systems may be able to show users the extent of the range, eg, by making the background of the relevant text a different colour.

This coding may also be useful for Index locator search (discussed later).

EPUB3 CFIs are automatically generated pointers to every part of the text. They describe every location in a book through its relationship to the start of the book. In non-technical terms, something like 'CFIstartshere, Chapter 1, Section 3, Paragraph 5, 87th character in'. A real example is '[epubcfi\(/6/4\[chap01ref\]/4\[body01\]/10\[para05\]/3:10\)](#)'.

CFIs are potential anchors for links from indexes and can be used to show ranges, but they are not easily human readable, and there is as yet no software to easily insert them into indexes.

Figure 5. Range highlighting



Index Locator Search (reverse index)

One of the use cases that is now an implementation suggestion is Index Locator Search (initially called reverse index). Using this idea, users who encounter a section of text of interest to them could select the range of text and trigger a display of all of the index entries that contain locators pointing to somewhere in the selected segment.

This would require the presence of anchors in the text (or the use of CFIs), so that when the user selects a paragraph, the reading system could then use those anchors in a backwards direction to find the associated index terms.

Index Term Search (pop-up search)

Another use case that is now an implementation suggestion is Index Term Search (initially called pop-up search). Using this idea, users would be able to go to a location in the index from within the text, either by highlighting words in the text or by typing a search term, without losing their place in the text.

Hits from the index could be presented alone or alongside search results from the text and other parts of the book such as the glossary. This would provide a one-stop-shop that allows the user to select the content most appropriate to them at the time.

Because users may be searching using terms from the text, indexes may be able to provide alternative search terms to maximise the chance of a successful search. These terms could be displayed or hidden.

Alternative search terms

Alternative terms could include variants used in the book as well as other terms users might think of. In particular, alternative terms could include spelling variants (eg, fetus/foetus) and names in direct order. Other alternatives such as acronyms and full versions of terms may already be included in the index as cross references. If not, they could also be added as alternative terms.

The coding of alternative search terms could look something like the example below (but it is pseudocode and not an official part of the specification):

```
<entry>
  <headword>Twain, Mark
    <search-form value="Mark Twain"/>
    <search-form value="Samuel Langhorne Clemens"/>
  </headword>
</entry>
```

If this feature is not implemented¹, users will have to rely on ebook search functions such as fuzzy search and Boolean searching, and indexers will have to make their terms more explicit, eg, using 'foetus (fetus)'.

Accessibility of ebooks

Indexes contribute to ebook accessibility, especially when they have:

- Semantic markup – saying what things are, rather than how they should look. Eg, an index will say 'subentry' rather than 'indent 5 spaces'.
- More structure, e.g. sectioning the index by letter of the alphabet
- Dynamic lookups (e.g. auto-completing search boxes) that don't involve manual navigation
- Text-to-speech synthesis

Publishers and ebook indexing

Publishers' decisions about how to create and structure ebooks have a major impact on the process of indexing. The publisher's choice of XML-first publishing or use of page design or other software will determine the software and approach the indexer takes. The way books are structured will influence the choice of text targets and locator links and the potential difficulties of the job. Books are easier to index when they are:

- Well-structured
- Have meaningful divisions
- Use visible or hidden paragraph numbers or other locators
- Have usefully-worded section headings

¹ When I gave this presentation I didn't realise that although alternative search terms had been discussed by the IWG, they were not in the current draft specification. I have amended this text accordingly.

The better the structure, the simpler the task, and the quicker and cheaper the indexing will be. Indexers can, however, work with most material that publishers provide.

Commissioning indexes

When commissioning indexes, or assisting authors to create indexes to their own books, publishers should provide information about the following:

- Audience of the book
- Software to be used; output format; reading systems being catered to
- Planned reuse of the text and indexing, if any.

Indexing style requirements include:

- locator types
- depth of indexing
- choice of terms (eg, length)
- use of subentries
- length of entry blocks (ie, a main entry with all of its associated subentries, locators and cross references)
- inclusion of group break navigation data

Special features requested may include:

- locator or term metadata
- alternative terms as metadata (if implemented)

Because ebook indexing is relatively new, and quite varied, it is not safe to assume that your expectations for a job are understood by the indexer if they are not made explicit.

File management is crucial when embedded indexing is being provided. Publishers and indexers must be organised about receiving and returning files, and both parties must make sure they don't change anything that is not meant to be changed.

Authors who have to index their own books will face new challenges.

- Technical writers have often indexed their own work
- Academic and trade authors may have to learn how to make linked indexes, or may have to delegate indexing tasks more
- Publishers will have to provide extra guidance to authors including clear procedures and style guides.

Publishers – indexes as a marketing tool

Indexes are an obvious candidate for inclusion in ebook samples. They provide a lot of information about the content of a book, without in any way giving away the content to the extent that someone wouldn't buy the book.

Joe Wikert wrote 'I'm bored with ebook samples... Let's start with the index... Give me a sense of what amount of coverage I can expect on every topic right there in the sample... Btw, if the entire book is included like this [with words crossed out] then the index can include links back to the pages they reference.'

Brian O'Leary^{xxvii} has spoken about books as being made up of containers, content and context. The container is the print or electronic format, the content is the text of the book itself, and context is 'defined here as tagged content, research, footnoted links, sources, and audio and video background, as well as title-level metadata.' He says that 'to support discovery and utility in digital environments, we need to compete on context' and 'When content scarcity was the norm, we could live with a minimum of context. In a limited market, our editors became skilled in making decisions about *what would be published*. Now, in an era of abundance, editors have inherited a new and fundamentally different role: figuring out how "what is published" will be *discovered*.'

Indexes are a great way of providing the context of a book.

Hugh McGuire has also written about discovery^{xxviii}. He says 'If self-publishers can do a lot of the things publishers used to do, then finding new and better ways to "make public" writing is what will separate the good publishers from the bad in the future.' and 'An index is a kind of "map of the stuff in your book, and where to find it."' By using semantic tagging to say that index entries are people, places, and specific types of things, the publisher can provide a semantic map of a book which can make the book 'live' online.

While samples aim to provide information to users, ebooks also allow publishers to find out about their readers. The *Christian Science Monitor*^{xxix} reported that '...many major e-readers and e-book platforms track book searches, monitor what readers download, and can share information without a customer agreeing first.'

This raises privacy concerns which are important, but are not addressed here. From the indexer's point of view, getting information about the way people use indexes could be really interesting. You could see which entries were selected and the order in which index entries were selected (perhaps showing the steps in a themed search), and you could see when users didn't stay long in the text after selecting an entry. Search logs could also show what terms users selected from the text, what terms they typed in, and what searches they did that resulted in no hits.

Publishers – metadata

Metadata (bibliographic data such as you'd find in library catalogues) is crucial for the findability of ebooks. EPUBs must include title, identifier (eg, ISBN) and language along with the modified property (the date the document was modified) using the Dublin Core standard.

ONIX for Books is an XML-based standard for book metadata (<http://www.editeur.org/83/Overview/>). ONIX3 bibliographic metadata can be included in EPUB3 files. ONIX is used with BIC subject codes (http://publishers.asn.au/index.cfm?doc_id=271), which

are from the UK. BISAC is the North American alternative. Thema (Panthema) is a new global standard to categorise and classify book content. It will be used initially alongside BIC, BISAC and other standards. The long-term goal is to move all markets to the global standard.

The Future

The IDPF EPUB Indexes Working Group shows that the industry is committed to quality indexing.

The inclusion of indexes in the EPUB standard will make it easier for publishers to provide linked indexes, and when more ebooks have effective indexes, the expectation that they can and should be included will be greater.

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From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

This paper may contain references to deceased people which may cause sadness or distress.

People and place: the future of database indexing for Indigenous collections in Australia

Exciting times ahead!

We at AIATSIS are broadening our horizons when it comes to sharing information with the world.

Mura®, the AIATSIS collections catalogue, has over 300,000 records relating to Australian Aboriginal and Torres Strait Islander histories and cultures. Deep within Mura®, is the ABI (Aboriginal and Torres Strait Islander Biographical Index), a research tool.

It is time to break out of the current way of doing things without losing the context and the value of what has gone before.

Background

In 1997 the Report of the National inquiry into the separation of Aboriginal and Torres Strait Islander children from their families (Bringing them home report) made a number of recommendations.

Recommendations 30a and 30b addressed the need to:

"Assist Aboriginal and Torres Strait Islander people separated from their families under past laws, practices and policies of Australian governments, to undertake family tracing and reunion initiatives."

And the ones directly relating to the ABI were:

"22a That all government record agencies be funded as a matter of urgency by the relevant government to preserve and index records relating to Indigenous individuals, families and/or communities and records relating to all children, Indigenous or otherwise, removed from their families for any reason.

22b That indexes and other finding aids be developed and managed in a way that protects the privacy of individuals and, in particular, prevents the compilation of dossiers."

The Family History Unit is charged with putting these recommendations into practice with Stolen Generations as the prime clientele. When we use the term Stolen Generations we mean children who were forcibly removed from their families as a result of laws, practices and policies of the day.

Previously the Family History Unit dealt with public enquiries as well as their main client, the LinkUp organisation. Our current funding body (DoHA, Department of Health and Ageing) determined that we would be working solely for LinkUp in 2010 and beyond. The Family History Unit relies on outside funding which may cease at any time. The work of the Unit is controlled by the contract obligations with the funding body. The ABI might not always be regarded as a mandatory part of the Family History Unit functions.

The Selection Policy for the ABI

It is quite unusual for organisations and/or individual indexers to have to work to a strong policy document. Having a policy underlines our governance capability and our adhesion to standards. The **ABI Selection Policy** drives the inclusion of works in the database with a Stolen Generations focus.

In summary, our indexing priorities are as follows:

- Personal, community and family histories
- Material representing 'geographical gaps' in the ABI
- Material relating to Aboriginal missions, reserves and institutions
- Material from the 1920s, 1930s and 1940s.

The policy is intended to be a guide to selecting material for inclusion in the ABI. The ABI Selection Policy is reviewed annually to ensure that it remains responsive to client needs. Currently the ABI Selection Policy is an internal document. However in the future we intend to publish it on the web.

Database indexing for family history

The ABI allows access to AIATSIS collections by all Australian Indigenous and non Indigenous peoples. Statistics show that the ABI "Search form" has the greatest number of hits of all AIATSIS web pages. The main focus for ABI entries is people and place, the foundation of family history research.

We maintain a detailed Procedures Manual that is constantly updated as our knowledge and experience with the works indexed increases. This document is referenced in the document for ABI indexing in the AIATSIS library which is available on the web at <http://www.aiatsis.gov.au/collections/CataloguingPolicies.html>. This document will be reviewed and updated in 2013 as part of the project to implement RDA (Resource Description and Access) at AIATSIS.

The standards used for creating ABI headings are AACRII and USMARC. These are the basis of cataloguing standards, internationally. We are currently moving to the new cataloguing standards called RDA (Resource Description and Access) and incorporating these into the ABI procedures.

As part of creating headings in ABI records, we use an authority file. Controlled headings for place names and language names come from our Thesaurus. Personal names are controlled by the authority file and currently are established following AACRII rules.

Pushing the standards and guidelines

The ABI records include an Annotation, that is, a summary of the information contained in the page being indexed. Annotations allow us to include information that is not permissible under the AACRII cataloguing rules. Variations of names, places and relationships can be part of the annotation where there is no other way of including this information in a standardised form.

Indexing *with annotations* is a value add for the catalogue and researchers. One of the goals of AIATSIS is “to maximise access to our collections particularly by Indigenous peoples”. This database is designed with the users in mind.

Passing mentions are used to great effect in the annotation. This is critical to family history where a work may be the only place a person might be mentioned in written records available to the public. As indexers are aware, it is not common indexing practice to include passing mentions unless it is of benefit to the audience.

Each ABI record also contains a Sensitivity message. This is the current message.

500	The ABI is a name index to published materials in the AIATSIS Library. Some records refer to deceased people or use words which reflect the attitude of the time or the author and may be offensive.
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Even if the record is taken out of the catalogue it retains its meaning and context. Especially when the records are added to other databases like Trove.

As a result of these measures, the ABI maintains its credibility as a primary resource for Indigenous Australians researching their family history. The excellence of the indexing practice is underpinned by our thesaurus and the expertise of the indexer.

This is an example of an ABI record showing the annotation, passing mentions, personal name heading and thesaurus terms.

	Tag	Ind.	Contents
▼	099		B F263.67/L1
▼	245		Aboriginal Biographical Index entry
▼	520		Carmen Drummond; born 1915, grew up in Darwin; mother Victoria Alberleda, mothers mother from Moa; father Donald Villaflor, Philippine and Spanish background; met Ali when in Thursday Island with friends Jack and Lulu Assan; Carmen and Ali married 1936; children: Carmen Junior, Ali Donishio (Bulgai) b 1944 Cairns; Yvonne Leah (Bonnie) b 1945 Mossman; Victoria Ann (Vicky) b 1947 Mossman; Christine Eve (Tina) b 1948 Thursday Island; Sylvia Veronica (Dilly) b 1951; Paul Mario b. 1953; lived on Thursday Island; Carmen died 1984
▼	500		Please be aware that some ABI records contain language, words or descriptions which may be considered offensive or distressing. These words reflect the attitude of the period in which the item was written and/or that of its author. Please also be aware that ABI records may contain references to deceased people which may cause sadness or distress.
▼	600		Drummond, Carmen, d1915-1984
▼	691		Waiben / Thursday Island (Qld TSI SC54-11)
▼	692	**	Torres Strait Islanders (Qld TSI SC54, SC55)
▼	773		Faulkner, Samantha. tLife b'long Ali Drummond : a life in the Torres Strait dCanberra, A.C.T. : Aboriginal Studies Press, 2007, gp 64-67, 77

Challenges for database indexing at AIATSIS

The Family History Unit is committed to providing family history information in a respectful and culturally appropriate way.

There are many issues of sensitivity involved in the creation of ABI records and making them available on the internet. We acknowledge that ABI records contain information about Indigenous individuals and that such information may be upsetting to some people. Indigenous individuals, families and communities are welcome to contact the Family History Unit if they have concerns about any ABI record(s).

Works indexed are now mainly personal biographies/autobiographies/life histories. So there is always the context of a person's life. Because of our current emphasis on the Stolen Generations, the scope of the index has narrowed. **And** it is very difficult to determine if a person is Indigenous or not. It is generally the context of the work, ie, personal history that determines the inclusion of a person in the ABI. The decision to include a person/persons is made even more difficult where pseudonyms are used in works!

Outreach

Following on from our paper at the Sydney ANSIZ conference in 2009, we decided to develop a tutorial on cataloguing and indexing Australian Indigenous names (*Talkin' names*).

The *Talkin' names* tutorial was well received and this gave us the impetus to continue with more tutorials that delved into the construction of our thesaurus terms. *Connecting to Country* looks at terms in our place thesaurus. The primary audience for all our tutorials is cataloguers and indexers working with materials with Indigenous content.

Both tutorials have been designed and prepared by qualified trainers with a Certificate IV in Training and Assessment. We are growing our suite of tutorials to contribute to the ongoing improvements in information and geographical literacy for our users. Other libraries and archives with Indigenous clients can incorporate our practices with theirs if they find them useful.

These tutorials are a practical demonstration of the ATSILIRN (Aboriginal and Torres Strait Islander Library and Information Resource Network) protocols in action.

The future : is it more of the same?

People and Organisations— sharing index records

It is the intention of AIATSIS to add ABI records to People and Organisations which is part of the Trove (NLA.gov.au) suite of information packages. Each record will have a sensitivity message to ensure that the integrity of the information is consistent with the AIATSIS environment. If Google and other harvesters access records from the Mura® catalogue and display them in a hit list they will retain their context even though they are no longer in the AIATSIS world.

While automatic indexing is cost effective, it is not a solution for us where personal names and place names are concerned. Ofcourse there are authority files like gazetteers and name indexes listing names and places behind the database. However, the indexer is required to make a judgement call. Is the keyword mentioned in the work a person or a place or a subject?

For example, the word cairns could be a place name such as Cairns, Queensland or a subject or a surname.

Automated indexing has not proved to be consistent or reliable in identifying a personal name or a place name within a string of words/characters. Place and personal names need to be kept in context. We cannot leave our indexing to an automated system.

Language

Tutorials are continually being created and updated as mentioned. In the future we would envisage language speakers being included in the audio. This is quite an innovative measure which we are

keen pursue. The next tutorial *In Language* is in beta testing and is designed for researchers seeking resources on language material. In the tutorial, the language heading structure is explained, just in the same way as the *Connecting to Country* tutorial examines the place name headings. A great strength of the language heading is the geographic reference to the 1: 250 000 map series.

Geospatial browsing of ABI

We are intent on describing material in appropriate spatial and cultural ways. Geospatial browsing is a leading initiative in quality research in Aboriginal and Torres Strait Islander studies.

A geographical reference code exists in every place name and language heading in the thesaurus. This number (SE55-01) is a 1:250 000 (or 1 : million) map series reference and standard for map location throughout the world. Here we have a tremendous advantage and foundation from which to build our geospatial capabilities in searching the catalogue.

We intend to have 1) a web page entry point to the data and 2) a standalone database.



Mansell families in Tasmania (conceptual view).

We are aware that other libraries and record agencies are using geospatial browsing and interactive maps for exploring their collections.

Potential for the ABI

There are new cataloguing guidelines being implemented in the library community. The new cataloguing standard (RDA) includes a number of optional fields. Potentially the personal name records will be richer in information than is currently possible. We will be reviewing our ABI

procedures against RDA standards and adjusting accordingly. By continually aligning ourselves with the latest international standards and developing our own, we are driving change to advantage our clients. The user or client or customer is always the centre or focus of attention.

We are in this for the long haul, not just the current circumstances or information environment.

Messages

We want to leave these thoughts with you.

Here we have the opportunity of delivering information to our clients using different and exciting ways of locating information. Underpinned by the standards and guidelines, ours and others, we can now overlay new and emerging technologies and make visible something that was deep within a database.

This is what we intend to do. How about you?

Links

Bringing them home report

http://www.hreoc.gov.au/social_justice/bth_report/index.html

AIATSIS website

<http://www.aiatsis.gov.au/index.html>

Mura® AIATSIS Collections Catalogue

<http://www.aiatsis.gov.au/collections/muraread.html>

AIATSIS Pathways thesauri

<http://www.aiatsis.gov.au/library/thesauri.html>

AIATSIS Library cataloguing and indexing policies

<http://www.aiatsis.gov.au/collections/CataloguingPolicies.html>

AIATSIS Library facebook page

<http://www.facebook.com/pages/Aiatsis-Library/485529081492483>

Seminar 8. Rebecca Stubbs and Judith Cannon

<http://www.aiatsis.gov.au/research/seminarseries/PastSeminarWebcasts.html>

Connecting to country

<http://www.aiatsis.gov.au/collections/connectingtocountry.html>

Talkin' names

<http://www.aiatsis.gov.au/collections/talkinnames.html>

Search the ABI

<http://www.aiatsis.gov.au/fhu/searchform.html>



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ABORIGINAL AND TORRES STRAIT
ISLANDER STUDIES

Connecting to country

Australian placenames



Photo by cedric



Photo by bruno

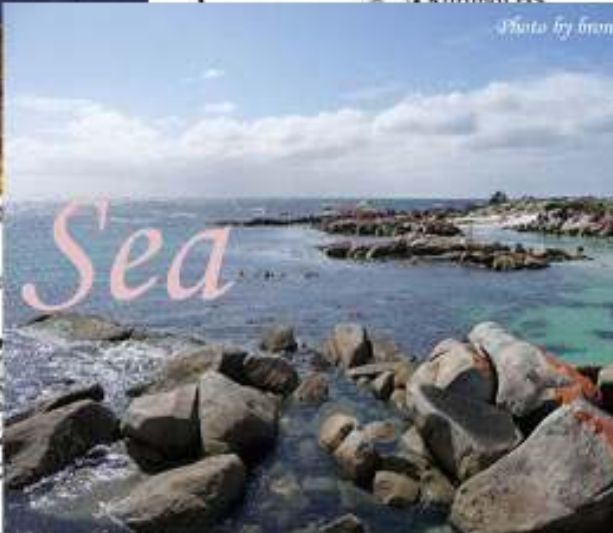
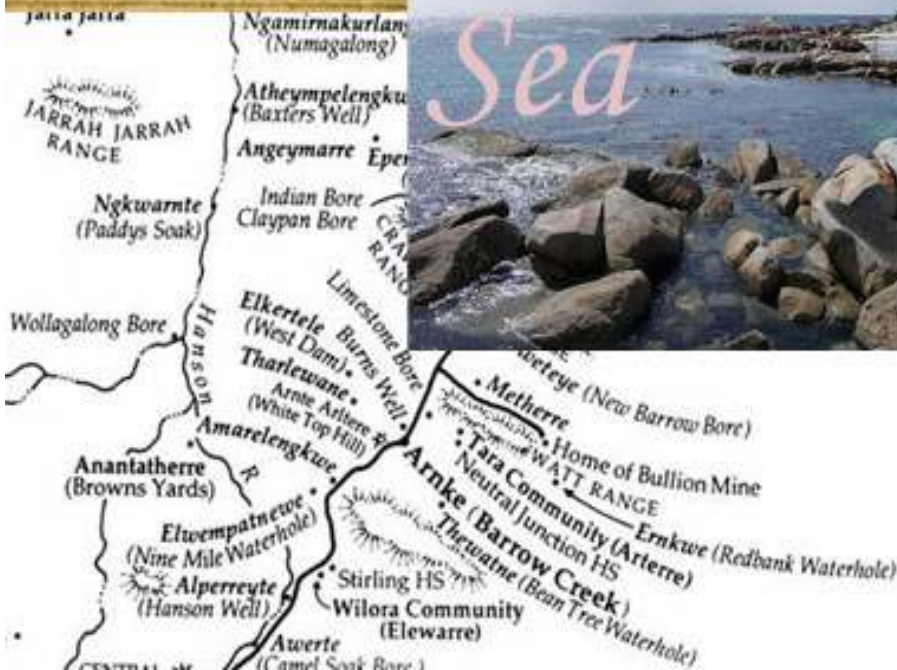


Photo © Ingo Oland



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Kilometres

AIATSIS Library
2012

<http://www.aiatsis.gov.au/collections/connectingtocountry.html>

Connecting to Country : Australian place names

About the tutorial: This tutorial gives an introduction to best practice for establishing headings for Australian place names.

Audience: The tutorial is aimed at cataloguers and indexers working with material with Indigenous content.

Running the tutorial: Flash player plug-in required - [downloadable free of charge](#)

- [Module 1: Introduction - duration: 2:34 mins](#)
- [Module 2: Pathways thesaurus - duration: 3:28 mins](#)
- [Module 3: Map related terms and standards - duration: 3:02 mins](#)
- [Module 4: Creating place name headings at AIATSIS - duration: 2:32 mins](#)
- [Module 5: Natural features - duration: 1:41 mins](#)
- [Module 6: Incidentals and exceptions - duration: 4:10 mins](#)
- [Module 7: Dual naming - duration: 2:32 mins](#)
- [Module 8: Review - duration: 2:08 mins](#)
- [PDF Guide to Connecting to Country](#)  (1.07 MB)

<http://www.aiatsis.gov.au/collections/connectingtocountry.html>



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ISLANDER STUDIES

Talkin' names

KING

BUNGAREE

Uncle Charlie

Akemara

Kngwarrey

Perrurle

Napangarti

Apu

Kumanjaya

Japaljarri

AIATSIS Library 2013


<http://www.aiatsis.gov.au/collections/talkinnames.html>

Talkin names : an introduction to Aboriginal and Torres Strait Islander personal names

About the tutorial: This tutorial gives an introduction to best practice for establishing headings for Aboriginal and Torres Strait Islander personal names.


The tutorial includes self paced modules and practice sessions for hands on experience.

Running the tutorial: Flash player plug-in required - [downloadable free of charge](#)

- [Module 1: Introduction duration: 4 mins](#)
- [Module 2: Aboriginal skin names duration: 9 mins](#)
- [Module 3: Other types of Aboriginal names duration: 11 mins](#)
- [Module 4: Torres Strait Islander names duration: 4 mins](#)
- [Module 5: Review duration: 1-2 mins](#)
- [PDF Guide to Talkin Names](#)  (73KB)

<http://www.aiatsis.gov.au/collections/talkinnames.html>

A new tutorial



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ISLANDER STUDIES

In Language

Photo by: ashroc

This beach area is known as
Nengi Bamir
pronounced Ne-ngi-mir
Ngunnawal word meaning 'see far (view)'

Photo by: Cas Smit

Photo by: Dylan Fogarty-MacDonald

BOOJEROOMA	MYSTERY
BOOTUL	HILL-TOP
BURRIGAN	BOOMERANG
EEJUNG	GRASSY
GOOMDOLAHRA	BIG WATERFALL
GOORODLBA	DEEP PLACE
OWONGORILLA	DANCING WATERS
KOOMGOYANA	SWEETHEART
KURA-BOO	DEEP DOWN
MUDJIN	NATIVE CAT
MUNDOP	WATER RAT

Photo by: Cas Smit

Photo by: Richard Barz

Gija People (East Kimberley)
Hector Jandany.

In the painting, the Holy Spirit is depicted in the form of the white owl of the Gija people from Warmun to Texas Downs in the East Kimberley, of which Hector Jandany who was a Christian, was the tribal Custodian. In the words of Hector himself, the dreamtime owl, like the Holy Spirit in Our Land:

"watches over us here in our country...in our hearts and everything.
He cares for us all here in the whole of our land."
(English translation by Frances Kofod from the Gija:
"Deg yinamenji-yarre yungunk ngenengga yarriyangen daan Murru-murru yinamenyji-yarre gamerren yarriyangen")

Coming soon!

Summary of ‘Military history indexing’, ANZSI March 2013

Peter Cooke

Military histories are typically long, and contain a high level of technical detail and jargon.

They may be written out of a personal enthusiasm, for a particular audience, to fill a gap in the historical record, and/or to promote a political or ideological view.

Indexes to military histories must:

1. Maintain consistency of style
2. Bear the audience in mind
3. Contain as many cross references as space allows.

The discussion was lively and covered the following points:

- Numbers e.g. 2nd Battalion, 40 mm gun
Should they be sorted as numbers, which can mean a large number of entries at the beginning of the index?
Should they be sorted as words, which can separate like from like?
- Subheadings e.g. Battalion, 2nd; Battalion, 3rd
It is important to be both careful and consistent here. Using a subheading like the above may mean that other, less obvious, subheadings become logically necessary.
- Ships, how to handle changes in their labels/types
This depends on the content level of the book.
Be consistent.
Compare –Alligator; Alligator (HMS, SS); Alligator, HMS and Alligator, SS; HMS Alligator and SS Alligator
- Rank, the rule is to use the highest, but is this always best and/or most accurate to the content and/or definable?
Rank can be omitted unless there is more than one person with the same name or including the rank adds to the sense of the entry or index.
- Names, adding nicknames or variants
Put these in () after the name.
Sometimes they can be sensitive.
- Abbreviations of military units/terminology
If possible put the full terminology in the index.
In military histories it is expected that there would be a glossary explaining the abbreviations.
- Sensitivity warnings
Should these be in the book, and/or in the index?
- Dividing up the index, e.g. having one for names, one for places, ...
Generally this is not a good thing to do.

Artillery vs other descriptions of weapons

Artillery needs a crew.



Ethics in Indexing

A Panel Session at the ANZSI 2013 Conference
Wellington, New Zealand

Moderated by Heather Ebbs, Canada



Scenario 1: You see another indexer's quality issues

An editor calls to say that his regular indexer is unavailable to do the sixth book in a series. He arranges for your services, and sends you copies of the earlier indexes. As you peruse them, you recognize a number of poor entries that don't meet current standards.



Scenario 2: A lack of skill or subject expertise

A client approaches you about doing some work that requires a skill (e.g., embedded indexing) or subject-knowledge base (e.g., virology) that you don't have.

Is your decision affected by whether this is a long-standing client or a potential new one?



Scenario 3: Censorship

An editor ships you the pages of a scholarly text that includes information on the creation myths of different cultures, including various aboriginal peoples, Christians, Muslims and many others. He asks you to be sure you index every single mention of every Australian aboriginal group, no matter how trivial the reference, but just to touch broadly on aboriginal people from other countries, and not to include any references to evolution, even though the author does describe it in relation to different world views in a few areas of the book.



Censorship (cont'd)

- Censorship in indexing ranges from selective or deliberate exclusion of entries in the index to having no index at all.
- Some of the reasons for censoring an index include economic grounds, marketing strategy, cultural beliefs, author requests and errors.



Censorship by typesetter

- Poor layout of an index can result in an almost useless index.
- The following is an extract from the index to *Crescendo: Melbourne Symphony Orchestra – Celebrating 100 Years* by Stella M. Barber.



Censorship: What was printed

The Really Useful Group 146
recitals 72
record/CD production 103, 124, 127, 171
Brett Dean's music 148
Classic Choice 128
Leroy Anderson's orchestral works 158
Mahler's Fifth Symphony 158
MSO launches its own record label, MSO Live 175
of popular classics 113
Rafael Méndez trumpet works 158
Simple Gifts 128 135, 138
United by the Moment (Commonwealth Games official
anthem) 177
of works by Australian composers 101
Recurrences (Conyngham) 124
Red Triangle Appeal concert, December 1918 16



Censorship: How it should have been printed

The Really Useful Group 146

recitals 72

record/CD production 103, 124, 127, 171

Brett Dean's music 148

Classic Choice 128

Leroy Anderson's orchestral works 158

Mahler's Fifth Symphony 158

MSO launches its own record label, MSO Live 175

of popular classics 113

Rafael Méndez trumpet works 158

Simple Gifts 128 135, 138

United by the Moment (Commonwealth Games official anthem) 177

of works by Australian composers 101

Recurrences (Conyngham) 124

Red Triangle Appeal concert, December 1918 16



Censorship: Lack of indexing knowledge

“The stupidest index I’ve seen was in the manual for a Kia car. Changing the wheel? Don’t look under C for ‘changing’ or S for ‘spare wheel’ or W for ‘wheel’ or J for ‘jacking’ or T for ‘tyre’ or even F for ‘flat tyre’. Nope, it was listed under H. For ‘How to change a wheel.’”

(Rod Easdown, ‘Put control to manual’, *The Age*, 10 December 2009.)



Scenario 4: TOC index

You are offered the job of indexing a book that is arranged by paragraph and section and that has a very detailed table of contents. You are instructed to index at the heading and subheading level and to use only the author's terms. The index could be done simply by reading in the TOC and converting it to alphabetical order, with negligible need to check the text.



Scenario 5: A client puts down another indexer

You come back from a business trip to find a voicemail from an editor you haven't worked for before, asking about your availability. When you call back to let her know that you are free on those days, she says, "Oh, great! I'd actually already given it to another indexer, but I heard from Joe Blow that you're better, so I'll cancel my arrangements with her and give it to you, instead."



Scenario 6: Slipping quality

As a publisher, you find that the quality of work of one of your stable of indexers seems to be slipping. Over the years authors have been very happy with her indexes, but lately a few authors have complained about typos, inconsistencies, missed items and some areas seeming to be heavily indexed while others are skimmed over. You call her to talk it over, thinking perhaps that she may have had personal issues, and learn that, in fact, as she grew busier, she began subcontracting regularly without telling you or her other clients, some of whom you recommended her to.



Scenario 7: Strong beliefs

A friend of a sibling asks if you would index her book on child nutrition in a few months when she has finished writing. Normally you would ask to see some sample chapters, but she catches you in a good mood on a busy day, and after the two of you negotiate prices and timelines, you put it in the back of your mind. A few months later the pages arrive, and as you begin indexing you notice two things. First, the book is rife with typos. She is self-publishing and appears not to have had it edited. Second, you are dismayed to discover that she feels very differently about child nutrition than you do—in fact, you consider that much of her book contains misinformation.

**Summary of ‘Running an indexing business’,
Panel: Heather Ebbs (Canada), Mary Coe (Australia), Tordis Flath (NZ), Pilar Wyman (USA)**

Pilar is a sole trader, and made a decision not to employ subcontractors.

Mary is a sole trader, and has employed subcontractors in the past.

Heather is a sole trader, and works in indexing, writing and editing.

Tordis is a sole trader, and works in indexing and proofreading.

Their careers in freelance indexing work in the publishing industry have developed around their extra commitments.

On the topics of

“How to keep work flowing in; How to keep existing clients; How to gather new clients:

- Join and/or attend the meetings/conferences/... of other societies/ associations/... e.g. societies of editors, local business associations.
- Professional networking and personal contacts are crucial.
- If you work in a specialist area, then go where the specialists go.
- Search out organisations that might use your services and the best person there to contact, write or email them, leave it a week or so, then ring them. This has a reasonable uptake rate.
- Use any excuse, like a new address, to re-contact them.
- Maintain your relationships with current editors/clients. Perhaps by sending them a Christmas card each year.
- The NZ Freelance Indexers Directory is emailed to all the publishers (or equivalents) in NZ each year.
- Do not overlook international work, the time difference is often a plus here.
- Work ON your business as well as AT your business, i.e. allow time for business development.
- Indexing should be seen as an integral part of publishing, not just an add-on.
- It is good to have a backup job/ income (e.g. proofreading) when starting up as a freelance indexer.
- Personal websites work for some people, but not for others. They require on-going work to be successful.
- Use facilities like LinkedIn, Google profile, Indexers Available, ... to get your name and skills known more widely.

Employing subcontractors:

- You have to be happy to ‘manage’ staff.
- You have to maintain quality.

Looking after yourself:

- Indexing requires intense concentration.
- Take frequent breaks.
- If you do not like the pay rate, say no.
- Value your expertise and knowledge, and ensure others respect them.

From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

Archiving History for the Future in Pacific Islands

Uili Fecteau

Intro

History moves in one direction. Archival items document the passage of time, but are also subject to the same forces of nature that cause deterioration, decay and hopefully re-birth.

It is the basic premise of this paper that 'things' will lapse into decay unless energy/effort is exerted to create or maintain an order or structure. This paper focuses on the most recent exertion of energy on a collection of archival documents from the German Samoan Administration, and how the future of Archives in the Pacific might look.

1. Context

Archival documents that hold evidence of personal interactions between Samoan, German, American and British Nationals, from the end of the nineteenth century to the early twentieth century, are held in repositories in Apia, Samoa, and Wellington, New Zealand. The focus of this paper is one sub-set of this group of records - the German Samoan Administration records from 1900 to 1914.

The collection of administrative papers of the German Imperial Administration of Samoa (1900 to 1914) represents a fading insight into the cultural, political and economic machinations of four countries during an unprecedented time of international change and upheaval leading up to World War One.

These files were created by the Imperial German Administration of Samoa, they document day to day interactions between the Administration and the people of Samoa in early twentieth century Samoa. They document subjects as varied as Staff and 'Native' employees, Official Dwellings and Government buildings; and Treasury records. Trade and Communication files document immigration and emigration statistics and correspondence between Samoa, Germany, Britain and the United States of America. Physically, they constitute paper files, Registers, maps, plans and photographs.

The collection has largely been bureaucratically and socially buried since 1914, when the New Zealand Army claimed German Samoa on behalf of the Allied forces during World War One. Most files are extremely fragile and mostly in the hand written script German language of the early twentieth century, making them physically and culturally difficult to access.

Here is an attempt to briefly describe "What is Where?" of all of the Official Archival records created in Samoa by German, Samoan and British Officials from the late nineteenth century to the early twentieth century:

- Wellington, New Zealand – Archives New Zealand – 6 groups – Samoan Government (Samoa-SG); German Colonial Administration (GCA) (old and new systems) un-listed, the biggest (but only half of the files); British Consulate of Samoa (Samoa-BCS); Archives of the German Consul (Samoa-GCS); British Military Occupation of Samoa (Samoa-BMO) (including High Court files) and Archives of the New Zealand Samoan Administration (NZSA).

- Apia, Samoa – O.F. Nelson Library. Imperial Government of Samoa (IG) (Half of the GCA records held in New Zealand); Imperial District Office in Apia (IDO); Imperial District Court (IDC) (similar structure to Samoa-BMO files); Imperial High Court (IHC) (similar structure to Samoa-BOM?) and DHPG files (company files? 1913-1921).
- Various registers and files are also dispersed through various Samoan Government departments in Samoa.

2. Turning the tide of Archival Entropy

Any archives in the Pacific have had the forces of nature against them from the beginning. High temperatures and high humidity are two of the most fundamental elements that must be controlled in order to physically preserve paper records from turning into compost on the shelves.

Over the years, many individuals and organisations have contributed to rescuing, maintaining or reconstructing this collection of archives. Since their creation, the German Administration kept the filing system maintained, updating to a more extensive system in 1906, coinciding possibly with the employment of an Administration typist. In 1914 the New Zealand Expeditionary Force (NZDF) captured Samoa on behalf of the Crown as part of WWI and many of the files were ransacked. Some were translated, others were picked up and used by the British Military Occupation force, to administer the court judicial process for example, and the Land and Titles Commission; many remaining files were discarded or abandoned.

The shift of the files to New Zealand began in 1920 when Dr. G. H. Scholefield found the British Consul material in a 'perilous state, suffering from damage by damp and insects and subject to removal by 'interested collectors'. In 1955, Mr R. P. Gilson discovered additional material 'lying derelict in government offices in Apia'. These papers were from the Old Samoan Government and the main bulk of the German Administration. These files were also shipped to the archives in New Zealand.

Once in New Zealand, these records were accessioned into different categories but not listed cohesively until 1975. Ashby Fristo, from the University of Hawaii, compiled a detailed annotated listing of the files held at the National Archives of New Zealand.

In 1977, more than 140 boxes of files held in a disused prison cell in Mulunu'u came to the attention of some researchers. These records were re-housed into the O.F. Nelson Memorial Library in Apia, and are now in the care of the Samoan Archives staff.

In the late 1980s, the Bundesarchiv in Berlin funded a microfilming project that saw the majority of the New Zealand held collection, making research of at least part of the collection possible without damaging the original material. The project saw files disbound and each page numbered. This of course was still only half of the story.

In an effort to digitally capture the documents held in Samoa, for future research, the German Federal Government funded a digitisation project in 2009 to copy this collection of records held in Apia Samoa. Part of the process involved after the documents are captured, these images are shipped to Wellington for added processing and then forwarded to Berlin.

As a result, I was working with the images coming out of Samoa and trying to understand how they fit with the original sequence of records. It wasn't until a German researcher visiting Archives New Zealand showed me the original file register of the GCA that I was able to potentially piece things together.

3. Reconstruction

The exciting part of this paper is being able to talk about the reconstruction work possible now. With the files dispersed between Apia and Wellington, I found I had some tools at hand to attempt to turn the tide on the entropic effects this vital set of records has been subject to.

I am using the original German file register from 1914, which is essentially the overall list of what they created in their main filing system; and ticking off essentially the records that made it to New Zealand by using Ashby Friso's listing, and what remained in Samoa from the listing they've done in Apia. I am further able to double check the New Zealand held files by going downstairs to check the originals, and the Samoan held files from the files that have been digitised and sent over to Wellington. From this process, I am able to locate what is in New Zealand, what is in Samoa, and what is potentially missing.

Examples of challenges I have encountered while working with this collection:

- Being an English speaker working with records that are mainly in the German and Samoan languages
- Reliance on third party sources
- Understanding the Governmental Structure the Germans created to work with existing Samoan political structures.
- The fact that this is still only one side of history that has been recorded. Much more has not been captured due to the oral tradition of Samoan society.
- Maintaining and communicating the enthusiasm about this seemingly slow moving project.

Some gems I have come across:

- Poll tax correspondence
- 22 Chinese Labour files
- Probate of notable figures in Samoa in the early 20th Century
- Births and Deaths Register
- Personal Diary of the last German Administrator leading up to the taking of Samoa in August 1914.

The future potential of this work lies in being able to list all the files on our online finding aid, Archway. From there, it would be possible to attach the digital images being scanned in Samoa, making them researchable by a wider body of scholars and researchers. The work that would then be possible to facilitate would be translations, summations and the indexing of individuals for genealogical and historical mapping. Much of this useful data could be added to the descriptive field of the listed records.

Having the body listed online would enable a structure for a digitisation on demand service/programme to be run, where files from the Wellington collection could be digitised and posted as requested. This moves the outstanding digitisation required to potentially become part of a business as usual scenario, as opposed to a project that is subject to restricted resources and threats of pulled funding.

I have found many insights into the German Administration through listing them electronically. I have been able to identify some real characters and significant geological, social and political events that would benefit from further cross cultural research.

I believe that digitisation is not the end point of archival aspirations in the Pacific. That helps archives to be accessed by a wider audience, but it is the description and thus the discoverability of information that enables people to find what they're looking for. That is what builds a path to understanding, growth and re-discovery.

Typesetting dilemmas

Tordis Flath and Mary Russell

Tordis discussed problems of people “messing with my index” – the horrible things that can happen to an index after it has been sent to the publisher. One solution is to establish a dialogue with the editor. Indexers, typesetters and editors are all members of the same team so why not work together?

The best person to make changes to an index is the indexer, who knows better than anyone what can be cut or changed. Proofing is best done by the indexer who can see at a glance if something’s gone wrong in typeset. Tordis suggests asking for a proof of the finished version. This is a service to the publisher so therefore as added bonus as well as a ‘peace of mind’ check for the indexer.

Examples of things that can go wrong:

- Subheadings turned into headings because indents are lost – the index is thrown out of alphabetical sequence into a jumbled list)
- No page numbers (the example from 1862 was replicated in facsimile in 1979)
- Strange page and line breaks
- Indents jumbled left and right making the index unreadable
- Bold locators turned into ordinary ones
- Search and replace function applied to index (the example was **gay** replaced by **same-sex**).

There was a general discussion about how such changes could occur between programs. Indexing software applies formatting which should carry through, RTF files rather than DOC files should be supplied, along with a PDF showing how format and layout should appear.

Many indexers don’t see the finished product until after the book has been printed and by then it’s too late.

Tordis suggests a PDF of the index should come back to the indexer – it only takes 15 minutes to check it if you are familiar with how it should look, so although the indexer is last in the queue and there’s always a tight time pressure it’s actually quicker to have the indexer do the last proofread.

There was a lively discussion, with input from typesetters and software people, about how any changes should be marked up at that stage. A PDF is not the source file but it can be marked up in such a way that the editor and/or typesetter can easily make the necessary changes.

- Adobe Acrobat Pro allows comments and mark-ups to the PDF but is expensive
- Crocodok.com is a site where you can upload and edit the file
- PDF Pen is a very cheap MAC programme which does the same thing.

The process is a typesetting issue and is dependent on the system the RTF file is dropped into – as a general rule tabs rather than indents should be used.

Not all indexers have had issues, it depends who opens and gets their hands on the file after it's received by the publisher, and usually it's opened by an editor.

It's useful to preface the index with a style note – e.g. locators for illustrations are in bold – so the editor/typesetter is alerted to what they should be seeing.

A good editor will spot check the content, a good typesetter will check the style.

There can be issues with *continued* – useful from page to page, not necessary from column to column, and when the column width or length is adjusted there can be flow-over issues. The old systems often generated *continuation* headings, in the new systems they have to be inserted manually.

InDesign has a plug-in available, Cindex and Sky add styles, an RTF should usually carry them through.

It was felt that in an ideal world a typesetter should be going through the index line by line but that costs time and therefore money – both are often in short supply at that stage.

Tab versus style – RTF files converted to InDesign map styles, and InDesign people prefer styles.

Coding is specific in online indexing – tagging codes are developed for each job. Quark, InDesign and Venture use tagged text. Word styles are usually personalised to individual computers and sometimes printers.

General consensus was:

- Send the index as an RTF
- Send a PDF of how it should look
- Ask for a final proof copy as a quick check.

The potential for computer/system error is always there. Human error always creeps in. The task is to figure out ways to combat and eliminate both.

The author, editor, indexer and typesetter should be working as a team and using each other's skills to best advantage.

Can an index be a work of art?

Creating an index of heightened sensations: a report on the collaboration between a skilled indexer and a creative writer to produce a special-purpose index

Lynn Jenner and Tordis Flath

Abstract

Lynn Jenner has recently been writing a four part work about human responses to loss, called *Everyday Life in the Ancient World*. This project was her PhD thesis in creative writing at the International Institute of Modern Letters in Wellington. In 2012-13 Lynn and Tordis Flath collaborated on an index for *Everyday Life in the Ancient World*. The index was intended to be a creative work in its own right, containing poetic elements as well as performing the more conventional functions.

The presentation reports on the collaboration between a skilled indexer and a skilled creative writer to produce an unusual and interesting index that aspires to be visually attractive, contain beauty and provoke emotion and thought, as well as helping a reader find material. Would the functional elements and the creative elements undermine each other or complement each other? What percentage of functional elements and what percentage of creative elements would work best? These are questions we have considered during the collaboration.

Introduction (Lynn)

In this presentation Tordis Flath and I will each talk from our own perspective about the collaborative task of making a special-purpose index for my PhD thesis. We did this work in January 2013.

We will each speak for about ten to fifteen minutes, leaving time for questions at the end of the presentation.

The two questions below, which I mentioned in the summary of this presentation, will be hovering over the presentation.

1. Can creative writing be easier to navigate, more interesting *and* more beautiful with an index?
2. How far can the core notion of an index be pushed while still retaining its usual functions?

It would be fair to say that my interest is mainly in the first of the questions.

I will start by outlining the creative work for which the index was made, and my goals for the index. I will also read some small sections of my thesis text, so that you can get a sense of its character. I will also explain why I have called the index an 'index of heightened sensations'.

Aims of the creative work

I am a student in the PhD programme in creative writing at the International Institute of Modern Letters at Victoria University, Wellington. In this programme students write a book-length piece of work in any genre, and usually a critical exegesis to accompany the creative work. My project combines creative and critical elements. The index Tordis and I made was an index of my hybrid creative and critical text.

This text is itself a relatively unconventional work.

My intention in the thesis was to create four text objects, designed to resonate with each other as objects in an art exhibition do, each object capable of standing alone, but forming a larger picture when placed side by side. Each of these is called a Re-Collection. I hoped that this structure would give me the opportunity to use form differently in each piece, but always acting out a rejection of completeness and simple interpretations. I aimed to place different topics in the foreground in each piece, but join the four parts and their various sections of content through their relationship to loss, search and re-construction.

Read 'Hair'

These texts are not 'easy reading'. For readers, I hope that these four texts will generate an active reading experience, sometimes relatively puzzling and at other times clearer, from which a reader will emerge with his or her own interpretation of what the collections mean at the time of reading and in the circumstances and place of that reading.

In the current order, the index is the final of the four Re-Collections. The first three texts include poetry, dialogue, oral history, memoir, newspaper articles, short stories, little anecdotes and critical analysis of some books.

Read 'This Crazy Thing a Life'

Aims for the index and some constraints

The index is intended to be as much a piece of creative and critical writing as the other three texts.

At the beginning of this exercise I struggled to explain to Tordis what I was trying to achieve with this index, because I did not fully understand exactly what I wanted myself. I came up with this description:

1. The index should fulfil a reader's expectations for help with finding material.

2. The index should intersperse these entries with the names of objects and phenomena chosen for the beauty of the words.
3. The index should sometimes surprise a reader with entries which are a little quixotic.

During the process I realised that I wanted the index to have the same emotional range of tones as the other three texts. I was not surprised to find that ideas about the index developed during the writing of it. All of my writing is iterative. I have an idea. I try it out. I look to see what works and what doesn't. I then pull the work further in the direction of the aspects that are working and drop aspects that are not working. I do this many times to make any piece of writing. The index worked in exactly this way.

From the beginning I wanted the index to display the preoccupations of the other texts; remix these alphabetically and remind readers of relevant dates, books, authors and places. It was to be the ultimate list in writing with a clear interest in lists. It would be the 'whakapapa' of the work too, reciting the names of books and writers and events which have gone before, making possible and eventually causing, the birth of this work. The index was also to fulfil the conventional requirement to help readers to locate particular topics in the texts.

Show and discuss 2 pages of the index

Thesis pages 263 (hair) and 265 (loss)

The fact that this index was to be part of a PhD brought with it the requirement that the work needed to be mine. At the start I approached Tordis with a request that she mentor me as I wrote the index. I had no previous experience at constructing an index, and I decided quite quickly that the specialist software was too complex to learn in the short time available. We settled on a process which had Tordis acting as a consultant about indexing, and physically constructing the index but me taking final responsibility for the selection of entries and therefore for the artistic tone of the index.

The fact that ultimately the author of the text has selected the entries for this index takes away the 'objectivity' that professional indexers aim to bring to the task, and puts in its place another opportunity for the author to emphasise some things and reduce emphasis on or remove other things for artistic reasons.

I have, for example, indexed fictional characters as if they were people and I have used the descriptor 'Holocaust survivor' to emphasise this aspect of certain people's lives. I have not indexed individual Nazis such as Felix Landau and have not focused much on Nazi activities such as concentration camps. Certain possible headings such as 'Holocaust' have the potential to overshadow other subjects. With this in mind, I have kept the heading

‘Holocaust’ very brief in the index, although it occupies probably 100 of the 300 pages of the thesis. I wanted the index to contain qualitative and phenomenological aspects of the Holocaust rather than convey any suggestion that I have written an overview of the whole subject.

At one stage my supervisor suggested I index the concept of loss. I attempted and failed to do this since it pervaded the whole work. I have commented on this in the index. I have focused on historicity, on processes and on equipment. I have also focused on books and activities associated with books.

This week, in my reading, I came across a description made by the writer W.G. Sebald of his use of symbols in his writing. Sebald described his use of symbols in an interview with Eleanor Wachtel:

People always want what seem to them to be symbolic elements in a text to have single meanings. But of course that isn't how symbols work. If they are any good at all they are usually multivalent. They are simply there to give you a sense that there must be something of significance here at that point, but what it is, and what the significance is, is entirely a different matter. . . I think that it was a question of trying to find, in a text of this kind [The Emigrants] ways of expressing heightened sensations, as it were, in the form of symbols which are perhaps not obvious. (Wachtel 53)

He called these words-as-symbols ‘moments of heightened sensation’. That seems to me to be a very good summary of the governing principle behind the selection of entries for the index Tordis and I have made. What is ‘in’ is what makes your heart beat a little faster, or maybe what makes you sit still for a moment to notice or enjoy a feeling.

Where to from here for the index?

Since the thesis version of the index has been written, I have found myself using the index to find things in the text, so I know that, for me anyway, it works for this purpose. As far as whether it achieves its artistic aims, I am not sure. I am not concerned about this lack of certainty, since it is a common feature of my writing that I am slow to come to a steady view of its successes or otherwise. In this case, because this is a PhD, I will be helped by receiving some feedback on the whole work, including the index, from three examiners. Based on that I will finalise the PhD version of the project. After that I will consider whether I would like to make changes in the whole set of texts for commercial publication. One possibility I have been considering is to remove a certain percentage of the less significant references to people and places, and by doing that, to change the emphasis on the original three goals towards numbers 2 and 3.

Tordis's contribution

Because of the requirement of her PhD that Lynn 'creates' all the work, this index was very different to my usual projects in that I was acting in a consultative/teaching role to Lynn. I explained how to index the text and indexing rules, we used my copy of SKY Index to compile the actual index and I guided Lynn through every step of the way but I did not actually select the entry terms or compile the index as such.

Process

Initially we thought that our process would involve:

1. Lynn will finish each of the three chapters and then mark up her headings.
2. We will have a meeting to do 10-20 pages together.
3. Tordis will then enter all the headings into SKY Index and make a note of any additions/suggestions.
4. We meet again to discuss what's been entered and what's been omitted.
5. We complete each chapter.
6. We edit/review the index as a whole and make style changes together.

We started out the first day with Lynn bringing along some marked up pages of the first chapter and she sat beside me at the computer screen as we began to enter them into the index file. We discussed the entries and I typed them in. As we went along I explained how the index might work and what I 'usually' did. We initially just entered any entries she had marked up, working our way through the marked up pages.

Once we completed all the pages Lynn had marked up for that session, I printed out a draft of the index to date. This gave Lynn an overview of how the index was going to look like. She then took that away to study and mark up the next batch. Meanwhile I had a thorough read of the text we had worked through and noted any additional entries or consistency issues. My read through of her complete text gave me an overview of what she was doing and how the index was shaping up. When she came back for the next session, we first discussed my suggested additions and changes, and then her changes, each time making the changes to the index, and then worked through her latest batch of marked up pages.

We initially thought once Lynn had got the hang of marking up the entries that I could just enter in a large pile of pages for each chapter but the collaborative process worked so well that we never got to this point.

The work was very intense, especially for Lynn, and after about 20-30 pages, we would schedule another session. We had several days where we did a couple of sessions in one day with longer breaks for lunch and Lynn going away to mark up more pages and my reading through the work, and then coming together again to revise and carry on. After each session, I would print out the latest version of the index for Lynn to peruse.

Once Lynn started to understand how an index works, her entries changed. Each time we saw each day's version, it helped to form our overall picture of the index and what parts needed to be emphasized more or less in terms of the three goals.

Unusual headings

Lynn created what I would term 'unusual' headings in the index for things she wanted to emphasize in the text. For example, she created a heading called "activities". Initially some of these were activities of the author and others activities of other people in the text. Later she moved away from putting them all under activities and we changed the heading to "activities of the author" and put the other ones under main headings like:

- "thrifting"
- "backshadowing"
- "carrying home the body of someone important"
- "categorising silences", and
- "deliberate ignoring".

She also created entries for interesting or beautiful phrases like:

- "fog of awareness"
- "sweetness, almost all gone"
- "apple blossom petals"
- "warm scented winds"
- "anxiety of influence".

Whenever pieces of the text like this struck me, I would point them out to Lynn for possible inclusion. In this way, it was quite a creative process for both of us as well.

Indexing fiction

It was quite different to indexing non-fiction books. I was able to draw on my experience of indexing *I have what I gave: The Fiction of Janet Frame*, which dedicated a chapter to each of her books. I had indexed the fictional characters in this book as some of them featured in several of her books and seemed relevant to students of her work.

Some of my comments about this also featured in an article on indexing fictional characters in non-fiction works in *The Indexer* by Madeleine Davis. I have recently been asked to quote to index a book of prose which will no doubt be very interesting. I gave Lynn this article and the Janet Frame book to read before we started.

I found this project very interesting and greatly enjoyed working with Lynn.

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Recently I heard of an author-written index in a book of poetry. I have not yet seen this index - Riviere, Sam. *81 Austerities*.

1 SKY Index – Introduction

SKY Index (www.sky-software.com) is a Windows-based indexing program designed around a database system. The current version is SKY Index 7. Index entries are added to a table in order of entry, and a sorted alphabetical version of the index is displayed in a separate panel. Index entries can be edited, duplicated and inverted, and the program will check for duplicate entries, missing cross-references and other possible errors. Output is available in a variety of formats including RTF and HTML.

A Demo version of SKY Index 7 is available in which the number of entries is limited and some functions are disabled.

I will be describing the features of SKY in terms of the menu system. Users should note, however that there are toolbar buttons and keyboard shortcuts for most of these.

File menu

SKY uses a file format with the extension .SK7. This is a variant on the Microsoft Access database file format, and renamed SKY files can be opened in Access if necessary. SKY 7 can open and convert indexes from earlier versions, which have an .SKX extension, and SKY can also read and write various kinds of text files including CINDEX formats. Most SKY Index settings, including a spell-check dictionary, are or can be saved as separate files on disk, making it possible to load specific groups of settings for individual indexing jobs. SKY files can be merged into a single index, compacted to a smaller size, renamed or – in the case of damage – repaired. Like Microsoft Access, SKY saves changes as it goes, so there is no need to remember to save. Users will still want to back up occasionally, however; this creates a file copy showing the date and time and stamped with a *.sk7backup* extension. This should preferably be stored in a physically distinct location (e.g. online or on a network server). To re-open a backup file in SKY the extension must be changed to .sk7.

Only one file can be open in SKY at a time, but several copies of SKY can run at once with one file open in each. Records can then be copied between them using the Edit menu or the Copy and Paste keyboard shortcuts.

Entering and editing

SKY uses a tabular layout with a minimum of two columns – one for the entry and one for the locator (page number). The locator column is also used for cross-references (*see* and *see also*). Additional columns can be shown for subentries and subsubentries up to 6 levels. Columns for information such as Record Number, Creator and Creation Date are normally hidden, but can be displayed via the View menu.

Entries are normally added by typing but can be entered via cut and paste or through AutoEntry, where one or more of the cells from the previous line are duplicated automatically as the user moves downwards on to a new line. Entries appear in the order in which they are added, but can be sorted at any time into alphabetical order or page number order (in which cross-references appear sorted alphabetically at the end). SKY also supports an AutoComplete option, in which the program will try and ‘guess’ what you are typing and complete it for you.

An optional ‘smart quotes’ setting converts straight quotation marks to curly quotes automatically as they are entered.

The Character Map applet, available through the Tools menu, can be used to select special characters in a range of fonts. These can then be cut-and-pasted into the index.

Existing entries can be cloned or edited in a variety of ways: the most common of these are:

- Duplicate – clones a copy of the entry at the end of the index [Ctrl-D]
- Duplicate and swap – clones a copy and swaps the main heading and the first subheading [Ctrl-F4]
- Promote subheading – moves a subheading up to the end of the heading or subheading on its left [F5 or Ctrl-F5]
- Demote – moves a word or phrase from the end of a heading or subheading into the next column on its right [F6]

Locators can be edited via the keyboard as follows:

- Numeric keypad plus or minus – increment or decrement page number by one
- Comma after page number – duplicates entry and places the cursor in a blank locator cell
- Ctrl-comma – decrements page number or first number in range
- Ctrl-period – increments page number or first number in range
- Alt-comma – decrements page number or second number in range
- Alt-period – increments page number or second number in range

Cross-references can be flipped between ‘see’ and ‘see also’ with Alt-Ctrl-T

Formatting menu

Text within entries can be selected and formatted in various ways:

- Italics, underlining and bold
- Change case – the case of the heading or subheading can be changed to upper, lower, initial caps or (smart) title case
- Alternative fonts are available for emphasis or other special purposes
- ‘Ignore text’ prints but doesn’t sort: i.e. if the entry was ‘The Kid’ and ‘The’ was ignored text, the entry would appear as ‘The Kid’ among the Ks in the finished index
- ‘Hide text’ sorts but doesn’t print: i.e. if the entry was ‘nineteen-twenty1920’ and ‘nineteen-twenty’ was hidden, the entry would appear as ‘1920’ among the Ns in the finished index
- ‘Note’ text is both ignored and hidden

Hidden and ignored text is shown in different colours in the SKY edit panel.

Utilities menu

The Utilities menu is a mixed bag of tools:

- Copy/Paste Locators – collects all the locators associated with a particular heading and duplicates them for another heading; can be used, for instance, when two terms are synonymous.
- Consume subheadings – removes subheadings for the selected entry.
- Convert cross-reference – replaces a cross-reference to another entry with the page numbers

for that entry.

- Create reciprocal cross-reference – uses an entry A with a *see also* cross-reference to an entry B to create a new entry B with a *see also* cross-reference to entry A.
- Create subheadings from locators – copies the locators for that entry into the subheading column.
- Propagate edits – where the user has modified one instance of a heading or subheading, this will modify all the other instances accordingly. Usually done through the keyboard shortcut Ctrl-Alt-Enter.
- Split – where a long entry is broken up by delimiting characters (e.g. commas), the Split utility will break it up into multiple single entries with the same locator: thus with *Harry Smith; Tom Lewis; Sarah Jones*, ‘Sarah Jones’ will be split off with the first split operation and ‘Tom Lewis’ with the second. The delimiting character can be specified under Options/Preferences (see below). Alternatively if the cursor is placed in the middle of an entry and Split is selected, the entry will be split at that point.
- Swap Acronym – where an entry is in two parts and one part is in parentheses, this will swap the order of the parts and place the parentheses around the other part: e.g. ‘Welsh Rarebit (Cheese on toast)’ becomes ‘Cheese on toast (Welsh Rarebit)’.
- Toggle See and See Also – switches the type of cross-reference back and forth.
- Update AutoComplete – uses the current set of index entries as input to the AutoComplete dictionary, which attempts to ‘guess’ what you are typing.

Search menu

The Search menu in SKY brings up a large range of options for finding, marking and replacing text. Some of the features available are:

- Repeating a previous search. Searches carried out during the current session are remembered by the program. Frequently-used search settings can be saved to disk and called up as required.
- Boolean logic - users can search for criteria linked with And or Or, or exclude items from the search with a Not option
- Searching can be limited by style, format or field
- Pattern matching – when this is on a wide range of text patterns can be searched for by using wildcards and other pattern elements: e.g. ‘[0-9][0-9]’ searches for any combination of two digits. Replacement text can also use pattern matching: e.g. the two digits once found could be swapped around.
- Group results – displays all the found results and filters out the others.
- Find all pages for entry – displays a list of all locators from entries matching this one
- Go to entry, locator or record – takes the user to the first matching entry, locator or record. For entries the user only has to type the first few characters – e.g. typing ‘Ca’ will take the user to ‘Castlemaine’.
- Browse – brings up a third vertical pane where the user can move through the records by typing the first few letters of each entry. The Backspace key allows the user to modify their search term, and Enter leaves Browse and makes the selected record the current one. Pressing ESC drops out of Browse mode without making any changes.
- Return to Last – moves the cursor back through the index to the previously selected entry.
- Manage Saved Searches – allows the user to open and use a list of previously saved search

settings.

Group menu

The Group menu allows the user to filter out unwanted records and focus on a subset. The subset will remain current until the index is re-sorted or Ungroup is selected.

- Group using find – equivalent to Find (from the Search menu) with the Group option switched on. Filters out non-matching records and displays the remainder.
- Group on current – displays all records containing the text in the currently selected field.
- Group on text – allows the user to type in text which is used to filter the records.
- Group on locator – finds all records with a particular locator or within a range of locators.
- Group on active label – see Labels below.
- Ungroup – removes the filtering criteria.
- Refresh group – reapplies the criteria to any records you may have changed.

Labels menu

SKY supports up to nine ‘labels’ for index entries. These are represented by different colours for the background to the index entry line in the table. Users can also define their own names for labels.

Available options are:

- Toggle active label – applies or removes the active label colour (Label 1 by default) to the selected entry or entries.
- Group on active label – hides all entries which don’t have the currently active label colour.
- Go to next active label – jumps through the text to the next entry with the currently active label.
- Set active label – allows the user to specify which label is active.

Index menu

- Resort – re-sorts the index in a specified order.
- Subheading levels – allows the user to add or remove subheading levels. This can also be used to hide existing subheadings for review or error checking.
- Generate – create an output file (e.g. text, RTF or HTML) containing the index entries.
- Edit/Print – create an output file as above and open it for editing or printing in a word processing program. SKY looks for Word by default but can use Microsoft Write or OpenOffice Writer.

Tools

- Add prefix/suffix – adds a prefix or suffix to the specified field in selected entries: e.g. it can add ‘Vol 1:’ in front of all the locators.
- Character map – opens the Windows Character Map application, allowing the user to find and copy non-keyboard characters such as pound signs, copyright symbols and accented characters.
- Error scan – Scans the index for common errors and problems: improperly formed entries, cross-references or subheadings, etc.

- Proofing report – generates a text file showing the currently grouped records in the currently selected order.
- Remove duplicate records – deletes any records that are identical to previous ones.
- Spell check – runs a spell check on the index in order of entry. Unrecognised words can be added to the dictionary as they are found. (It is usually easier to spell-check the completed index in a word processor, however.)
- Statistics – provides a summary of the length of the index, the working time, and other valuable information.
- Add/remove volume/chapter labels – where indexes have been prepared separately to each volume of a multi-volume work, this allows a volume identifier to be added to each locator in the index before the files are merged.
- Change page number – allows the user to specify an altered locator for a selected group of records.
- Renumber pages – Where one or more pages have been added to or removed from the material being indexed, the indexer can use this to adjust the altered locators up or down by a fixed number.
- Repaginate – assists in combining the indexes when several chapters or volumes, each numbered from page 1, are combined into a larger document numbered sequentially – i.e. if Volume 1 runs from pages 1 to 150, the first locator in Volume 2 will be changed from '2.1' to '151'.
- Tip of the Day – see Help, below.

View

The View menu contains controls relating to the sort order of the entries in the data table

- Toolbars – toggles the display of each of the seven built-in SKY toolbars.
- Keep columns equal in width/Equal column widths – controls the display of columns in the Edit table.
- Record numbers/Creator/Editor/Date created/Date edited – toggles the display of additional columns in the Edit table.
- As entered/Page ordered/Sorted – controls the sequence of records in the Edit table.
- Grouped – re-applies the last grouping criterion.
- Filtered – allows the user to screen out entries based on their label, their creation date, the creator, or other kinds of information.
- Edit View – hides the Edit table and allows users to work directly in the alphabetical listing of entries as they will appear in the final index.
- Refresh – reloads the current display of entries.
- Reveal codes – opens a panel at the bottom of the screen showing any formatting codes applied to the entry (e.g. italics) as their RTF equivalents.

Help menu

The SKY Help package includes a comprehensive guide to all options and commands, a Tip of the Day system (under the Tools menu), and a PDF Users' Guide of 289 pages. The help system is searchable, and a keyboard template and 'cheat sheet' is supplied with the package and can be printed out via the SKY Software menu in Windows.

Options menu

There are numerous options in SKY, divided into four setting levels and five ‘Managers’ for settings that can be applied to multiple indexes. These are covered in more detail in the Advanced course, but we will look briefly at some of the categories here:

Preferences

Preferences are program settings that remain the same every time the program is used. They include information about the location of files, user information, measurement settings and so forth.

Data entry

Data entry settings involve common short cuts for typing entries and locators. They include settings for AutoComplete, automatic capitalisation, and so on.

Document

Document settings control the way in which the generated index document is laid out – page size, margins, header and footer, etc.

Index

Index settings relate to that particular job, and include most of the conventions and standards that will be expected by a particular editor or client: position of cross-references, delimiters for locators, introductory text, indented or run-on, and so forth.

Managers

Managers are used to handle settings which are specific to particular kinds of work or particular clients. They allow these settings to be saved to disk, shared between multiple users, and modified to suit special requirements.

Acronyms

An acronym is an abbreviation which is expanded by SKY into a longer term: for instance an acronym ‘UN’ might be automatically expanded into ‘United Nations’. Expansion takes place automatically when the user presses SPACE, ENTER or TAB after typing the acronym.

AutoComplete

AutoComplete allows SKY to ‘guess’ what the user is typing based on entries they have already made in that index or elsewhere. The AutoComplete manager allows the user to retain or reload sets of entries to use for this purpose. The SKY Data Entry options can also be set to use the list as a ‘controlled vocabulary’, beeping when the user types an entry that is not already on the list.

AutoEntry

The AutoEntry manager allows the user to specify entries with subheadings that are always flipped and double-posted: for instance, if ‘definition: XXX’ always appears in conjunction with ‘XXX: definition’, entering the one can be set to trigger the entry of the other. ‘AutoEntry’ in the Data Entry Options must be on for this to work.

Macros

Macros are key combinations which trigger a sequence of actions which would otherwise require multiple keypresses. They are normally created by the user, though some pre-written macros are available from other SKY users. Up to 26 macros can be available at a time, triggered by Alt-Shift-[A-Z]. Macros are written in a simple programming language in which special keys are represented by keywords in curly braces: e.g. '{UP 3} {RIGHT} abc^v' means 'Move up 3 rows – move right – type 'abc' – type CTRL-V (i.e. 'Paste')'.

Translations

Translations are similar to acronyms in that they represent one block of text by another. While acronyms are converted immediately upon entry, translations are only converted when the index document is generated for editing. This can be useful where you are importing text into the index from another source; for instance, if you are importing an index compiled in the US which uses the terms 'color' and 'harbor', and you want to output these as 'colour' and 'harbour'. Naturally you need to be aware of any sorting problems that may arise as a result of using translations.

Load from/Save as template

Once a group of settings for a particular client or type of index has been established, it can be saved as a 'template' file on disk and recalled for use the next time that requirement comes along. Most professional indexers will have several templates available for different clients or different indexing requirements.

2 SKY Index – Advanced

In this section of the course we will go into SKY Index in more detail and look in particular at some of the options and keyboard settings. We will also examine the online resources that are available to SKY users.

Options – Preferences

General

- Automatically Load Last Index – This is the default behaviour of SKY Index.
- Seek Current Record When Changing Views – If checked, the current entry will remain current after sorting or grouping.
- Proportional grid scrolling – allows the user to scroll the grid proportionally by dragging the indicator on the grid's vertical scroll bar.
- Display preview pane on the left – If checked, the Preview Pane will be displayed on the left side of the data entry grid. Otherwise the grid will be displayed above the data entry grid.
- Include sort information when embedding – If checked, SKY Index will include forced sorting information when embedding entries into a word processor using drag and drop.
- Use Metric System Measurements.
- Adjust Punctuation – If checked, punctuation will be adjusted to remove trailing commas or full stops.
- Use Alternate Mouse Wheel Detection – You should leave this item unchecked unless you are having trouble scrolling with the mouse wheel.
- Generate strikeout text as small caps – If checked, any text that is formatted as strikeout will be converted to small caps when the index is generated.
- Start in Data Entry View – If checked, SKY Index will start in Data Entry View. If not checked, SKY Index will start in Edit View.

Data Entry Options / Text Colors

- Immediately verify cross-references – If checked, SKY Index will verify the existence of cross-references as soon as you enter them.
- Next page reminder – If checked, SKY Index will track how many entries you make per page and will display a warning that you may have forgotten to change the page number if you significantly exceed the average.
- Formatting replaces page field contents – If checked, when you apply formatting to the page field and the data entry grid is in view mode, the contents of the page field will be erased and the proper coding to start the specified formatting will be entered.
- Automatically create maiden name entries – If checked, SKY Index will automatically generate maiden name entries during data entry (i.e. 'Smith, Joan: @Adams generates an entry at 'Adams').
- Smart Quotes – If checked, any straight quotes that you type will be converted to curly quotes. This option affects both single and double quotes as well as apostrophes.
- Remove double spaces – If checked, all occurrences of two consecutive spaces will be changed to a single space. (Leading and trailing spaces are removed automatically.)

- Use Ctrl+A for Append New – If checked, Ctrl+A will be used for Append New and Ctrl+Ins will be used for Select All. This option is provided for backward compatibility with v6.0 of SKY Index.
- Use Ctrl+P for Duplicate and Swap – If checked, Ctrl+P will be used for Duplicate and Swap instead of for Print Draft. This option is provided for backward compatibility with v6.0 of SKY Index.
- Hidden/Ignored/Note text color – The color that hidden, ignored or note text will be displayed in.
- Promote/Demote Separator – When you use the Promote or Demote functions, you can specify the character or characters that you want to be used when combining the child heading with its parent heading. By default a comma and a space (,) are used for both.
- Split Separator – Specifies the character or characters that act as a delimiter when using the Split command.
- Split Count – Specifies how many delimiters the Split command should count backwards from the end of the heading text before splitting the text.

Program font, File locations and User info

These settings allow you to specify the font that the program uses, the location of your files – including backups – and information about yourself as the index creator. Note that when SKY is installed on a network system, it requires all its file locations to appear as local drives. You can do this for network locations by using the ‘Map Network Drive’ option in the Windows Explorer Tools menu.

Options – Data Entry

AutoCaps

Automatically creates an initial capital for the first word (or every word) of the specified field in each new entry. Note this will not effect entries that have already been typed. See also the index options for capitalisation of entries.

AutoComplete

When you start to type a new entry, SKY Index will monitor what you have typed so far and find all matching entries in the AutoComplete list. If more than one entry has been used before, SKY Index will suggest the one that was used most often. If there are two or more entries that have been used the same number of times, the one that was used most recently will be suggested.

- Main, Sub1 – Sub 6, Cross-reference – If checked, SKY Index will attempt to anticipate and automatically fill in entries that you type in the specified fields.
- Remove trailing text in parentheses – If checked, any trailing parenthetical text in the AutoCompleted text will be removed. You can override this setting by typing parenthetical text manually if an exception occurs in your index.
- Ignore Case – If checked, case will be disregarded when anticipating your entries. The anticipated entry will maintain its original case, but what you type will be compared to the AutoComplete list as if both were in all lowercase.
- Use as Controlled Vocabulary – If checked, you will hear a beep if you make an entry that does not exist in the AutoComplete list. New entries will not be added to the AutoComplete

list, thus maintaining the original vocabulary.

- **Save and Restore List** – If checked, SKY Index will automatically reopen the AutoComplete list each time you open the index.
- **Update when existing entries are edited** – If checked and you edit an index entry for which there is an AutoComplete entry, the existing AutoComplete entry will be edited to match your new entry. The intent is to automatically correct the AutoComplete list when you make a typographical error or if you change the phrasing of an existing entry.
- **AutoComplete Manager** – Opens the AutoComplete Manager, where you can add items to or remove items from the list. You can also save the list for use in another index.
- **Update AutoComplete List** – Clears the existing AutoComplete list and rebuilds it using all entries in the current index. This is useful if you've misspelled some entries unknowingly and you want to remove those misspelled entries from the AutoComplete list.

SKY Index ignores formatting when attempting to match what you've typed to entries in the AutoComplete list. If what you've typed matches an entry that has formatting applied, the formatting will appear, if the matching entry has no formatting, there will be no formatting. This means that you do not have to ever apply formatting for AutoComplete to match previously typed entries that do have formatting applied.

If you start typing an entry and it has formatting applied and you don't want that formatting, press Alt+F10. This will remove all formatting from all text you have already typed and will turn off AutoComplete so that you can type whatever formatting you want.

If you know in advance that you don't want SKY Index to anticipate your entry, simply begin your entry with a space. This effectively prohibits SKY Index from anticipating your entry. The leading space will be removed when you move the grid marquee to the next column.

AutoEntry

AutoEntry aims to automate double posting by detecting entries that should be automatically flipped and repeated, such as maiden names (see above). Where there are many entries that are always double-posted, these can

- **Ignore Case** – If checked, SKY Index will disregard case when examining the main headings of your index.
- **Ignore Formatting** – If checked, SKY Index will ignore formatting of main headings.
- **Use AutoEntry** – If checked, SKY Index will automatically double post records that have main headings contained in the AutoEntry list. If you don't want to use this feature, uncheck this box.
- **Create From Index** – Allows you to automatically create an AutoEntry list. SKY Index will examine the index that you specify for double postings and will automatically add the appropriate main headings and Actions. Swapped and promoted entries must be adjacent in the index for this to work.
- **AutoEntry Manager** – Brings up the AutoEntry Manager.

AutoRepeat – The Repeat Fields feature of SKY Index can save keystrokes by repeating fields in the index that seldom change. SKY Index can be configured to repeat any field during data entry, including locators.

Ignored Words

The Ignored Words list allows you to define words that you want to be ignored in filing when they appear at the beginning of an entry or subentry.

- Words to Ignore – To add words to the list of words to be ignored, enter them in this text box. After typing the word press Enter or click Add.
- Add – If you enter a word in the Words to Ignore text box, you can submit the word by clicking this button.
- Delete – Deletes the currently selected word in the Ignore Words list.
- Use Ignore List – If checked, SKY Index will ignore the words in the ignore list when they appear at the beginning of an entry.
- Not In Main Heading – If checked, SKY Index will not process the main heading field when checking for words to be ignored.

Smart Swap

When Main and subheadings are swapped, sometimes there are one or more words or phrases at the beginning or end of the subheading that should stay in the subheading field after the swap. In addition, these words or phrases usually get moved from the front of the subheading to the back of the subheading or vice versa. For example, ‘characters: in fantasy’ will be swapped to ‘fantasy: characters in’ and vice versa. The list entries at the bottom, in square brackets, stay on the same side: that is, ‘Smith: vs Jones’ becomes ‘Jones: vs Smith’.

Options – Document

These settings determine the properties of the indexing document generated by SKY.

- Margins and Layout – select page size and orientation, number of columns and margin size.
- Headers and Footers – controls the content and formatting of page headers and footers.

Output format / Markup tags

The Output Format tab allows users to generate indexes using coding that will satisfy most publishers. Presets are included for commonly used coding schemes.

Presets list – provides several preset code settings for quick configuration. If you choose one of these presets, the markup tags, if any, for the selected style will be automatically filled in. If you wish to define your own set of markup tags, choose <custom>. The available presets are:

- RTF – Generates a standard RTF file that includes information for bolding, italics, underlining, superscripting, subscripting, font, font size, paragraph spacing, paragraph styles, page size, margins, page orientation, headers, footers, and columns. You should use this setting if you are going to publish the index yourself.
- RTF Plain – The same as RTF except it does not contain information for page size, margins, page orientation, headers, footers or columns.
- RTF Spaces – Provides a minimal set of RTF commands that will generate an index that does not use paragraph styles for indenting. Unlike RTF and RTF (No Headers), these RTF commands can be edited as desired. By default, this preset indents subheadings with two leading spaces. Each additional subheading level is indented two additional spaces.

- RTF Tabs – Provides a minimal set of RTF commands that will generate an index that does not use paragraph styles for indenting. Unlike RTF and RTF (No Headers), these RTF commands can be edited as desired. By default, this preset produces indents via tabs.
- UCP (University of Chicago Press) – Generates an index that uses coding required by the Chicago Press.
- ANSI – Generates an index that uses coding specified by ANSI (American National Standards Institute).
- Plain Text – Generates a standard ASCII file which can be imported into any word processor.
- HTML – Generates an index that can be viewed with a Web browser. Note that this will still need editing and some find-and-replace work in a word processor in order to function as an HTML index.
- Quark Xpress – Generates an index that can be used with the popular publishing program Quark Xpress.
- (Custom) – Allows you to specify how the index will be generated.

Markup Tags

On occasion, you may need special codes to layout the index for publication. These are called markup tags. For example, your client might want you to start every main heading of the generated index with a special code such as <Main> and then maybe end each main heading with another special code such as </Main>. You might also be asked to use special codes to begin and end characters styles such as bold, italic, and underline. You will use SKY Index's Markup Tags feature to satisfy your client's needs.

The markup tags are divided into three sections: Document, Headings, and Character Style.

- Begin Document – This text will be placed at the beginning of the index when it is generated. Not all encoded documents require the use of this feature and it is prohibited for RTF documents.
- End Document – This text will be placed at the end of the index when it is generated. Not all encoded documents require the use of this feature and it is prohibited for RTF documents.
- Before Alpha Sep. – If you configure your index to print alphabetic separators, the text in this text box will be added just prior to printing the alphabet separator. Tip: This also allows you to indent the separator if desired.
- After Alpha Sep. – If you configure your index to print alphabetic separators, the text in this text box will be added just after printing the alphabet separator.
- Page Range Separator – Normally a range of pages is shown with either a dash or an en dash. When you generate an index using user-defined codes, a simple dash (–) character is used by default. If you want to use another character or if your publisher requires a special code, you can enter that character or code here. This option is unavailable for RTF output formats because, for RTF files, it is specified in the Style tab of the Index Options dialog.
- Filename Extension – This is the filename extension used when generating an index with user-defined codes. The filename will be the same as the name of your index, but with the filename extension that you enter here. You can enter up to 3 characters. For RTF documents, the extension is fixed as RTF.

- **New Line** – Specifies the character or characters to be placed at the end of every line of text. This should generally be set to the default value of CRLF, which is the way PC compatible computers end a line of text. This option is not available for RTF documents. Your options are:
 - **CRLF** – Adds a carriage return and a linefeed character to the end of every line.
 - **LF** – Adds only a linefeed to the end of every line. This is the way the UNIX operating system ends lines of text.
 - **CR** – Adds only a carriage return to the end of every line.
 - **<None>** – Does not add any characters to the end of a line.

Heading Markup Tags

- **Main (Begin/End)** – Text in the Begin text box will be added to the beginning of each main heading when the index is generated. Text in the End text box will be added directly after the main heading.
- **Sub1 through Sub6 (Begin/End)** – Text in the Begin text box will be added to the beginning of the specified subheading level entry when the index is generated. Text in the End text box will be added at the end of the subheading.

Character Style Markup Tags

- **Bold (Begin/End)** – Defines the codes that will turn the bold format attribute on and off during index generation.
- **Italic (Begin/End)** – Defines the codes that will turn the italic format attribute on and off during index generation.
- **Underline (Begin/End)** – Defines the codes that will turn the underline format attribute on and off during index generation.

Options – Index

This dialog box is for settings relating to the particular index you are working on.

Sorting

Presets – Specifies one of several preset sorting methods for your index. The available sorting methods are:

- **Letter by Letter (ISO)** – Sorts through words ignoring spaces using International Standards Organization rules.
- **Word by Word (ISO)** – Sorts each word without ignoring the spaces between them using International Standards Organization rules.
- **Letter by Letter (CMS)** – Sorts through words ignoring spaces using Chicago Manual of Style rules.
- **Word by Word (CMS)** – Sorts each word without ignoring the spaces between them using Chicago Manual of Style rules.
- **ASCII** – Sorts using standard ASCII codes (not normally used for professional indexes).

Selecting one of these presets will automatically make appropriate settings for the following four configuration items.

Ignored Characters – This is a list of all characters that will be ignored when sorting.

Full Stop Characters – This is a list of characters or sequences of characters that will be interpreted as a full stop during sorting. A full stop is equivalent to starting a new subheading. Each character or sequence of characters must be separated from the previous by an underscore character – ‘_’.

Space Characters – The characters in this list will be treated exactly the same as if they were a space.

Symbols – This is a list of all characters that are considered to be symbols. Entries starting with these characters will normally appear at the beginning of the index.

Sort Arabic numbers – If checked, SKY Index will automatically detect and sort Arabic numbers. This includes numbers that contain a fractional part. Numbers must be separated from surrounding text by a space.

Sort Roman numerals – If checked, SKY Index will examine any word that starts with a hash sign (#). If the word can be interpreted as a Roman numeral, the leading pound sign will be removed and special sort codes will be added to make the Roman numeral sort correctly. Note: If you are entering Roman numerals in the Page field, you do not need to use the hash sign.

Sort dates – If checked, SKY Index will automatically detect and sort dates. Dates in many different forms are recognized by the program. Any years that are abbreviated will take on the century during which sorting takes place, i.e. 2000-2099. Normally this is the same as the time for which data entry takes place. **Options** opens the Date Options dialog which allows you to specify how dates are handled when the year is not fully specified.

Treat as Name Index – If checked, special name sorting rules will be used when sorting your index. For example, M’Cartney, McCartney and MacCartney would all be sorted as if spelled MacCartney.

Sort Leading Symbols – If checked, entries starting with a symbol – e.g. ‘@’, ‘&’, etc – will be sorted to the top of the index and will take on sorting value.

Sort this heading by page – If checked, the (sub)heading level that you specify will be sorted by page rather than alphabetically – e.g. to produce page order subheadings in a biography. **Combine locators** will gather all locators for each (sub)heading together and only use the first locator to determine the sort order. Only one level of heading or subheading can be sorted into page order.

Index Style

Presets – Specifies the style used when generating your index. You can choose Indented or one of several Run-on styles. If none of the presets suit your needs, you can create a customised setting.

- *Indented style* will display each subheading on a line of its own.
- *Run-on style* will create a paragraph style where subheadings appear after the main heading following an initial colon. Additional subheadings are appended to the previous subheading after a semicolon.

Cross-reference placement – Lets you select the position of cross-references relative to locators

Subheading Levels – Lets you specify how many subheading levels your index will have.

Save As – If you modify the default setting of one of the presets, you can save the new style using a name you provide by clicking Save As. This new setting may be reused in future indexes.

Delete – Allows you to delete any custom index styles you may have created.

Introductory Note – Enter an introductory note for your index.

Prefix 1 – 4

You may customize your index's style by specifying a prefix for each heading level. To specify a prefix you enter the prefix text, choose the condition for which the prefix will be applied and finally, specify whether a locator or cross-reference must precede the heading for the prefix for it to be applied.

Suffix 1 – 2

SKY Index allows you to customize your index's style by specifying a suffix for each heading level. Suffixes are specified using up to two of the 7 logical conditions that SKY Index provides. To specify a suffix you, enter the suffix text and choose the condition for which the suffix will be applied and finally.

Other Options

- Double Spaced Output – If checked, the index will be generated with double spaced lines.
- Define Alphabet Sections – Allows you to specify the alphabetic sections of the index. See Defining the Alphabet Sections of Your Index below for more information.
- Include Alphabet Separators – If checked, alphabet separators will be placed at the beginning of each new heading that starts with a letter different from the previous. You can specify how the separator is displayed in the Fonts tab of the Index Options dialog box.
- Blank lines before/after – Specifies the number of blank lines that will be printed prior to or after the alphabet separator.

Heading Style

Controls the formatting, style, size and indentation of the headings and subheadings in the index document.

Paragraph Style

- Style Name – This is the style name that will be given to the current heading level when you generate an index using one of the RTF Output Formats. If your client requires specific style names, enter them here.
- Font – Specifies the font that will be applied to the current heading level.
- Font Size – Specifies the font size that will be applied to the current heading level.
- Space Before – Specifies the amount of empty space that will be added above the current heading level.
- Space After – Specifies the amount of empty space that will be added below the current heading level.
- Apply to all heading levels – Applies the current Font, Font Size, Space Before, and Space After to all heading levels. This does not affect the alphabet separator settings.

Indentation

- Indent – Specifies the amount of space that subheading 1 will be indented from the left

margin. This space will be doubled for subheading level 2 and tripled for subheading level 3 and so on. If you are configuring the alphabet separators style, this is the amount of space that alphabet separators will be indented from the left margin.

- Fixed – Specifies that each heading's indention depth will be defined independently.
- Incremental – Specifies that the indention depth will be incrementally applied to each heading level. The value shown in the Indention text box is the amount of indent for the Sub1 heading. All other indentions will be automatically calculated to create consistent indentions for all heading levels.
- More Options – Clicking this button will toggle between these two styles. The results are shown in the Preview window.
- Turnover – Specifies the amount of space, in inches that turnover lines will be indented for the currently specified heading level. This setting has a different effect depending on the two options below.
 - Fixed – Specifies that each heading's turnover depth will be defined independently.
 - Incremental – Specifies that the turnover depth will be incrementally applied to each heading level. When this option is chosen, the Turnover is determined by SKY Index and the Turnover text box is disabled.
- More Options – Toggles between two standard indention styles. The results are shown in the Preview window. The two styles are:
 - Turnover lines are indented by the indention amount of the current heading, plus one half of the indent of the first subheading.
 - Turnover lines are indented by the indention amount of the next heading, plus one half of the indent of the first subheading.

Character Formatting

- Bold/Italic/Underline/Small caps/Strikeout – If checked, the current heading will be printed in boldface, italics, underline, small caps and/or strikeout format.

Capitalization

See also the Data Entry options for AutoCapitalisation

- None – If checked, no modifications will be made to the capitalization of the text for the current heading level.
- Initial Cap – If checked the first letter of the first word of the current heading level will be capitalized regardless of how it appears in the data entry grid. Note: If you enable this feature, you can override its effect by typing a colon as the very first character of a heading. The colon will not print and the first letter of the heading will not be capitalized.
- Upper case – If checked, the selected heading level will be generated in all capital letters.
- Lower case – If checked, the selected heading level will be generated in all lower case letters.
- Title case – If checked, the selected heading level will be generated in title case.
- Don't apply to ignored words – If checked, any words that are in the ignored words list will not be modified by the Initial Cap or Title Case options listed above.

Other

- Alternative Fonts – Allows you to define additional fonts that can be used in your index.

- Merge Orphans – Instructs SKY Index to automatically merge orphan subheadings.

Locators

The Locators tab of the Index Options dialog box lets you define how locators (page numbers) are printed when you generate an index. It also defines the characters that delimit volume and chapter labels during data entry.

- Leader – Specifies the character(s) that will precede the first page number after a heading has been printed.
- Separator – Specifies the character(s) that will separate locators after the initial locator has been printed.
- Prefix – Specifies any characters to appear directly before each locator as a prefix.
- Suffix – Specifies the characters to appear directly after each locator as a suffix.
- Ignore Duplicates – If checked, duplicate records in your index will be ignored. Otherwise, SKY Index will put the number of occurrences (if greater than one) in parentheses directly after the page number – e.g. ‘67(2)’ means two entries on page 67. This is most useful in genealogical indexes.
- Right Align – If checked, page numbers will be right aligned in your printed index. A dotted leader will precede the page numbers if space permits.
- Separators take on leading locator style – If checked, the locator separator will appear in the generated index in the same style as the locator before it. For example, if the previous locator is in italics, the separator will be in italics.

Page Ranges

- Conflation – Specifies how page ranges will be handled. Your options are None, Hart’s Rules, Hart’s (modified), Chicago 15th Ed., Chicago 14th Ed., and Custom. The options have the following effects:
 - Simple – Page ranges will not be abbreviated.
 - Hart’s Rules – Page ranges will be abbreviated by removing all but the changed portion of the last page in the page range. For example, 1911–1914 would be changed to 1911–4.
 - Hart’s (modified) – Identical to Hart’s Rules; however, if the last two digits of the first number is in the teens, the second number will include the leading 1 even if it would not otherwise. Example: 1911–4 becomes 1911–14.
 - Chicago 15th/14th Ed. – Page ranges will be abbreviated using the rules set forth by the University of Chicago Press 15th or 14th Editions.
 - Custom – Displays the Page Range Conflation Rules dialog where you can specify custom settings for clients with non-standard requirements.
- Separator – Specifies the character that will be used between a range of pages. Your options are a hyphen, an en dash or the word *to* surrounded by spaces. Most indexes use an en dash. This setting only affects indexes generated using one of the RTF output formats. For all other output formats, use the Markup Tags ‘Page Range Separator’ setting in the Document Options dialog.
- Combine 1, 2, 3 = 1–3 – If checked, SKY Index will automatically create a page range when two or more consecutive pages are encountered. For example: 1, 4, 5, 6, 9 will be changed to 1, 4–6, 9.

- Consume locs in range – If checked, if the locator before or after a page range is part of that page range, it will be consumed by the range and not be displayed separately. For example, the locators 5-10, 8, 11 would appear as 5-10, 11.
- Format Priority – Displays the Locator Format Priority dialog which allows you to specify the priority given to format attributes that have been applied to locators.

Sections (Volumes and Chapters)

Sections allow you to specify a part of a locator that has higher sorting priority than the page number itself and that identifies a different part of the locator. For instance, a volume or chapter label would be considered a section and would be sorted with a higher priority than the page number. SKY Index will allow you to specify up to 9 sections. SKY Index also refers to these sections as section labels. Sections at level 1 are referred to as ‘volumes’ and sections at level 2 are referred to as ‘chapters’. The ‘Recognise volume numbers’ option must be on for the increment and decrement shortcut keys to work properly.

Defining the part of the locator that is a section (volume or chapter)

This is done with an Input Delimiter – a single character that is not used for any purpose other than to define a break between a section label and a page number.

Defining the data type of the section

After you have defined your section input delimiters, you may need to define the data type for the section. By default, the data type is set to ‘Mixed’ and this will be adequate for the vast majority of section labels. Other options include Arabic or Roman numerals and various kinds of date formats.

Applying Character Formatting or Capitalization to a Section

Although you can apply formatting to a section label during data entry just as you can for index headings, there may be times when you want all section labels to be bold or italicized. You can select common character formats and specific capitalization here labels.

Section Options

- Input Delimiter – Specifies the character that will be recognized as a volume label separator during data entry. By default this character is a colon (:). Any characters to left of this character are considered to be a volume label and are sorted as such.
- Output Delimiter – Specifies the character to use as a volume separator when the index is generated. By default this character is a colon (:).
- New Section Separator – Specifies the characters that will be used when a new section label is encountered when printing the locators. It can be used to make the change from one section to another more obvious.
- Prefix/Suffix – Specifies text to be added to the front or end of every section.
- Data Type – Specifies what kind of data the section label consists of. Your options are:
 - Mixed
 - Arabic Number
 - Alpha
 - Roman numeral

- Day/Month/Year
- Formatting – Allows you to specify a character style and capitalization to all section labels. Options are:
 - Character Style – Bold, Italic, Underline, Strikeout, and Small Caps
 - Capitalization – None, Initial Cap, Lower Case, Upper Case, and Title Case
 - Enabled – Allows you to enable or disable specific section labels. If you disable a section the text will either be treated as part of a different section that is enabled or as prefix text for the page number.
 - Hide Repeated – If checked, when a list of locators for a single heading contains several with the same section label, the section label will only be printed for the first locator in that list. For example II:5, II:7-9, II:24, II:55 would be abbreviated to: II:5, 7-9, 24, 55.
 - Only in page ranges – If checked, and if Hide Repeated is also checked, the repeated section labels will only be hidden in a page range. For example II:5, II:7-9, II:24, II:55 would be abbreviated to: II:5, II:7-9, II:24, II:55.

Cross-references

Presets

- See/See also – Choose the format that you desire for *see* or *see also* cross-references from the drop-down list. If the exact format you need is not displayed, choose the one that is closest and perform any additional configuration manually.

Format and Placement

- Format – Specifies how the “see” and “see also” in cross-references will be formatted. You can choose Italic, Underline, Bold, or None.
- Placement – Specifies where cross-references will be placed. Your options are:
 - Before Locators – cross-references will appear with the heading but before any locators
 - After Locators – cross-references will appear with the heading but after any locators
 - First Subheading – cross-references will appear at the top of the subheading list.
 - Last Subheading – cross-references will appear at the bottom of the subheading list.
- Text – During data entry, SKY Index requires that “see” cross-references start with the words ‘see’ or ‘see also’ in order for the program to identify them as cross-references. If your publisher requires a different word, or if the index is in a language other than English, you can enter the words to be used when the index is generated in these textboxes. You will still use ‘see’ or ‘see also’ when entering your cross-references, but when the index is generated, the text you provide here will be used instead.
- Prefix/Suffix – Specifies text to appear directly before or after the words ‘See’ or ‘See also’ when generating the index.
- Small Caps – If checked, the words ‘see’ or ‘see also’ will be given small caps character style.
- Merge To – Specifies where orphan cross-references will be placed. Your options are:
 - Don’t – Orphan cross-references will not be merged.

- Before Locators – Orphan cross-references will be merged with the parent heading and will be placed before any locators.
- After Locators – Orphan cross-references will be merged with the parent heading and will be placed after any locators
- Prefix/Suffix – Any text that you wish to appear before or after the cross-reference.

Online resources

The SKY Index website is at www.sky-software.com. The demo version of the program can be downloaded from here. A support forum is being set up for users.

The SKY Index mailing list is a Yahoo Group. You can join or review postings at tech.groups.yahoo.com/group/SKYIndexUsers.

My email: jonjerme@gmail.com

UNDERSTANDING AND INDEXING CHINESE, JAPANESE AND KOREAN (CJK) NAMES

Nelly BESS (Japanese names)

LAM Lai Heung (Chinese and Korean names)

INTRODUCTION

Personal names can sometimes cause difficulties for indexers. When the names have been transliterated, or Romanised, from other languages into English, inconsistencies can arise. This paper focuses on issues arising from the indexing of personal names of Chinese, Japanese and Korean origin. Referred to as the CJK languages in the library and software/communications world, these languages share certain similarities for historical reasons: their writing systems use, to a greater or lesser extent, ideographs known as *hanzi* in Chinese, *kanji* in Japanese, and *hanja* in Korean. Traditional name order is surname first and given name last, with no middle name convention as in the West. Transliterated names in these languages also share the issue of confusion resulting from variant methods of Romanisation, inconsistent use of Romanisation schemes, varying personal preferences, and name order changes depending on time period and location.

The three sections of this paper will focus on name indexing in each of the CJK languages, highlighting the main issues and conventions, as well as their exceptions. As regional differences play an important part in how Chinese names are Romanised, the Chinese section is further divided into regional subsections. For the same reason, the Korean section is also divided into South and North Korea.

No discussion of the individual languages is included as there are many resources providing this information. The assumption is that indexers are facing an English-language text, with names written in the Roman alphabet. All the surnames in this paper are capitalised for clarity.

CHINESE NAMES

A majority of Chinese have a monosyllabic one-character surname followed by a disyllabic two-character given name. When Romanised, Chinese surnames always form a separate unit while given names can be in two parts, linked together either with or without a hyphen. Names like MAO Zedong (China), LI Ka Shing (Hong Kong) or MA Ying-jeou (Taiwan) are typical three-syllable names. All three formats are the same in Chinese but are Romanised according to different conventions.

Some Chinese also have two-character compound surnames such as SIMA Xiangru (China) or SZETO Wah (Hong Kong); and one character given names such as MO Yan (China) or Ang LEE (Taiwan). It is also common for Chinese in Hong Kong, Singapore, Malaysia, and those living overseas to adopt Western names in addition to their birth names. Donald TSANG Yam Kuen (Hong Kong), Tracey HUANG (Singapore) and Adeline YEN MA (American Chinese) are some of the many examples.

Traditionally, Chinese has a generation naming convention. Members of the same generation, either siblings or cousins, share a particular character as part of their given names, known as a generation name. The three SOONG sisters who made significant impacts on early 20th century Chinese history are one well-known example: SOONG Ai-ling (wife of banker H. H. KUNG), SOONG Ching-ling, also SONG

Qingling (married to SUN Yat-sen) and SOONG May-ling (Madam CHIANG Kai Shek) all share the character *Ling* as their generation name. Historically, Korea also followed this custom, but generation names are now less common in both China and Korea.

It was also an ancient tradition for Chinese to have additional given names, or courtesy names. Courtesy names can be both *Zi* names or *Hao* names. *Zi* names were assigned to boys when they reached the age of twenty as a sign of adulthood, and to girls upon marriage. *Hao* names on the other hand, were self-assigned and function like pseudonyms. It is possible for someone to have more than one *Hao* name. Until recently, almost all Chinese painters, calligraphers and scholars had courtesy names. The revolutionary figure SUN Yat-sen is best known in the West by his school name. School names were usually assigned by teachers when children reached school age. However, SUN had a handful of other names too, including milk names (birth name before a proper name) and other courtesy names. Interestingly, he is known to most Chinese by his Japanese name SUN Zhongshan.

China has seven major dialect groups and hundreds of sub-dialects that are mutually unintelligible. Although Chinese names are the same when written, either in traditional or simplified Chinese script, they can be Romanised differently depending on dialects, conventions used, geographical location, or simply personal preferences. The following sections provide an overview of how Chinese people in each geographical region Romanise their names.

CHINA

Form of Chinese spoken:	Mandarin/ <i>Putonghua</i> (based on Beijing dialect)
Romanisation system for names:	<i>Hanyu Pinyin</i>
Typical name formats:	MAO Zedong (politician) SIMA Xiangru (Han Dynasty poet) OUYANG Xiu (Song Dynasty scholar/historian) Mo Yan (author)

Regardless of the number of characters in family or given names, Romanised mainland Chinese name formats are always in two parts – a one-part surname followed by a one-part given name as in Hu Jintao or Xi Jinping. Another characteristic of mainland Chinese names is that the original order is always kept – surname first, followed by given name.

Unlike the practice in Hong Kong where married women sometimes add their husbands' surnames in front of their maiden names, mainland Chinese women do not alter their names after marriage. Children usually inherit their father's family name but there are cases where they adopt the mother's name, a custom known as *ruzhu*.

Some Chinese names have apostrophes as in Liu Jian'ou – the apostrophe in between serves to indicate syllable break for disambiguation. The diacritic mark umlaut, although sometimes ignored, is important as in Lǔ Shuxiang. Lu and Lǔ are two different surnames so the presence and absence of this mark will affect sorting order. In addition, Chinese is a tonal language and diacritic marks are sometimes used to indicate tone levels as in MÁO Zédōng.

In terms of Romanisation, *Hanyu Pinyin*, or Pinyin for short, is the only system currently in use in China. Adopted internationally in 1979, Pinyin has been in use in China since 1958 and has now replaced Wade-Giles as the universal standard. Because of its widespread and consistent use, names

of mainland Chinese are easy for indexers to work with. Despite some people reversing their name order when moving overseas, Pinyin names are almost always predictable and seldom cause problems in indexing.

HONG KONG

Form of Chinese spoken:	Cantonese
Common Romanisation system for names:	Hong Kong Government Cantonese Romanisation
Typical name formats:	Li Ka Shing (Businessman) Donald TSANG Yam Kuen (politician) Carrie LAM CHENG Yuet Ngor (female politician) Jackie CHAN (movie star)

Typical Hong Kong names consist of three parts – a one-part surname and a two-part given name as in Li Ka Shing. However, it is common for people to reverse their name order when writing in English. It is also widespread practice for people in Hong Kong to adopt Western names in addition to traditional birth names. Another unique feature of Hong Kong names is the surname-in-middle format. A typical example is the former Chief Executive Officer Donald TSANG Yam Kuen, where TSANG is the family name. Many people also shorten their names in the presence of Western names as in the case of Donald TSANG.

Interestingly, the Hong Kong news media, as well as *Wikipedia*, retain the old Wade-Giles standard for Hong Kong names, with hyphenation between two-syllable given names. Li Ka-shing and Donald TSANG Yam-kuen are the standard forms in Hong Kong English newspapers. However, this format is rarely seen outside the English media in Hong Kong. In addition, it is common for female Hong Kong politicians and those in the upper class to add their husband's name before their maiden names upon marriage. An example is politician Carrie LAM CHENG Yuet Ngor in which CHENG is the maiden name and LAM is her husband's family name.

TAIWAN

Form of Chinese spoken:	Mandarin
Common Romanisation system for names:	Wade-Giles (<i>Hanyu Pinyin</i> official since 2009)
Typical name formats:	MA Ying-jeou (politician) Stan SHIH (businessman) Ang LEE (film director) Annette LÜ Hsiu-lien (female politician)

Although Wade-Giles was the Romanisation standard for the Chinese language throughout the world for most of the 20th century, the system has become obsolete nowadays except in Taiwan.

Taiwanese names are characterised by the standard Wade-Giles format of a one-part surname, followed by a hyphenated two-syllable given name, as in Koo Chen-fu or Soong May-ling. Although rarely used, full Wade-Giles name format also employs diacritic marks and numeric tone marks as in Ssu¹-ma³ Ch'ien¹. However, since the Taiwanese government does not impose strict rules on personal naming convention as is the case in China, variations are common.

Many Taiwanese also reverse their name order when writing in English or when overseas, so name order can sometimes be confusing. Hyphenation between two-syllable given names can be a good

clue but indexers may need to exercise caution when working with one-syllable given names as in the case of Taiwanese-born American film director Ang LEE. Since both ANG and LEE can be family names, extra research may sometimes be needed to confirm name order.

Although Wade-Giles remains the most popular naming convention in Taiwan, *Hanyu Pinyin* was adopted as the official Romanisation system by the Taiwanese government in 2009. There is sure to be a slow shift towards Taiwanese Pinyin names in the foreseeable future.

SINGAPORE/MALAYSIA

Forms of Chinese spoken:	Mandarin, Cantonese, Fujian, Kejia and other Chinese dialects
Common Romanisation system for names:	Mixed: based on dialects or personal preferences
Typical name formats:	LEE Kuan Yew (Singaporean politician) GOH Chok Tong (Singaporean politician) Margaret LIEN (Malaysian banker) Robert KUOK Hock Nien (Malaysian businessman)

Although still rare, *Pinyin* names based on Mandarin are slowly becoming more common in Singapore and Malaysia. Instead, the Chinese dialects of Fujian (Hokkien), Guangzhou (Cantonese), Kejia (Hakka), and Chaozhou (Teochew) have more important presence in these regions. Since neither country imposes strict rules on personal naming convention, names are often Romanised according to dialectal pronunciation and personal preferences. Like Hong Kong names, typical Singaporean and Malaysian Romanised names are in three parts, as in GOH Chok Tong or LEE Kuan Yew. Dialectal pronunciation has also resulted in the same surname appearing in many different forms: the surname CHEN in *Pinyin* can also be Romanised as CHAN, CHIN, DING, TAN or TANG.

Name “Englishisation” is a trend in Singapore and Malaysia and it is common for people to adopt Western names.¹ Just as with Hong Kong names, Singaporean and Malaysian name order can be unpredictable if in the presence of a Western name. This is because the surname can be embedded in the middle as in the name of Gerald GIAM Yean Song. However, three-part names are almost always in the original surname-first order as in the name of Singapore Prime Minister LEE Hsien Long or badminton player LEE Chong Wei. Nevertheless, indexers should take extra care with name order when working with these names.

OVERSEAS CHINESE

Forms of spoken Chinese:	Mandarin, Cantonese, Fujian, Kejia and other Chinese dialects
Romanisation systems for names:	Mixed: based on dialects or personal preferences
Examples:	I. M. PEI (Chinese American architect) Yuan T. LEE (Taiwanese American chemist) CHOIE Sew Hoy a.k.a Charles SEW HOY (Chinese New Zealander) Yo-Yo MA (Chinese American cellist) OEI Wie Gwan (Indonesian businessman) Adeline YEN MAH (female Chinese American author)

The majority of overseas Chinese diasporic communities are from Southern China where Guangzhou (Cantonese), Keijia (Hakka) and the Fujian (Hokkien) dialects are spoken. This has resulted in many overseas Chinese names having unusual spellings due to uncommon dialectal pronunciations. Other names look strange because people flouted common conventions and came up with their own idiosyncratic spellings. Many overseas Chinese during the gold mining era of the 19th and 20th centuries also had their names reversed as in the case of CHOIE Sew Hoy, also known as Charles SEW HOY; or anglicised, as in the family names SHAW (from SHAO or SIU) or LOUIE (from LO or LAW). In countries such as Thailand, Indonesia and the Philippines, many Chinese were also obliged, or forced to change their names to make them sound less Chinese, often due to anti-Chinese policies.

Many married women who moved overseas also adopt the convention of adding their husband's names before their own as in the case of Adeline YEN MAH, where YEN is the maiden name and MAH her husband's.

JAPANESE NAMES

DISTINGUISHING FEATURES

Japanese language formation provides clues to identifying a name as Japanese. The language is mainly polysyllabic and one-syllable names are rare. Typically, surnames consist of three or four syllables, as in SUZUKI, MATSUMOTO, and IZUI. However, there are no rules governing length.

As most Japanese syllables end with a vowel – the rest end with *n* – typical given names might be Keiko, Narumi and Jiroemon. Transliterated Japanese names do not contain the letters l, q, v and x; nor do they contain hyphens.

Names are confined to surname plus given name. The exceptions are one-word names, such as those used by professionals like musician KITARŌ; historical names that show clan lineage, such as FUJIWARA no Yasunori (Yasunori of the Fujiwara clan), or art lineage, such as Sen no Rikyū (Rikyū of the Sen tea school); and names that include a title, as in Shunryū SUZUKI Rōshi, the latter name indicating 'teacher'. Any Japanese names featuring middle names are atypical, and will usually be found only in the names of people of mixed Japanese and foreign parentage, such as George Ryoichi ARIYOSHI (former Hawaiian governor). Some Japanese living overseas will take on Western given names, or shorten their own names, i.e., Yukiko to Yuki, but these are alternatives only.²

Japanese given names often contain distinguishing masculine or feminine elements. The given name Keiko features the suffix *ko*, still a common suffix in Japanese female names, *ko* translating as 'child'. The prefix *Jiro* in Jiroemon is a common element in male names, translating as 'second son'. Lists of these feminine/masculine elements can be found on various Internet sites.^{3 4}

Naturally, exceptions occur, especially in contemporary names in which personal preferences can override tradition. Such is the case with contemporary Japanese singer MOMOI Haruko who calls herself Halko MOMO-I. However, the Internet is a good place to check on current popular figures; a search on *Wikipedia* for Halko MOMO-I will bring up: Haruko MOMOI (桃井 はるこ MOMOI Haruko).⁵

NAME ORDER

Japanese order

Traditional Japanese name order predominates in scholarly publications in the humanities and social sciences.⁶ Japanese name order is also always used for historical figures from before the Meiji period (1868–1912), when Japan was opened up to the West. This is a way of ensuring that historical names remain consistent. The *Wikipedia* style manual for Japan-related articles stipulates that for people born before the Meiji period contributors should use the traditional Japanese order and add the name in Japanese script.⁷ Thus, the historical figure KUSUNOKI Masashige appears as: KUSUNOKI Masashige (楠木 正成), with a note that the family name is KUSUNOKI.

While second mentions in a text can often confirm name order, with the author going on to write more about people by referring to them by surname, this is not the case for pre-Meiji historical persons. Many of these figures are referred to by their given names on second mention. As a typical example, in *The nobility of failure* the author introduces the tragic Japanese hero KUSUNOKI Masashige, and on second mention, refers to him as Masashige.⁸ Indexers should note this practice to ensure they do not incorrectly invert the name. The practice is not followed in the modern period (after 1868). Therefore, a second mention for TŌJŌ Hideki (prime minister during most of World War II) refers to him as TŌJŌ. For figures who bridge the eras, the author will have made a choice one way or the other.

Using the given name on subsequent mentions applies also to historical personages with pen names or art names. Taking an art name was common in pre-twentieth-century Japan, and people became known by these names.⁹ Thus, the late-Meiji writer NATSUME Sōseki is referred to on second mention as Sōseki, though his family name is NATSUME.

Indexes in works that contain such historical figures usually contain a direct entry for the name – NATSUME Sōseki – and a cross-reference to the direct entry – Sōseki, see NATSUME Sōseki.

Western order

The practice of using Western order for Japanese names began in the Meiji period, and most commonly occurs when Japanese are using Western languages or are in a Western context. Even today Japanese school children learn to reverse their names when writing and speaking English.¹⁰ Thus, in non-historical documents, in conference papers, and in such areas as business, advertising, science and technology, Western name order tends to predominate. Western order also prevails in the English-language news media inside and outside Japan. Both the *Japan Times* and the *Wall Street Journal* refer to the current prime minister as Shinzō ABE.

For modern figures (Meiji and post-Meiji), the *Wikipedia* style manual encourages contributors to use Western order. For example, Prime Minister ABE, appears as follows: Shinzō ABE (安倍 晋三 ABE Shinzō), with the accompanying note “In this Japanese name, the family name is ‘Abe’”.

NAME ORDER TRENDS

While the Meiji leaders were willing to accommodate Western ways such as differing name order, a trend to return to Japanese customary name order is emerging. This move is recommended by translators of Japanese works, and also has political backing.¹¹ In December 2000 the Council on National Language at the Education Ministry's Cultural Affairs Agency recommended that English

language productions begin using the Japanese naming order because "it is in general desirable that personal names be presented and written in a way that preserves their unique forms, except for registries and other documents with specific standards." ¹²

One example of changing usage is the English-language quarterly *Japan Echo*, published in Japan. In the mid-1970s the publication's editorial note read 'All the Japanese names in *Japan Echo* follow the Western practice of placing the given name first'. By the late 1980s the note had changed to 'All the Japanese names in *Japan Echo* follow the Japanese practice of placing the surname first'. It remains to be seen whether the recommendation catches on.

VARIATIONS IN ROMANISATION

Japanese names are transliterated into the Roman alphabet according to one of three schemes. The most common is the modified Hepburn, named after American missionary James C. Hepburn who used English consonants and Italian and German vowels to represent Japanese pronunciation. This system comes closest to accurate pronunciation of Japanese for the general English reader, is used on *Wikipedia* and in most Japanese-English dictionaries, and is the standard used by the American Library Association – Library of Congress.

Romanisation schemes may seem unimportant as indexers need only adhere to the name forms used by the author. However, it is helpful to know about other Romanisation systems as they account for spelling variations that may confuse. The second scheme, the Kunrei or 'official' system, was adopted by the Japanese government in 1937, is taught in Japanese schools today, and is still used by Japan's national library, the National Diet Library. The third scheme is the Nippon System, used mainly in the pre-war period, and evident still in some proper names. An example of different Romanisation appears below.

Romanisation variations	
<i>Modified Hepburn</i>	<i>Variant styles</i>
INOUE	INOUE
ŌMAE	ÔMAE, OHMAE
SHIZUE	SHIDZUE
DAISETSU	DAISETZ
SHUNRYŪ	SYUNRYŪ
KANSAI	KWANSAI

Wikipedia provides a good overview of Japan's Romanisation systems. ¹³

The Romanisation of double or elongated vowels also varies. It is important to replicate the representations as they appear in the text, for two reasons. First, while elongated vowels do not impact on sorting in an index – ŌMAE, ÔMAE, and OHMAE will sort close enough for a reader to find them – they affect pronunciation and make the Romanised original clearer to people with knowledge of Japanese. In a language that features many homonyms, indicating vowel elongation is important; after all, if a publisher has made the effort to use macrons or other diacritics, their use must be deemed helpful to the audience. To illustrate, omitting the macron from the surname Ōmae, results in the word *omae* which can have a number of meanings, including 'Hey you' or 'dearest'. In the main, scholarly presses will use macrons and the English-language news media will not.

Second, personal preferences should be respected. It is well known in Japanese and business circles, for example, that the writer and business strategist Kenichi OHMAE prefers to Romanise his name as shown, whereas the modified Hepburn version would be Ken'ichi ŌMAE. (*Wikipedia* displays his name as Kenichi OHMAE (大前 研一 ŌMAE Ken'ichi). If a text features a transliteration that varies from common usage, such as ŌMAE instead of OHMAE or vice versa, the indexer might consider alerting the author.

A WORD ON APOSTROPHES

Japanese name Romanisation can also feature the apostrophe, mainly in texts aimed at specialists, or when precise word distinctions are important. An apostrophe clarifies meaning and distinguishes the division of syllables. For example, in the given name Jun'ichiro the apostrophe indicates that the name divides as Jun-ichi-ro and not Ju-nichi-ro. An apostrophe can also distinguish homonyms, such as chin'atsu (oppression) and Chinatsu (a girl's name). Indexers, of course, will adhere to the style used in the text, and leaving out an apostrophe will never constitute an actual error.

KOREAN NAMES

There are only about 250 surnames in Korea and almost all are of Chinese origin. The five most common Korean surnames in South Korea are KIM, YI, PAK, CHOE and CHONG, which account for 54 per cent of the population.¹⁴ Like Chinese names, most Korean names are in the same format of a one-character monosyllabic surname followed by a disyllabic two-character given name. Names like LEE Byung-hoon and KIM Jong Un are typical three-syllable name examples. Similar to Chinese tradition, a small number of Koreans also have two-character compound surnames or a one character given name, as in the football player NAMGUNG Do. Koreans also share the Chinese custom of having generation names although this has become much less common nowadays. Korean women also keep their maiden names after marriage.

SOUTH KOREA

Language spoken:	Korean
Romanisation systems for names:	Revised Romanisation (RR) McCune-Reischauer Romanisation (MR) Other hybrid systems
Typical name formats:	CHUNG Ju-yung (businessman) Ko Un (poet) KIM Hongdo (18 th century painter) LEE Hun Jai (politician) NAMGUN Do (football player)

Since 2000, the South Korea government has replaced the old McCune-Reischauer (MR) to the new Revised Romanisation (RR) system. When it comes to naming convention however, people are free to use whatever system they prefer and very few stick to one particular convention. A look at the Members section of the National Assembly of the Republic of Korea website illustrates the situation in South Korea.¹⁵ Despite being official, the site displays various combinations of name order and formats, including the use or absence of hyphenation, spacing, capitalisation and commas. According to Wikipedia, Hyundai founder CHUNG Ju-yung is also known as JEONG Ju-yeong (RR) or CHŎNG Chuyŏng (MR), making it puzzling for non-Koreans to identify persons.

A basic understanding of the two main Romanisation systems in use in South Korea may help to explain some of the issues indexers face with Korean names. Although people tend to either omit or ignore them, the MR system uses apostrophes as aspiration marks (puff of air accompanying words with consonants such as k, p or t), as well as diacritic marks. RR on the other hand, although similar to MR, uses neither of these marks which has helped it gain wide acceptance on the Internet. In terms of hyphenation, MR does not use any but the Library of Congress policy dictates that all Korean two-syllable given names be hyphenated. The same practice is adopted by the South Korean English media as well as *Wikipedia*. The use of hyphens in names is optional in RR, rendering the use of hyphenation a matter of personal preference.

Indexers need to be aware that the Library of Congress, along with many libraries in the world, did not adopt the official RR system even though it has been in effect for more than a decade. Furthermore, Korean academic communities, both domestic and overseas, have also been resistant to the change, criticising it as inaccurate in terms of pronunciation. Even though the situation is slowly changing, many Korean language text books and English publications still continue to use the old MR system. As a result, the same Korean name comes in many different formats and spellings and can be a challenge for indexers to work with. One example is the surname LEE, which can also be Romanised as Yi, I, Li or RHEE.

It is also common for South Koreans to reverse their name order when writing in English or when in an international context. Hyphenated given names can sometimes indicate name order but many Korean names are also in three parts with no hyphenation, making it difficult to identify family names. One-syllable given names also pose challenges for indexers, as in the case of KO Un where KO and UN can both be family names. Thus, Korean names require extra research work because of these inconsistencies in Romanisation.

NORTH KOREA

Language spoken:	Korean
Romanisation system for names:	Slight variation of McCune-Reischauer Romanisation
Common name formats:	KIM Jong Il KIM Jong Un

Compared to their South Korean counterparts, North Korean names are relatively rare in publications. North Korea continues to use a slight variation of the McCune-Reischauer system, with diacritic marks for vowels (often ignored or omitted), but without apostrophes. Typical North Korean names are in three parts, with no hyphenation. The official name of the current political leader is KIM Jong Un. However, due to influences from South Korean practices, his name is also spelled as KIM Jong-eun or KIM Jung-eun in South Korea as well as Western media.

CONCLUSION

A number of general guidelines apply to the indexing of all CJK names.

1. When traditional name order is used in the main text, names are indexed as is, surname first, with no comma between the family name and the given name, e.g., MAO Zedong (China). This practice is debated by some, who prefer to add a comma to all “inverted” names. However, while ‘MAO, Zedong’ may seem logical and correct by indexing standards, it looks

incorrect to those who know the language and it also contravenes Chinese naming convention. When Western order is used in the text, the name is inverted and a comma added, as in LEE, Ang (Taiwanese-born American).

2. Diacritics and apostrophes should be retained if an author has used them, especially if the target audience is knowledgeable in the particular language.

Although not directly related to indexing, it is worth noting that publishers will often use Western name order on a book's title page, jacket, spine, and in copyright information, even though traditional name order has been used throughout the text. This practice is used so that library personnel unfamiliar with the language invert the name correctly. Thus, a book cover showing the Japanese author name Kōbō ABE will be correctly entered as ABE, Kōbō. To have inverted a name like this incorrectly, i.e., as KōBō, Abe, would effectively hide the work.

When a CJK name falls outside general rule and conventions, indexers need to access readily available resources that either feature the name already constructed, or supply names that can help them put the name in indexable order. For contemporary names, and names of people unlikely to have written works or been the subject of written works, the Internet can provide good results. Indexers can also consult websites that list common surnames and given names in a particular language to confirm name order.

For historical figures and people with a publishing footprint, library authority files provide a consistent and reliable resource. The Virtual International Authority File (VIAF), which is hosted by the Online Computer Library Center (OCLC) and is freely accessible, makes available the authority files of trans-national library agencies from 16 countries, including all major national libraries. As well, the files supply additional information on alternative names and describe the history of a person's global name usage. When searching on VIAF, either traditional CJK order or Western order will bring up the record.

If an indexer reaches an impasse, they might consider contacting the author, publisher, or people who work with a particular language, such as translators or librarians. For Japanese, for example, the Society of Writers, Editors and Translators can be contacted via their website. The authors also welcome any queries or comments at lainching@gmail.com (Lai Heung LAM), and rbess@paradise.net.nz (Nelly BESS).

Notes:

¹ Tan, Peter K. W. 2001. Englishised names? Naming patterns amongst ethnic-Chinese Singaporeans. *English Today* 17: 45-53. <http://courses.nus.edu.sg/course/elltankw/names.pdf>. (Accessed February 8, 2013).

² Power, John. Japanese names. *The Indexer* 26 (2) (2008): C4:2-6. http://www.theindexer.org/files/26-2/26-2-cp4_002.pdf. (Accessed February 16, 2013)

³ "Male Japanese names." 20,000+ Names from around the world! http://www.20000-names.com/male_japanese_names.htm (Accessed February 17, 2013).

⁴ "Female Japanese names." 20,000+ Names from around the world! http://www.20000-names.com/female_japanese_names.htm (Accessed February 17, 2013).

⁵ "Haruko Momoi." *Wikipedia*. http://en.wikipedia.org/wiki/Haruko_Momoi. (Accessed February 16, 2013).

⁶ Society of Writers, Editors and Translators. 1998. *Japan Style Sheet*. Revised ed. Berkeley: Stone Bridge Press.

⁷ "Manual of style." *Wikipedia*. http://en.wikipedia.org/wiki/Wikipedia:Manual_of_Style/Japan-related_articles. (Accessed February 16, 2013).

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- ⁸ Morris, Ivan. 1980. *The nobility of failure*. Penguin Books: Middlesex.
- ⁹ Society of Writers, Editors and Translators. 1998. *Japan Style Sheet*. Revised ed. Berkeley: Stone Bridge Press.
- ¹⁰ Ibid.
- ¹¹ Ibid.
- ¹² Panel seeks reverse order for Romanized Japanese names." Japan Weekly Monitor, June 12, 2000.
<http://www.thefreelibrary.com/Panel+seeks+reverse+order+for+romanized+Japanese+names%2B.-a062709021>.
(Accessed January 12, 2013).
- ¹³ "Romanization of Japanese." *Wikipedia*. http://en.wikipedia.org/wiki/Romanization_of_Japanese. (Accessed February 16, 2013)
- ¹⁴ Paik, Sungjong. 2000. The formation of the united lineage in Korea. *The History of the Family: An International Quarterly* 5 (1): 75-89.
- ¹⁵ "Members." *The National Assembly of the Republic of Korea*. http://korea.na.go.kr/mem/mem_01.jsp#. (Accessed January 18, 2013).

CINDEX™ Workshop – Patterns for the Plucky: Thursday 14th March, 2013 ANZSI Conference, Wellington, NZ

The fundamentals of FIND and REPLACE options and operations are described below. Coupled with pattern matching they become even more powerful.

Case sensitivity

- Any search for a string of characters is case-insensitive unless you request otherwise. (The opposite is true for REPLACE). Thus searching for the character string “cat” might find *Catacomb*, *cat*, *Cats*, *communication*, *classification*, *Indicator*, etc.
- Checking the “Case” box (bottom of FIND screen) and still searching for “cat” will only retrieve *cats*, *communication*, *classification*, *Indicator*
- Checking “Whole Word” instead of “Case” will retrieve only *cat*
- Should you wish to find both plural and singular forms (but avoid using a pattern), you can enter “cat” in the text box and select the Boolean operator OR from the drop-down menu to the right of the text box. A second text box will appear. Enter “Cats” in this second box. Check “Whole Word” beneath both text requests and the search will now retrieve *cat* and *Cats*.

Excluding characters from the search

- You can also use the Boolean operator NOT to exclude a specific character or characters from the search. For example, you may have entered author names and subject content in the same index file, and now wish to quickly spell-check only the subject material.
 - If the author names were entered in “last name and initial letter” format, then exclude the period (.) from the search. To do this simply type a period in the text box and check the NOT box immediately to the left. The search will retrieve all records that do not contain a full stop. Now run the spell-check. The search will also identify name entries where you failed to provide a period – another editing check satisfied!

Including/Excluding records from the search

- The FIND screen has two areas that allow you to restrict your search as you wish: *Scope* allows you to define how much of the index you wish to search; and *Only Among* which lets you determine the “types” of records among which you wish to search
- Within *Scope* the default setting is to search the whole index (or whatever is currently displayed, such as a group), but you can also search:
 - within a highlighted array of records by checking the *Selected Records* button
 - among a range of records (j-s, for example) or by record number, (200-500, for example). In the first instance you need to display the index in an alphabetic sort; in the latter you would need to place the index in *Unsorted* order (i.e. the order in which they were entered). To do this, go to the View Menu and uncheck the *Sorted* option. When finished, recheck the *Sorted* option
 - by date of the last action (adding or editing) in records.
 - by *User ID*. This is particularly useful in a team-indexing project. To ensure that each record is “stamped” with the User ID, it should be set, prior to beginning work, on the *Preferences/General* screen. (in Windows editions of the program Preferences are found on the Edit Menu; under the Cindex Menu on the Mac).

- The *Only Among* section of the FIND and REPLACE screens provides ways to restrict searches (and replacements) to certain kinds of records. For example, to search among (or simply locate and group) all *New* records ensure that the following two buttons are checked: *Records That Are* and *New*. Cindex defines a new record as one that has been added to the index since the file was last opened. A *Modified* record is one that has been either altered or edited, or newly added since the file was last opened. Records that have been *Deleted* can also be found, but only when records are displayed in Draft view (VIEW Menu/Draft Format). *Labeled* records can also be located, either by individual label color or all at once.

Marked and *Generated* records are the result of other operations in CINDEX and are not discussed here.

Searching by Type Style or Font

- The *Attributes* button allows you to search for words or characters with specific type styles or fonts. This is most often used in conjunction with pattern searches, but sometimes you may simply wish to locate and review all book titles or Latin terms you have entered in italic type into your index. Or you may have entered some text in a font different from the index as a whole. When you click on the *Attributes* button, any additional fonts used will be listed on the drop-down menu.

Confining the search in record fields

- You can instruct CINDEX to only “look” in certain fields of records by selecting the appropriate option from the drop-down menu immediately below the text box. When *Page* is selected, the adjacent setting *Evaluate Numbers* is automatically checked. This means that if you search for “267” CINDEX will identify it not only as a plain character string but also when it is contained within a page range, e.g. 265-268. If you literally want to search for the string “267” uncheck *Evaluate Numbers*

Bear in mind the following:

- The above options to include and exclude characters, words, and text-style attributes are also available on the Replace screen. The Replace screen also allows you to ignore, change, or remove text-styling or fonts
- Use the *Reset* button to clear the settings on the Find and Replace screens.
- Should you make a replacement in error, use the File Menu/Revert to Saved feature to restore the index to its last saved iteration.

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CHAPTER 13 *Patterns*

[: :] (character set)

Within [: :] you specify a character that is a member of a *set*. For example, [:letter:] identifies the set of letters. If you specified the pattern

[:letter:]

Cindex would find a match to any letter (in any script). To specify a character that is *not* a member of the set, place a ^ immediately after the opening square bracket, e.g.

[^:letter:]

Cindex recognizes many kinds of character sets, such as currency symbols, diacritical marks, and classes of punctuation. Table 3 identifies some of those. You can use the full name or the short name when specifying a set. The collection of character sets that Cindex recognizes corresponds to the Unicode Character Categories (see [http://en.wikipedia.org/wiki/Character_property_\(Unicode\)#General_Category](http://en.wikipedia.org/wiki/Character_property_(Unicode)#General_Category)).

Cindex also recognizes many script sets, such as [:arabic:], [:devanagari:], [:cyrillic:], [:greek:], [:han:], [:hangul:], [:hebrew:], [:katakana:], [:latin:]. For a complete list see <http://www.unicode.org/charts/#scripts>.

You can form new character sets by combining existing ones.

- To make a set that is the union of other sets, just concatenate them:
[:letter:][:symbol:] (or [:l:][:s:]) is the set of all letters and all symbols.
- To make a set that is the difference of two sets, connect them with -
[:letter:]-[:latin:] is the set of all letters from scripts other than latin.
- To make a set that is the intersection of two sets (the set of characters common to both), connect them with & :
[:letter:]&[^:han:] is the set of all letters that are not Han.

TABLE 3. Character Sets Recognized in Patterns

Name	Short Name	Character Set
[:ascii:]	[:ascii:]	ASCII character
[:letter:]	[:l:]	Any letter (in any script)
[:lowercase letter:]	[:ll:]	Lowercase letter
[:uppercase letter:]	[:lu:]	Uppercase letter
[:mark:]	[:m:]	Diacritical mark or character combined with a letter
[:separator:]	[:z:]	Any space or invisible separator
[:symbol:]	[:s:]	Any symbol, including, math, currency, dingbats, etc.
[:math symbol:]	[:sm:]	Math symbol
[:currency symbol:]	[:sc:]	Currency symbol
[:other symbol:]	[:so:]	Other symbol (none of the above)
[:number:]	[:n:]	Numeric character in any script
[:decimal digit number:]	[:nd:]	Decimal digit (0 through 9)
[:punctuation:]	[:p:]	Punctuation
[:dash punctuation:]	[:pd:]	Any kind of hyphen or dash
[:open punctuation:]	[:ps:]	Any kind of opening bracket
[:close punctuation:]	[:pe:]	Any kind of closing bracket
[:initial punctuation:]	[:pi:]	Any kind of opening quote
[:final punctuation:]	[:pf:]	Any kind of closing quote
[:connector punctuation:]	[:pc:]	Any character that connects words

From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

Demystifying indexing – keeping the editor sane! – Max McMaster

Abstract: Editors find dealing with indexes and *indexers* problematic. This paper will focus on two broad areas of difficulty – commissioning the indexer and assessing the compiled index.

Commissioning covers the initial contact with the indexer, including obtaining a quote, as well as supplying PDFs, page proofs or an edited manuscript. Assessment takes a practical approach to evaluating an index, highlighting areas of potential faults, as well as providing guidance on dealing with an index that exceeds the space allotted. Practical examples are provided.

Commissioning

As many of you will be aware, in the publishing contract between an author and a publisher, the publisher is responsible for the editing, proofreading, typesetting and printing of a text. The author, however, is responsible for the indexing, as the index is seen to be an intellectual part of the book. Only if the author cannot create the index, due to insufficient time or ability, will the publisher then engage a professional indexer on the author's behalf, and charge the cost against royalties.

As commissioning editor, once you have decided to employ a freelance indexer for the job, you need to find an indexer. There are three options:

1. Use an indexer whom you have used previously, assuming the subject matter is in their field of expertise.
2. Consult a professional colleague, from either within the publishing house or externally, to get recommendations for a suitable indexer.
3. Use the ANZSI NZ Branch's *Freelance Directory*, ANZSI's *Indexers Available*, or use the Local Publisher Forum's directory and search for 'indexer'.

Once you have selected a suitable indexer, the consultation/negotiations can occur. Contact the indexer by phone or email. Your conversation should cover the following points:

- Subject matter of the work
- Extent of work (number of pages, or number of indexable pages)
- Audience
- Number of indexes required
- Illustrations/graphics/tables, etc. – are they substantial in number, and do they need indexing?
- Space available for the index, in terms of pages, columns, or entries
- Is an embedded index in Word required, or is a standard index fine?
- Time frame for completing the index
- Cost of indexing.

The quote

Many editors expect the indexer to provide an immediate quote over the phone, without the indexer having seen the title. This is an unrealistic expectation. A better method is to send the indexer some indicative chapters as a PDF. The indexer can then choose to either index those chapters or at least estimate how long it will take to index them. Once that is done, the indexer can then provide a quote by extrapolating on the full extent of the text.

The ANZSI recommended rate for indexers is \$65/hour. The actual rate charged, however, varies enormously, with some indexers charging below this rate, and others above it. An alternative method is to charge using a per page rate. This varies from between \$2.50 per indexable page up to \$10.00 per page, depending on the complexity of the material involved. Editors, however, are generally more concerned with the final figure, rather than the method used by the indexer to get to it.

Most editors will include an allocation for indexing in their production budget. Let us assume that you have allocated \$1200 for the indexing of a particular job. If the indexer comes back with a quote of \$1100, you will most likely give the approval to go ahead. If the indexer's quote comes in at \$1300, however, you will most likely say that you need to get some additional quotes.

Another option is to inform the indexer of your budget allocated for indexing, and see if they can produce a competent index for that amount.

Once you have accepted a quotation, some publishing houses insist on written contracts, while others are happy with a verbal agreement. If you use a verbal agreement, be prudent and send the indexer an email confirming the arrangements as discussed.

The text

At this point, you can supply the indexer with either a hard copy of the text or PDFs of the document. PDFs can be supplied on CD, via a drop-box or through a publisher's FTP site. For embedded indexes, you need to provide the indexer with the edited manuscript as a Word file. Interestingly enough, some publishers are now requesting that their manuscripts and CDs be returned upon the completion of a contract, presumably for reasons of confidentiality.

During the indexing process, it is likely that the indexer will find anomalies in the text, or have queries about some aspect of the job, so be aware that you may be contacted to clarify some points. Indexers also act as unpaid proofreaders, so many indexers will supply a list of corrections when they have finished the index.

Assessing the index

Once you receive the index from an indexer, usually as an RTF or Word file, you need to make a quick evaluation of the index. This process should take approximately 10 minutes, and has two primary objectives. Firstly, it will give an overall impression of the usefulness and accuracy of the index. Secondly, it will provide an evaluation of how much editing work is likely to be required.

During this initial evaluation, you should consider the following:

- Is the index alphabetical?
- Are headings accurate and useful to the reader?
- Are subheadings logically linked to headings, or are they ambiguous?
- Is the layout logical? Can indents and turnover lines be readily understood?
- Are there long strings of undifferentiated locators?
- Have en-dashes been used in page spans?
- Are there meaningless entries?
- Are there unusual Latin expressions, e.g. *ff* or *passim*?
- Does the index contain spelling errors?
- Are there typographical errors, e.g. missing italics?
- Are cross-references accurate?
- Is there a head note to explain the use of symbols (e.g. 't' for table, 'fig' for figure), or fonts (e.g. bold or italics)?

The actual assessment

This is a three-step process.

Step 1. Read the index. Start at 'A' and work your way through to 'Z', keeping the aforementioned concepts in mind.

Step 2. Select four or five random entries from the index and look up the page numbers given, to ensure that the entries are on the pages they are meant to be. Make sure you check a variety of entries, particularly page spans, as they are often inaccurate.

Step 3. Open the text at random and look at what is on the page. Ensure that the concept being discussed is listed in the index, and that it is listed under a meaningful heading that a reader would realistically look up. Finally, ensure the page numbers match. Repeat this step four or five times.

Once you have completed these steps, you are in a position to formulate an opinion on the accuracy and usability of the index, and to determine how much editing work needs to be done.

Even if you are working with an indexer that you have used on many occasions, and their work has been exemplary, always check the index. Unfortunately, there has never been an index produced that does not have an error somewhere!

Editing/proofing the index

Minor corrections to the index, such as occasional spelling errors, can easily be rectified by the editor. Sometimes though, more work needs to be done. This is the time to talk to the indexer and get them to fix the problems you identified. After all, they are the ones being paid to produce a quality index! Point out the weaknesses/deficiencies in the index, and let them do their job. It is not the editor's responsibility to rework the index.

Cutting the index down to size

During the initial consultation with the indexer, the amount of space available for the index should have been spelled out. Sometimes, however, the index supplied is still too long. What can be done? In the first instance, you should talk to the indexer for guidance on ways of reducing the length of the index. If this is not an option, here are some strategies from an indexer on what to change or cut out.

Pruning/management strategies

- Change the number of columns, e.g. move from a two-column to a three-column layout, with a simultaneous reduction in point size.
- Remove subheadings, and incorporate the locators back into the main heading.
- Change the indexing style from indented (set-out) to run-on. Be aware that this option effectively limits you to one level of subheading.
- Delete excess or unimportant entries, e.g. entries with one or two locators only. This should be done with discretion.
- Remove turnover lines by shortening the length of headings/subheadings. Make sure the entries remain meaningful and do not become ambiguous.
- Alter the kerning (space between letters) and leading (space between lines).

There have also been some more novel approaches to pruning a long index.

- One editor solved the length problem by cutting the index at 'T', because there was not much after 'T'.
- The previous method was not even-handed, so another editor just removed every second line from the index. You can't fault it as a method, but it may be a bit extreme.

What next?

Send the indexer an acknowledgement saying you have received the index, and get on with editing/proofing the index. There are deadlines to be met!

From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

Numbers in indexing (roundtable) – Max McMaster/Mary Russell

Although indexers are very familiar with numbers as locators, numbers as entries or numbers within entries can cause the indexer considerable angst in deciding how they should be entered, or how they should be filed.

Discussion items	Summary of comments
Title entry <i>H₂O: a bibliography</i> Where in the “h’s” should it be filed?	H ₂ O – most favoured. File before Ha Or H(Two)O, or H(ydrogen) or Water
Physics – Einstein’s famous equation $E=mc^2$	In High School text? E, at top of E. But check with editor
Chemistry <i>t</i> -butyl hydroperoxide di- <i>t</i> -butyl peroxyoxalate 1,1-di- <i>t</i> -butyl peroxyoxalate	University level text Ignore the t in filings File first one under b for butyl File second two under di-butyl
2,4-D (2,4-dichlorophenoxyacetic acid) – famous herbicide. It was most commonly referred to as 2,4-D. When combined with a defoliant called 2,4,5-T (2,4,5-trichlorophenoxyacetic acid) the mixture was known as “Agent Orange”.	For general audience “Agent Orange”. Also entry for 2,4,5-T, (with qualify ‘Agent Orange’). File as number above T. Similarly file 2,4-D as number above D.
Mathematics $y=ax^2$ $y=x^2$ $y=(x+a)^2$ $y=(x+b)^2$ $y=x^3$ $y=ax^3$ In what order should these above equations be filed?	In a High School text Arranged in order of complexity. $y=x^2$ $y=(x+a)^2$ $y=(x+b)^2$ $y=ax^2$ $y=x^3$ $y=ax^3$
2D (two-dimensional) shapes 3D (three-dimensional) shapes Where should these terms be filed?	Typically as spelt out. Could do double-entry.

Discussion items	Summary of comments
Radiology – isotopes ¹³ C (carbon-13) ⁹⁹ Tc (technetium-99)	Will depend on text and editor. There are 3 options. Under ca and te
Medicine – cranial nerves (all 12 of them) first (olfactory) nerve second (optic) nerve third (oculomotor) nerve fourth (trochlear) nerve	File numerically, not alphabetically. Are full names used in text? May double post.
Medicine – multiple births Twins Triplets Quadruplets Quintuplets Should you list all the birth options, or is easier just to index as multiple births?	Double postings for general audiences under both 'multiple births' and number. File under multiple births in number order.
History - Battles First Battle of El Alemain Second Battle of El Alemain These are the titles of the battles, how should they be entered?	Assume academic text Inverted to El Alemain (First) etc. And also double post with direct entry as name of the battle.
History – Dates 17 th Century 1872 battles in Europe 6 June 1944 (D-Day landings in Normandy, World War II) Also, should it be World War II or Second World War?	Seventeenth. Chronological order. Gloss? Depends. Battle in date order? D-Day. 9/11 usually as spelt. If many dates file by month. World War One, Two.
History – Personal dates Lambert, Alfred (1794-1846) Lambert, Alfred (1817) Lambert, Alfred (1822-1843) Lambert, Alfred (?-1798)	Flourished first. Move to top.
Kings/Popes Louis VI, the Fat Louis VIII, the Lion (King of France)	As is, Louis order.

Discussion items	Summary of comments
Book/film titles 1984 (book/film) 1001 Movies You Must See Before You Die (book)	As is, how they are said. Nineteen...one thousand...
Olympiads XXVth Olympiad (Barcelona, 1992) XXXth Olympiad (London, 2012) How should these be filed and where?	Olympiad, numerical order. For a general text under location, so Barcelona Olympics (1992)
Astronomy – galaxy names M87 NGC 849 MCG-06-07-001, 4C37.11 SDSS J002240.91+143110.4 Where do you file these, and how do you file them?	At top of index before the letter A.
Telephone numbers 1300 numbers 1800 numbers 0800 numbers 0508 numbers How do we file these?	Numerical order.
<i>In Calf</i> (artificial insemination procedure manual) In this manual farmers were instructed to carry out certain procedures at designated times. The times had to go in the index under the specific time heading. So there were index entries as follows: 24 hours 3 hours 1 day 12 hours 1 week 4 weeks 6 hours 7 days 1 month What logical procedure should be used to file them, and where should they be filed?	A logical time period order, at start. Also as subheadings for procedures. Remember that 24 hours in this case is very different to one day.

Japan's indexing practice

松浦崇 (Takashi Matsuura)

Abstract

Japan is a 'major nation in index culture'. Japan has published 80% of the indexes for Chinese ancient books, but there is no organization studying indexing in Japan. This is because the worth of indexes is not accepted yet in Japan. I am presenting this paper to introduce the history of the index in Japan, and it's hopeful that Japan will have its own organization studying indexing.

1. Introduction

I feel much honored to participate in the meeting of Australian and New Zealand Society of Indexers today. There is no organization studying indexing in Japan, but there is 中国索引学会 (The China Society of Indexers)¹ in neighboring countries. I heard that's the reason why I can join the meeting as a Japanese indexer.

I am studying the classical literature of China at 福岡大学 (Fukuoka University)² and I have compiled 17 kinds of indexes up to now. I am interested in indexing and belong to The China Society of Indexers. I have attended many meetings in China as a creditable director for more than 10 years.

My arrangement in the indexes is different from English-speaking countries which use the alphabet as the mother language; most of my indexes are in Chinese characters.

Today, I want to make comments about indexing's history and present situation in Japan, especially indexes of Chinese study. Japanese people are very diligent and have made many indexes. I want to talk about the merits and achievements of indexes made by Japanese indexers.

2. The meaning of the index

As the famous saying goes, '*books without an index are countries without a map*', '*an index is a lighthouse in the sea of vast books*'. Knowledge of an index is a necessity. We have to know how to use an index. If not, efficient academic research cannot be performed. Besides, knowing how to make an index is helpful to publish academic books in the future. To learn to use an index or to compile an index, it is

¹ The China Society of Indexers is a scientific organization which does index compilation and index research. It was established in Shanghai in 1991 and the present membership is over 1000 people.

² Fukuoka University is a university which has 9 faculties, 31 subjects of study and 20,000 or more students in the private university in northern Kyushu in Japan.

necessary to know the index's function, importance and history.

China's famous index scholar defines an index as:

*Based on special needs, contents in some limited literature, such as words and sentences, names of people, places, books and episodes, items and so on, are given clear indication where they are come from. They are arranged in a particular way hence retrieval tools are used to search the well-arranged information, and we call that '通檢 (tong jian)' or '引得 (yin de)'.*³

'INDEX' in Japanese is '索引 (sakuin)'. The word 'sakuin' was first used by a Japanese scholar 松井簡治 (Kanji Matsui • 1863~1945). His '国語の索引 (Kokugo no sakuin)' was written 115 years ago in 1898. In China they didn't call it '索引 (suoyin)' but '通檢 (tongjian)' and '引得 (yinde)' before. Now the word '索引 (suoyin)' is very commonly used in China.

Today, it is common to carry a "table of contents" before an "index" at the back of academic books. In some countries, academic books without an index cannot be published. With an index, it can be possible to read selected, required information rather than the whole book. Nowadays, the flood of information makes the index an urgent requirement.

3. Index compilation in Japan before the War

First of all, I will introduce the history of the index in Japan. Japan is a 'major nation in index culture' which is admitted by Chinese scholars. Influenced by Chinese culture, Japan has made compiled indexes of Chinese ancient books.

*Japan not only has an orderly index culture, but also tries hard to gather other countries' political cultural information. For instance, there are more than ten thousands scholars who are studying China's problems. From the old time to the modern time, the scholars are studying in every field including politics, economy and culture. What deserves additional attention is that almost all of them have compiled indexes in their own fields.*⁴

Other countries' Sinology researchers also value the indexes of ancient books. Among them Japan dominates. According to incomplete statistics, among all the Chinese ancient books published by the publishing houses in the world, Japan has

³ 潘樹広 (Pan Shuguang • 1940~2003) “古籍索引概論 (Index introduction of ancient books)” ・ 書目文献出版社 (writing literature publishing company) ・ 1984.

⁴ 劉迪 (Liudi) ‘索引文化大国 (Major nation in index culture)’ ・ “中国索引 (Journal of The China Society of index)” The 1st volume 1st term • 2003.

*published 80% of them, which shows Japan's important status and significant work in the field of Chinese ancient books' arrangement and study.*⁵

Indexes have three aspects, including catalog, dictionary and the books containing analogous content. Japan's history of indexing can be dated to the end of the 8th century and the most important part in its history is the compilation of the dictionary. During the 平安 (Heian) Period, the first dictionary using the radical ordering for kanji arose. During the 室町 (Muromachi) Period at the end of the 15th century, “節用集 (Setsuyoshu)”⁶ which firstly used ‘iroha’ ordering appeared; ‘iroha’ in Japanese is same to ‘ABC’ in English. Academic dictionaries usually use the radical ordering.

In modern times, many books written in Japanese like “和漢三才図会 (Wakan sansei zue)” (year 1713)⁷ began to be published. The situation required a more efficient way to index. The gojuon (Fifty Sounds) was then developed to order for books such as “俚言集覧 (Rigen shuran)”⁸, “群書搜索目錄 (Gunsho sousaku mokuroku)”, which is regarded 'the pioneer of Japan's indexing'. “Gunsho sousaku mokuroku” is used to search the collective books possessed by 小山田与清 (Tomokiyo Oyamada • 1783~1847) ‘gojuon’ ordering is Japanese alphabetical order, ‘a i u e o’.

During the end of the 19th century, some Japanese dictionaries using the gojuon ordering like “言海 (Genkai)” written by 大槻文彦 (Fumihiko Otsuki • 1847~1928) and “日本大字典 (Japanese Big Dictionary)” written by 山田美妙 (Bimyo Yamada • 1868~1910) were published.

Different from the broad sense of an index, a more narrowly conceived definition of an index appeared originally in Japan after the Meiji period (the beginning of the 20th century. In Japan 太田為三郎 (Tamesaburo Ota • 1864~1936) first compiled indexes for books. He compiled indexes like “日本隨筆索引 (Japanese essay index)” (year 1901).

In 1916, 物集高見 (Takami Mozume • 1847~1928) indexed “群書索引 (Gunsho sakuin)”. He and his son 物集高量 (Takakazu Mozume • 1879~1985) both made a great contribution to the development of the index. Takami, the father of Japan's index, though he lost his eye sight, still had worked for 30 years to compile “広文庫 (Koubunko)”⁹ and “群書索引 (Gunsho sakuin)”. These two books were compiled

⁵ 陳東輝 (Chen Donghui • 1966~) ‘中国古籍索引工作的回顧与前瞻 (The previous and approaching work on Chinese ancient books index)’ “索引的昨天今天和明天 (The history and future of index incorporatorates)” 1994.

⁶ “Setsuyoshu” is a kind of the collection of ways to use characters and Japanese dictionary published briskly at the Muromachi period.

⁷ “Wakan sansei zue” is the illustrated encyclopedia published around 1713.

⁸ “Rigen shuran” is the Japanese dictionary which 太田全齋 (Ota Zensai • 1759~1829) edited in the late 江戸 (Edo) period.

⁹ “Koubunko” is the encyclopedia which compiled the quotation from the literature before 明治

for indexing in the beginning period. “Gunsho sakuin” lists all the fifty sounds (gojuon) and shows how to search the reports in other books. It is a precursory literature of modern times' encyclopedia. And ‘物集索引賞 (Mozume Prize for index)’ was then founded to commemorate the Mozume. They deserved to be commended for the great contribution to Japan's indexing. 柳田國男 (Kunio Yanagida • 1875~1962) considered the index necessary.

It's hopeful that indexers pay attention to the repetition of the books and compile a more detailed index. It can at least save some time for the later age's researchers. To classify the knowledge clever minds are needed. Though it costs much time and money to make some books such as “古辭類苑 (Kojiruien)”¹⁰, it cannot be helped.

Kunio Yanagida wrote a passage ‘There are too many books’ almost 100 years ago. At that time, there were not so many books like nowadays, but Kunio Yanagida, a Japanese famous folk-custom scholar, said the index was very important in his report.

Before the World War II, 森本角藏 (Kakuzo Moromoto • 1883~1953)'s “四書索引 (Sisho sakuin)” (year 1921) and “五經索引 (Gokyo sakuin)” (year 1935) were genuinely indexed in Japan in Chinese literature fields. China's first one-character index was used by 蔡廷幹 (Cai Tinggan • 1861~1935) in “老解老 (Laojielao)” (year 1921), published in 20th century 20s. It was an active time in China and they call that ‘index innovation’.

4. Index compilation in Japan after the War

Before the World War II, there were indexes focused on Chinese ancient poetry. 佐久節 (Misao Saku • 1882~1961)'s “漢詩大觀索引 (Kanshi taikan sakuin)” (year 1943)¹¹ was a representative master piece of work.

Compared to China, Japan began its index innovation in the 1950s, 30 years after China. In 1954, “文選索引 (Monzen sakuin)” was published and it showed huge progress in Japan's indexing. It is still used nowadays. People know “Monzen sakuin” was compiled by 斯波六郎 (Rokuro Shiba • 1894~1959) from Hiroshima University. But actually my teacher 岡村繁 (Shigeru Okamura • 1922~) from Kyushu University devoted himself to the index. My teacher directly told me that it

(Meiji) Era into one book.

¹⁰ “Kojiruien” is the large encyclopedia dictionary whose compilation started as a national large project in the 明治 (Meiji) Period in 1879, and was published from 1896 to 1914. The classification of the ancient affair.

¹¹ “Kanshi taikan” is poetic works which collected the poetical works from Chinese ancient times to 宋 (Song) Period.

was very hard to index manually at that time because of the tin pot printing and the lack of paper. Professor Okamura wrote a magnificent piece of work “文心雕龍索引 (Bunshin tyoryo sakuin)” in 1950. Professor Okamura is a distinguished scholar studying the 清(Qing) Dynasty. His meticulous work attitude earns him high praise from Chinese scholars. My starting to index was also influenced by Professor Okamura.

Famous poets in the 魏晉南北朝(WeiJing Nanbei)Dynasty like 阮籍(Ruan Ji)・嵇康(Ji Kang)・陸機(Lu Ji)・陶淵明(Tao Yuanming)・鮑照(Bao Zhao)・謝靈運(Xie Lingyun)・謝朓(Xie Tiao)・庾信(Yu Xin)had lots of masterpieces and most of them were indexed by Japanese scholars. In Japan, many scholars are studying the WeiJing Nanbei Dynasty. Thanks to “Monzen sakuin”, scholars are able to compile indexes easily.

When I compiled an index, I always referred to “Monzen sakuin” and “楚辭索引 (Soji sakuin)”, which was compiled by 竹治貞夫(Sadao Takeji・1919～1997).

Among ancient China, the 唐(Tang) Dynasty is the richest in poetry. Tang poems are studied a lot in Japan by many scholars. Japan is very proud that many masterpieces are compiled by Japanese scholars like 都留春雄(Haruo Tsuru・1926～)'s “王維詩索引 (Index for WangWei's poem)” (year 1952)・花房英樹(Hideki Hanabusa・1914～1998)'s “李白歌詩索引 (Index for Li Bai's poem)” (year 1957)・平岡武夫(Takeo Hiraoka・1909～1995)'s “白氏文集歌詩索引 (Index for poem in白居易 (Bai Juyi)'s anthorozy)” (year 1989)・山内春夫(Haruo Yamauchi・1923～)'s “杜牧詩索引 (Index for Du Mu's poem)”(year 1972) etc.¹²

The feature of Japanese scholars is their carefulness. While using 'one word ordering'(一字索引 ichiji sakuin) the scholars must check carefully for the meaning of some patterns and sentences, according to some exact principle. Scholars think it's necessary to do so to compile the index veraciously. The hardest work for index experts is toindex according to the meaning of patterns and sounds to determine the context rather than just using the words. Computers are able to recognize kanji in an already set way and it can search things in a moment so long as people give a command. However, setting and finding the specific knowledge is human's work. I think in the development of the index afterwards, computers can do their work given by humans but things only humans can do should be done by us.

¹² The poets of the Tang dynasty which the Japanese researcher edited are as follows: 駱賓王 (Luo Binwang)・杜審言 (Du Shenyan)・王勃 (Wang Bo)・沈佺期 (Shen Quanki)・陳子昂 (Chen Zi'ang)・孟浩然 (Meng Haoran)・王昌齡 (Wang Changling)・杜甫 (Du Fu)・岑參 (Cen Can)・孟郊 (Meng Jiao)・張籍 (Zhang Ji)・韓愈 (Han Yu)・柳宗元 (Liu Zongyuan)・元稹 (Yuan Zhen)・錢起 (Qian Qi)・李商隱 (Li Shangyin)・溫庭筠 (Wen Tingyun)・皮日休 (Pi Rixiu) etc.

5. The method of my index making

I have compiled 17 indexes as following:

- 1 “Poetry of the ‘嵇康(Ji Kang)anthology’ index” 1975
- 2 “Articles of the ‘嵇康(Ji Kang)anthology’ index” 1981
- 3 “Persons of the ‘嵇康(Ji Kang)anthology’ index” 1983
- 4 “Poetry of the 漢(Han)dynasty index” 1984
- 5 “Poetry of the 三国(Sanguo)dynasty index” 1985
- 6 “Poetry of the 北魏(Northern Wei)dynasty index” 1986
- 7 “Poetry of the 晋(Jin)dynasty index” 1987
- 8 “Poetry of the 北齐(Northern Ji)dynasty index” 1987
- 9 “Poetry of the 齐(Ji)dynasty index” 1989
- 10 “Poetry of the 北周(Northern Zhou)dynasty index” 1990
- 11 “Poetry of the 宋(Song)dynasty index” 1992
- 12 “Poetry of the 陳(Chen)dynasty index” 1993
- 13 “Poetry of the 隋(Sui)dynasty index” 1994
- 14 “Poetry of the 梁(Liang)dynasty index” unpublished
- 15 “小西昇 (Noboru Konishi)'s ‘Collected papers of 樂府 (yuefu) in the 漢 (Han)dynasty and poetry of 謝靈運(Xie Lingyun)'s index” 1983
- 16 “岡村繁(Shigeru Okamura)'s ‘Research of 文選(Monzen)'s index” 1999
- 17 “林田慎之助 (Shinnosuke Hayashida)'s ‘The history of the China medieval literature criticism index” 1980

It was in my days at 九州大学 (Kyushu University)¹³ that I began index compilation in response to the influence of Shigeru Okamura in 1974 about 40 years ago. It was a time also where I was without a personal computer and a satisfactory copy machine in those days. Nobody taught me how to compile an index but I had compile an index of the poetry, text, and name of 嵇康(Ji Kang) all by myself.

I want to introduce the process of the "traditional index" compilation which created the index with the card system, although the index was created making full use of the computer.

1. writing
2. stroke counting
3. cutting (cards)
4. classification according to stroke counting

¹³ Kyushu University is the National University which was established in 1911. A campus is located in Fukuoka in northern Kyushu with a faculty of 11, a graduate school of 17, and it has a research institute of 16.

5. classification according to character
6. extraction of idiom
7. attachment and copy
8. check A
9. check B
10. check C
11. correction
12. word processor input (it was written by hand before)
13. reconfirmation
14. form making
15. last work (form making, a horizontal title, and a preface).

On account of the time, although the explanation of each work is omitted, index compilation takes a terrible amount of time and is a labor.

Large-scale index compilation is performed today, making full use of the personal computer. Although a personal computer is useful for the purpose of looking for an example and to search, it is not only a function of an index for the index to be used as a research tool in a large-scale index. An index has two convenient functions of "search of a source" and "search of an example."

However, in addition to this, an index has another function. It says that it is only looking at the index and one certain "world" is in sight. It is because the index is shown in the form which condensed the essence of the book. If it not only looks at a "table of contents", but looks at back "index" when a thick scientific book is gained, the character of the scientific book is in sight.

It reads over long time ⇒ a theme is found ⇒ it proves.

Change the conventional study technique by 180 degrees.

A theme is found in short time ⇒ only a required part is read ⇒ it proves.

A wonderful tool called the index makes new study method possible.¹⁴

6 . Japan Indexers Association

There is no ‘日本索引学会 (The Japanese Society of Indexers)’ in Japan, however, there is an institute which is called ‘日本索引家協会 (Japan Indexers Association)’. The major members in this institute are 石山洋 (Hiroshi Ishiyama • 1927～)、井

¹⁴ Please refer to “わかりやすくおもしろい中国文学講義 (An intelligible interesting Chinese literature lecture)” p.209～p299 • 中国書店 (China bookstore) • 2002.

上如 (Hitoshi Inoue・1933～)、河島正光 (Masamitsu Kawashima・1933～)、深井人詩 (Hitoshi Fukai・1935～)、長沢雅男 (Masao Nagasawa・1933～)。

Japan Indexers Association had published a famous book called “書誌索引展望 (Bibliographic index view) ”. In the first page, Hitoshi Inoue had written the following paragraph:

Index experts always consider indexing as an endless kind of work. Due to the huge amount of work, some index experts' eye sight are getting worse and some of them even delayed their best time for wedding. Though it's just a figure of speech, feeling joyful, index experts can write down on some blank cards at anytime and anywhere. In Britain and American, more index experts consider indexing as a subject of art instead of science. It's important to study more on index experts' personalities.

Users who are using completed index give two significant aspects:

1. Using the index is enjoyably. Index experts devote themselves happily to the index making and it's a pity for the users if they can't feel that kind of happiness when they are using the index. An uncomfortable index surely will make the index maker feel less interested in the book's content and the maker will do his or her work reluctantly. So it's necessary to avoid this problem.

2. Two situations will probably exist: The index leads the readers to find the right page and the reader successfully get what he or she wants. On the reverse side, readers watch the index constantly and miss the entire content of the book. Reading is a sort of discovery, using the index is another kind of discovery, in other words, an index is different from the content. This should be distinguished at the very beginning.

Though compiling index costs much time and labor, but it's certainly not painful. Because the time and labor spent will surely lead to a good result. It's clearly that the people who use it will have an enjoyable experience. If you were not the indexer, you would not realize the happiness.

Japan Indexers Association's members have increased from 100 people to 700 people in 20 years. There are many association activities. It includes not only index compilation, but also strengthening the theory researches and gaining learned achievement. In 1983, “索引作成マニュアル (The manual for index compilation)” was published. New achievements have been gained by using computers to compile indexes, but it was dismissed in 1996. What a shame.

7. Conclusion

What a shame that there is no Japanese Society of Indexers although Japan is called the big country of indexing culture. There are many books about studying indexing in China, but in Japan, there are only few books like 稲本徹元 (Tetsumoto Inamoto • 1928~)'s “索引の話 (Talk of an index)” (year 1977) and 弥吉光長 (Mitsunaga Yayoshi • 1900~1996)'s “索引の研究 (Index's study)” (year 1981).

Editors create indexes according to their own view, and the appearance of an index is varied. Even if they adopt an arranging method, there is a Chinese order of pronunciation, Japanese order of pronunciation, order of a stroke count, and radical exception etc. And they are various.

Japan is prolific with the compilation of indexes, but research of indexing is behind because the value of the index itself is seldom evaluated in Japan. A paper is estimated by the achievements of the researcher of a university, it is a work and it is a society announcement. Huge time and labor are applied to index compilation, and it is moreover intellectual work. A work and a paper's value will decrease with time passing, but index will continue its values.

An index is indispensable to all learning. The day which sets an index as the object of learning I regard as a certainty coming again even in Japan. I believe that the boom of indexing study will certainly come again in Japan.

The members of the China Index Society came to Japan for the purpose of inspecting libraries in Japan several years ago. Japan is the wonderful country blessed with a rich nature. Please come to the country in which industrious and polite Japanese live. Thank you for your attention.

ANZSI conference 2013

UNDERSTANDING ASIAN NAMES

Asian writing systems

	Languages include:	Example of name	Romanised version
Logographies	<u>Chinese</u> , Japanese kanji	胡锦涛	Hu Jintao
Syllabaries (true)	Japanese <u>hiragana</u> & katakana	みつびし	Mitsubishi
Syllabaries (abugida)	<u>Hindi</u> , Punjabi, Bengali, Sinhalese, Thai, Burmese, others	दिव्याअरोड़ा	Divya Arora
Alphabet (Roman)	Vietnamese, <u>Indonesian</u> , Malay, Tagalog	Hartanto	Hartanto
Alphabet (other)	<u>Korean</u>	김명미	Kim Myong-Mee

Romanisation

During the colonial period, Europeans started to write down local names and words in the countries they colonised using the Roman alphabet. They did this by spelling what they heard using the pronunciation rules of their own languages. When looking at romanised names, bear in mind that:

- Pronunciation may not be clear from the spelling for a modern day English speaker, because the name may have been spelled by colonists from France, Portugal, the Netherlands or devised by linguists applying pronunciation rules very different from those seen in English.
- Different languages use different sets of sounds. Sounds and other features (e.g. tones) not present in the colonial language had to be approximated by using the letter with the closest sound (e.g. 'ra' for the Japanese ら), adding diacritics (e.g. Lê), or inventing a new letter combination (e.g. Kh in Khan)
- Romanisation is often inconsistent, and it's not uncommon for the same person's name to be written using two or more different spellings. Even where a consistent romanisation system is being applied, spelling may be variable due to misuse of the system, the influence of competing or obsolete systems, etc.

Notes

Name structure

Given name/s + surname

		Given name/s	Surname
Anglo		Anne	Taylor
Nth India, eg:	Hindi Punjabi Bengali	Haresh Baldeep Sanghamitra	Sharma Kaur Ganguly
Sinhalese		Dilhani	Goluhewage
Thai		Peerapat	Tantipitakpong

Names from some Asian languages are structured in a similar way to Anglo names. Note, however, that there are often cultural differences in how they are used.

Unstructured

	Child's name	Mother's name	Father's name
Javanese	Suharto	Sukirah	Kertosudiro
Burmese	Htein Lin (later Aung San)	Daw Suu	U Pha

Javanese and Burmese names contain 1-5 components, but rarely have any inherited component.

Patronymic

	Child's name	Father's name
Malay	Siti Aminah bt. Md. Rizwan	Md. Rizwan b. Md. Jamil
Tamil	Srinivasan s/o Ramanathan or R. Srinivasan	Ramanathan s/o Balasubramaniam or B. Ramanathan

Patronymic names incorporate the father's given name, often preceded by s/o, ibn or bin (son of) or d/o, binti or binte (daughter of). There is no inherited "surname" as seen in Anglo names.

Confucian

	Family name	Given name
Chinese	Hu	Jintao
Korean	Park	Myong-Mee
Japanese	Yamamoto	Akiko
Cambodian	Say	Sok Kunthea*
Vietnamese	Nguyễn	(Thị**) Hồng Hoa*

Confucian names place the family name first, rather than last. Chinese and Korean names typically use the traditional, three-character structure; the other languages listed have diverged. Note the last component only is used for informal address among the Cambodians and Vietnamese, and that a gender marker (Thị for women, Văn for men) may follow the family name, though this is becoming obsolete, especially among men.

Understanding Asian Names: Summary of paper

In my paper, I began by describing my work with international students, during which I discovered that using Asian names causes considerable stress for university staff. Issues relating to Asian scripts and how these have been romanised are one of the main sources of this stress.

I outlined the three major types of scripts used in Asian countries—logographies, syllabaries and alphabets—showing my audience where in the world each type is used, and giving an example of an Asian name in each one. I then covered each type of script in more detail. For logographies, I used Chinese characters as an example, and explained how they were developed and the fact that a single character can have a number of different readings because there is no direct connection between how a word looks and how it sounds. For syllabaries, I provided examples from Japanese hiragana (a true syllabary), Devanāgarī and Thai (both abugidas); for alphabets I listed Asian languages which use the Roman alphabet and contrasted this with the alphabetical *Hangeul* script used for Korean. To wrap up the first half, I summarised potential issues related to romanisation which are relevant to indexers, including the colonising country who developed the system being used, difficulties with transcribing sounds and features not present in the target language and complications arising from the romanisation system being used.

In the second half of the presentation, I detailed four different types of name structure found in Asian countries. I began with the given name/s + surname structure seen in Anglo-Saxon names, providing examples of Asian names in this format and explaining cultural differences in how this format may be applied. Next I looked at unstructured names where there is no inherited component, with examples from Javanese and Burmese, followed by the patronymic name structure seen in southern India and many Islamic countries, in which the father's given name is included in the names of his children. The last structure I looked at was the three-part Confucian structure, and how this is typically adapted for use in English-speaking contexts.

Indexing tips and traps; Practical approaches to improving indexes and achieving ANZSI Accreditation

Sherrey Quinn

Paper presented at ANZSI Conference, Wellington, 15 March 2013

Abstract

Using the evidence-base of ANZSI Registration/Accreditation records, the paper discusses common shortcomings observed in indexes submitted for ANZSI Accreditation, and gives tips for avoiding them and achieving Accreditation. Shortcomings—‘traps’—include poor choice of main heading (such as lone adjectives); incomplete subject analysis, with broad concepts overlooked in a focus on fine detail; failure to gather ‘like concepts’ and poor synonym control; ‘classified’ entries; over-analysis of single pages; unacceptably high numbers of undifferentiated locators; and inconsistencies in locators for double-posted entries. Tips for improving indexes and achieving Accreditation include: attend training courses; consult the standard texts; pay attention to the basic principles of indexing; practise, practise, practise, perhaps in collaborative or volunteer projects; find a mentor; network with colleagues; read award-winning indexes, and gain some experience before applying.

The context is ANZSI’s Accreditation process, so the paper also explains the criteria, how the Board of Assessors evaluates an index, what Assessors are looking for, and the benefits of Accreditation to the Society and individual members. The corresponding workshop at the conference included group discussion and practical exercises. The paper encourages ANZSI members who are not yet Accredited Indexers to practise, reflect on their work and to pursue the achievement of Accreditation.

Introduction

This paper and the corresponding workshop shed light on ANZSI’s accreditation process for ‘back-of-book’ style indexing and provide opportunities for indexers to learn from the accumulated experience of the Board of Assessors. It covers ANZSI’s requirements and criteria for Accreditation, explains how the Board of Assessors evaluates an index, and comments on what the Assessors are looking for. This paper sits within the context of ANZSI’s broad initiatives on training, peer review, and professional development.

ANZSI’s first two aims are to:

- improve the quality of indexing in Australia and New Zealand
- promote the training, continuing professional development, status and interests of indexers in Australia and New Zealand.

ANZSI’s Accreditation program and its initiatives for training, peer review, and professional development support these aims within, of course, the constraints of a small society heavily dependent on volunteers.

The intent of this paper is to further ANZSI’s aims – not to focus on errors and poor practice, but to provide opportunities for reflective practice and improvement.

A recent discussion of the development of expertise in adults refers to the practice of challenging oneself and interest in improvement. ‘Experts’ learn from their own mistakes, and make changes to

their behaviour or practice based on recognising their own errors or with the help of mentors. 'Experienced non-experts' may have as much experience as 'experts' but with less interest in self-improvement or less inclination to self-criticise, lack of access to mentors, tendency to repeat mistakes and, perhaps, lower levels of aptitude. 'Novices' (beginners) don't have as rich a knowledge base as experts, and can be slower in recognising situations and solving problems (from Chi et al 1988, cited in Byrnes & Bernacki 2013, p. 23).

Not everyone is interested in improving performance or achieving 'expert' status, nor is everyone interested in achieving Accreditation, but ANZSI is offering opportunities for members to do so if they wish.

Accreditation

Background

AusSI/ANZSI has had an accreditation process known as 'Registration' for many years. It applies to indexers who write 'back-of-book' style indexes, but not yet to database indexers (a topic beyond the scope of this paper).

The Australian Society of Indexers Registration scheme and Register of Indexers was established in the late 1970s. Sylvia Ramsden reported in *The Indexer* in 1977 that 'We are in the process of setting up a panel of experienced indexers with a view to starting a Register of Indexers, and members have been asked to submit a completed index for assessment' and expressed the hope that the Register might help forge a link between members of the Society and publishers and authors. (Ramsden 1977).

The scheme, to provide for a list of people competent in indexing, was modelled on the Society of Indexers (SI) Register which was first established in 1968 to replace the former Panel of Indexers. The SI scheme had a Register, a Board of Assessors, and rules and procedures for assessing the suitability of indexers to be added to the Register (Bell 1998). Clyde Garrow and Jean Hagger (1979) stated that the Australian Society of Indexers 'is planning to establish a Register of Indexers, somewhat similar in character and operation to that of the "parent" society'.

In readily-available ANZSI Registration records the earliest year noted is 1983, but several members in the Register do not have dates of Registration listed—these include Jean Hagger, an early member of the Society, who presumably attained Registration prior to 1983.

Since its establishment the topic of Registration has been aired frequently in the Newsletter—revealing disparate points of view—in the contexts of education and training, professional development, and membership categories.

Requirements have varied from time to time – for example, in 2001 it was necessary for an indexer to have had at least two indexes published in addition to the index submitted for assessment (Cousins 2001). This change was made because of

a common misconception is that registration is for new indexers. (Michael Wyatt, reported in Walker 2001).

Wyatt added that the purpose of Registration is

to indicate that an indexer has a number of years of experience and is able to produce an index of above average quality. You do not need registration to practise indexing. Registration can be seen as a gold licence, not as a P plate.

This purpose was reiterated in 2006, when the then President wrote of

the strong belief of the [National] Committee that Registration should be a recognition of quality in indexing rather than a 'base' qualification (Farkas 2006, p. 1).

This approach is still followed today, although the current procedures no longer specify prior publications.

The procedures have been amended and reviewed from time to time, most recently in the period 2010–13 with the adoption of a new label, Accreditation, in 2012 and a revised policy agreed at the March 2013 Council meeting but without the provisions on renewal of accreditation. The issue of renewal of accreditation is still under discussion at the time of writing, and it too is beyond the scope of this paper.¹ Before 2010, Registration policy and procedures were reviewed in 2006 at the GAMES² strategic planning meeting (when renewal provisions were introduced), ratified by the National Committee on October 2006 then published in the members' area of the website where they have been available ever since.³

The assessment criteria have never been credibly challenged and continue in the 2013 policy.

Purpose of Accreditation

The Accreditation Policy states that the aim is to be a credentialing standard for indexers who have demonstrated expertise and gained some experience in indexing. Accreditation performs a number of functions:

- recognising the quality of an indexer's work as assessed by a panel of experienced indexers
- acknowledging the professionalism of an indexer through its requirement that only published indexes are reviewed. Having an index published attests to the indexer's ability to perform work under marketplace conditions, constraints and deadlines
- assuring potential clients that an Accredited Indexer has met established criteria for acceptable indexing.

Not all competent, or indeed expert, indexers are Accredited, nor wish to be. However, achievement of Accreditation indicates that an indexer has a general level of competency, measured against accepted indexing practice and agreed criteria.

Benefits of Accreditation

Those who have been involved in the Registration assessment process, ANZSI Council and previous National Committees acknowledge that there are benefits in having an accreditation process.

Benefits for ANZSI are that it:

- is an objective measure of the competence of an indexer because of assessment against published criteria based on standard indexing practice and conventions
- is a benchmark for editors and publishers who have no experience of employing indexers, and want to ensure that the index they commission will be good quality
- contributes to the image of ANZSI as a professional body and the credibility of indexers as skilled professionals, particularly in a work environment where related professions such as editors and librarians have an accreditation process⁴
- demonstrates interest in professional development and ongoing improvement of performance.

¹ However, it is clear from the 2012 survey of members that there are misunderstandings about the process, with the two principal myths being that the current renewal process requires re-assessment of an index (it does not) and that it is time-consuming and cumbersome (it is not). Forthcoming discussion at Council and Branch level should canvass the pros and cons of 'renewal' and confirm or develop an appropriate process.

² The GAMES (Guidelines, Archives and Mentoring for the Society) Meeting May 2006 was attended by members of the then National Committee, all Branch presidents and senior members of the Society. The meeting developed ANZSI's policy framework, which was subsequently adopted at the National Committee meeting of 8 October 2006. Reports on the GAMES meeting appeared in the *ANZSI newsletter* vol 2, no 6, July 2006 (p. 7) and no 7, August 2006 (p. 1 & 3), and all policies were published on the ANZSI website.

³ The Accreditation policy and criteria are available in the members-only ANZSI Documents area of the website: http://www.anzsi.org/site/anzsi_docs.asp

⁴ The 2012 member survey indicated that among those who are not full time indexers, the most frequently nominated options for other paid work were editing (30% of all respondents), proofreading (22%) or library work (20%) (Russell 2012), p.3 & 4.

As a former ANZSI President said:

Our goal is to further the professionalism of our members, and the reputation of our profession. To this end, we offer our Registration, a peer review system that promotes a basic standard of quality in indexing. In the absence of a formal academic course of study through our tertiary education system, we believe our Registration has come to be a benchmark against which indexers evaluate their work, and which potential clients can use as assurance of general quality.

Over the years, our most experienced indexers have given their time to serve as chairs or members of the Registration Panel, and the comments and advice they provide to those who submit indexes for registration are an invaluable benefit of membership. (Farkas 2005)

Apart from benefits to the society, there are personal benefits for indexers:

- confirmation of competence and recognition of expertise
- building and reinforcing confidence in your own ability
- indication of an indexer's ability to work within commercial constraints and deadlines
- helpful in getting referrals from other indexers
- positive recognition that can be cited when tendering for indexing jobs and marketing services.

Accredited (then 'Registered') Indexers are divided on the benefits, though it appears that more see benefits than see no advantage. In the 2012 survey, Registered indexers were asked to 'How do you think Registration has benefited/not benefited your career?' Thirty three respondents commented (Table 1).

Table 1. Registered indexers responses to the question: 'How do you think Registration has benefited/not benefited your career?'

How do you think Registration has benefited/not benefited your career?	
Don't know	2
Don't know – but probably a benefit	7
Don't know – but probably not a benefit	1
Yes – have benefited	16
No – no benefit	7

Source of data: 2012 ANZSI Survey Results; Full results section 2 (Council document 36/129, by Mary Russell) (Analysis by Quinn)

A few indexers gave evidence of Registration has conferring an advantage: one respondent had a change of duties and a pay rise from his/her employer as a result of Registration; and at least three knew that it helped attract work. Those who believed there are definite benefits, and some who didn't know for sure but suggested possible benefits, mentioned confidence, indication of credibility, that it helped in getting referrals from other indexers, or that it gave an edge in a listing such as *Indexers Available*.

Among the seven who saw no benefit/no effect were one respondent who has not been looking for paid work; one who has found work through networking but not through being Registered; and another who hasn't needed to market his/her services but would use Registration as a selling point if he/she had to.

Accredited Indexers

At 6 March 2012 ANZSI has 209 members. At that date there were 43 Accredited Indexers, or nearly 21% of the total membership.

Most but not all Accredited Indexers are listed in *Indexers Available*. In the 2012 survey of members 76% of respondents were listed. Those not listed indicated that the main reasons for not being listed are 'lack of experience or unavailable' (Russell 2012, p 3). Slightly less than half the total membership responded to the survey and about one third of the respondents were Registered (now 'Accredited') Indexers.

Most members of ANZSI are freelancers (including 71% of survey respondents). However, not all members of the Society are practising indexers: some are members because of a general interest in indexing, some have retired from indexing, some work in jobs which have an indexing component, and a small number are institutions (e.g. government departments). Few are full-time indexers: 67% of survey respondents earn less than 25% of their income from indexing, and only 13% earn more than 75% of income from indexing. 76% of respondents earned less than \$15,001 from indexing in financial year 2010–11.⁵

Applications for Registration/Accreditation since April 2008

Table 2 shows Registration application numbers and success rate since April 2008.

Table 2. Registration application numbers and success rate, April 2008 to March 2013

Last 5 years (since April 2008)	Applications (total)	Successful	Unsuccessful	In Progress	Withdrawn
	17	5	10	-	2

Source of data: Records maintained by the Receiving Officer, Accreditation

Seventeen applications in five years, with a 33% success rate for those finalised. Why is this so low? We're not sure: the Society has good trainers, with good content. Perhaps people need more practice, and/or more self-analysis and improvement of their own work before they apply.

Indexers not yet 'Registered/Accredited' were asked in the 2012 survey if they plan to seek Registration. Over half (27) of those responding to the question said 'yes'.⁶ They are encouraged to do so and some notes which may help in applications are included later in this paper.

Accreditation processes

Board of Assessors

The Board of Assessors currently has six members, five of whom (including the Chair) can act as assessors, and one (the Receiving Officer – Accreditation) who handles the logistics and secretarial matters but does not act as an assessor. Members of the Board, other than the Receiving Officer, must be Accredited Indexers each with a minimum of twenty published indexes, and are selected to ensure a broad coverage of subject expertise. Many medal winners and senior members of the Society have served on the Registration Committee/Board of Assessors in the past.

Accreditation assessment criteria

Indexes submitted must deal with subject matter complex enough to require more than one level of index heading, and be substantial in size. The book/index should be published by a commercial, academic or scholarly publisher or outside agency, not self-published.

The criteria against which applications are assessed embody the basic principles and conventions of back-of-book indexing. Criteria are divided into three broad groups, as illustrated in Table 3.

⁵ ANZSI Council document 36/129: 2012 ANZSI Survey Results; Full results, sections 10, 11 and 12

⁶ ANZSI Council document 36/129: 2012 ANZSI Survey Results; Full results, section 6.

Table 3: Summary of Accreditation criteria from the ANZSI Accreditation Policy

<p>1. Identification of relevant material</p> <p>A. Analysis</p> <p>The index submitted should be subject-based, containing terms for concepts as well as for objects and names. It should have main headings and subheadings (at least one level), with concepts analysed so that long strings of undifferentiated locators are avoided</p> <p>Double entry is expected where appropriate. Cross-references should lead the reader from synonymous terms to the chosen entry term, and indicate related headings.</p> <p>B. Description</p> <p>Language should be succinct, but reflect the language of the text. Alternative expressions familiar to the book's audience may be needed in cross-references.</p> <p>The relationship between a heading and its subheadings should be unambiguous, with prepositions used for clarification if necessary.</p> <p>C. Comprehensiveness</p> <p>Comprehensiveness means the index should provide access to all topics of potential interest to the book's intended audience.</p> <p>D. Arrangement</p> <p>Arrangement should be logical, usually alphabetical, but another order, such as chronological, may be appropriate for subheadings.</p> <p>2. Style</p> <p>Stylistic conventions (such as italics to indicate illustrations) should be explained in a brief introduction.</p> <p>3. Processing</p> <p>This criterion is about accuracy – accurate page references, no spelling errors, cross-references used correctly.</p>
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The assessment panel and process

Assessments are evidenced-based – on the index submitted and against published criteria. The assessors look for conformance with standard indexing conventions (as learned in training, or on-the-job, and as set out in the standards and textbooks on indexing), demonstrated ability in subject analysis (detail as well as broad concepts), and comprehensiveness, accuracy and clarity. The index must be all the applicant's own work.

Applications are confidential, with only the Receiving Officer knowing the identity of applicants. At least two assessors review each book and its index. If assessors disagree on whether the index satisfies the criteria, a third independent assessment will be made by another member of the Board.

When an application is received the Receiving Officer Accreditation ascertains which Board members are available to assess the book ('the Panel') and posts the book with any background information provided by the applicant to the first assessor. After the first assessor has written a report the book and report is returned to the Receiving Officer, who forwards the book to the second assessor for an independent assessment.

Subject matter of the text, if very specialised, may influence the choice of assessors or require a subject expert to be co-opted to the Panel.

Background information provided by the indexer often includes:

- instructions from the publisher on length, style or layout of the index
- decisions made by the indexer on form of entry, or arrangement, or language of main entry (for example, if the text contains both scientific and common names, or foreign terminology)
- constraints which had an impact on the level of detail or comprehensiveness of the index.

Each assessor reads the book, or sample sections of it. They check to see how the sampled sections are handled in the index. Naturally they check to see that the detail of subjects, names and special terminology is dealt with appropriately in the index. They evaluate how well significant concepts and broad subject matter—as identified in chapter, section and subsection headings—are analysed and presented in the index, how like information which is scattered throughout the book is gathered together in the index, and how well the reference structure serves the reader.

They look through the index, to identify obvious good points and shortcomings and features they might want to check. They sample the index, by selecting entries and going to the nominated pages to identify the subject/name and read the surrounding text to determine the accuracy and appropriateness of the sampled entries.

The reading and sampling process is time consuming but it enables the assessor to judge the effectiveness of subject analysis, the level of comprehensiveness, and the appropriateness of the language of the index and its cross-referencing, against the criteria (Table 3), particularly the four-part criterion 1.

Criteria 2 and 3 are relatively straightforward to assess. If italics or bold or symbols are used, has the indexer explained the meaning or left the reader to guess? Accuracy of page numbers is assessed by the two-way sampling process described above. Spelling accuracy is assessed by reading the index. Cross-references are followed to ensure they are accurate and not 'dead-end' nor circular.

In summary, The Panel is looking for demonstration of the indexer's ability to deal with continuous and discontinuous discussion, analysis of subject matter and knowledge of indexing conventions and contemporary practice.

An index **will not fail** assessment if it contains a few minor examples of poor editing whilst otherwise demonstrating a good grasp of indexing practice – in this case the assessors' report would indicate the editing flaws, suggest how they could be amended, and accept the index.

An index **will fail** assessment if it demonstrates lack of knowledge of indexing practice and conventions, and/or includes systematic errors.

What does the applicant get?

Every applicant gets a report from the Chair of the Board with comments set out against the evaluation criteria. Successful applicants' reports are usually brief, with comments about the good features of the index in the context of the criteria, and sometimes including suggestions from Panel members about alternative approaches. Panel members are not named in the report.

Reports to unsuccessful candidates are longer (averaging 5–6 pages in length), for these reasons:

- good points are acknowledged
- evidence of shortcomings is carefully documented in support of the final recommendation
- Panel members usually include constructive feedback, under each selection criterion, on how the index might have been improved to meet assessment criteria and conform with standard indexing practices and conventions. Such suggestions may assist the indexer to improve analysis and editing in future indexing projects.

Applications are not rejected lightly – whilst panel members are objective in their assessments, they would in general prefer applicants to pass. Applicants are often invited to re-submit another index after 6 months has elapsed, and are offered the opportunity to discuss the index with a panel member. Sometimes the advice is to attend a training course or to seek mentoring or peer review. Some applicants have accepted the opportunity to discuss the index with a panel member, but most don't – perhaps because they do not wish to breach anonymity.

Improving practice – common shortcomings and traps

Analysis of comments in Accreditation reports and discussion with present and past members of the Board of Assessors and trainers revealed that the most common shortcomings seen in indexes are poor subject analysis, poor choice of headings, over-classification, failure to gather like concepts, and undifferentiated locators. These are traps for beginning and inexperienced indexers.

Sometimes shortcomings are the result of poor editing; otherwise they indicate lack of familiarity with basic indexing practices and conventions.

Good practice to which new indexers and applicants should pay attention include:

- consistency and accuracy in choice of main headings
 - use nouns or noun phrases instead of adjectives alone
 - use plural nouns for things/objects, single nouns for abstract concepts
 - be wary of inversion – don't over-invert, use common sense and cross-references if necessary, or use 'direct order' and the 'ignore in sorting' feature in indexing software to sort on words other than the initial one
- subject analysis:
 - include general concepts as well as the specific topics in the text. For example, include broad concepts for which chapter headings and sub-headings are clues which indicate the weight given to the topic by the author
 - gather like concepts – control synonyms and use appropriate cross-referencing
 - avoid over-classification (sometimes called 'library classified entries')
 - deal lightly with the metatopic
 - be careful with levels of subheadings – be mindful of how many are practical or usable. In general, a long list of subheadings, spanning columns or pages, makes navigation difficult and subject matter hard to find. If possible, break-out the subject matter to main headings
 - be succinct but not cryptic in choice of subheadings
 - structure the index for best access to the text – try not to replicate contents page structure in index headings/subheadings.
- accurate double-posting – make sure locators are the same at each entry of a double-posted concept
- accurate cross-references – not circular nor pointing to non-existent entries
- undifferentiated locators. How many is too many? – usually more than 5 to 7 is too many, though it does depend on the particular book, of course. Create subheadings to break-down the subject matter
- differentiated locators – don't over-analyse single pages.

These are fundamental principles of indexing, reflected in the Criteria for Accreditation and covered in Society training courses and in standard texts such as Browne and Jerney (2007), Booth (2001) and Mulvany (2005).⁷

Practical advice for improving indexes and achieving Accreditation

My tips to help in the achievement of Accreditation:

- attend training courses and professional development events
- consult the standard textbooks (you'll need a core collection if you intend to work as an indexer) and in practising pay attention to the basic principles of indexing
- work through the exercises in *The Indexing Companion Workbook; book indexing* (Browne 2009)
- practise, practise, practise indexing, perhaps in collaborative or volunteer projects
- network, talk to other indexers
- when you are new to indexing, find an approachable, knowledgeable colleague to be your mentor, with whom to discuss your indexes. If you don't know anyone, ask your branch committee for suggestions or ask via the *Newsletter*
- read indexes, especially the award-winning ones. The indexing societies list these on their websites.⁸ Also, many indexes are now viewable on publisher websites
- complete a few indexes before you apply, so you've had a chance to encounter some of the traps of indexing and develop judgement and strategies to deal with them.

If these strategies are followed for two to three years before applying for Accreditation, then chances of success are likely to be high.

Conclusion

ANZSI's Accreditation process has benefits for the Society and for individual indexers. The Society is small and dependent on volunteers so its current Accreditation process, though seeking to be as objective as possible, remains relatively simple. The discussion of traps for inexperienced indexers and tips on improving indexes encourage non-Accredited indexers to practise, reflect on their work and to pursue the achievement of Accreditation.

Acknowledgments

In preparing this paper I've consulted the readily-available records of the Registration Committee/Board of Assessors, maintained by the Receiving Officer— Accreditation (Shirley Campbell), for information about aspects of indexing that need attention in training, professional development and reflective practice. I'm grateful to current and former members of the Registration Committee and Board of Assessors—Michael Harrington, Jean Norman, Barry Howarth, Frances Paterson, Tordis Flath, Tricia Waters and Shirley Campbell and the Society's principal trainers (Glenda Browne and Max McMaster)—for discussing with me their experiences in assessing indexes and sharing their views on commonly-exhibited shortcomings in indexes.

⁷ See the 'Indexing resources' area of the ANZSI website: http://www.anzsi.org/site/indexing_resources.asp

⁸ For example, see the ANZSI Medal Winners page: http://www.anzsi.org/site/medal_win.asp

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Note: The presentation of this paper at the conference incorporated a practical workshop session in which a sample index with shortcomings was assessed and discussed. That material is in the presentation file that accompanies this paper, available at:
<http://www.anzsi.org/site/2013Confpap.asp>

Indexing tips and traps

Practical approaches to improving indexes and achieving accreditation

Sherrey Quinn

Chair, ANZSI Board of Assessors

Objectives:

- Demystify ANZSI Accreditation process
- 'Traps': indexing issues identified by the Board of Assessors
- Practical exercise and discussion
- Questions
- Encourage successful applications
- Tips for achieving Accreditation

Background

ANZSI Accreditation (formerly Registration):

- established in late 1970s
- modelled on SI scheme which aimed 'to provide a list of people competent in indexing'
- since then discussed in context of education, professional development and membership categories
 - disparate points of view
 - scheme revised now and then, reviewed at least twice,
...

Purpose

- a credentialing standard for back-of-book style indexers
- recognises quality of indexing work
- acknowledges professionalism of an indexer through its requirement that only published indexes are reviewed
- assures potential clients that an Accredited Indexer has met established criteria for acceptable indexing

Benefits for ANZSI

- objective measure of competence because of assessment against published criteria
- benchmark for editors and publishers
- contributes to the image of ANZSI as a professional body and the credibility of indexers as skilled professionals
- is in line with contemporary initiatives in similar organisations

Benefits for members

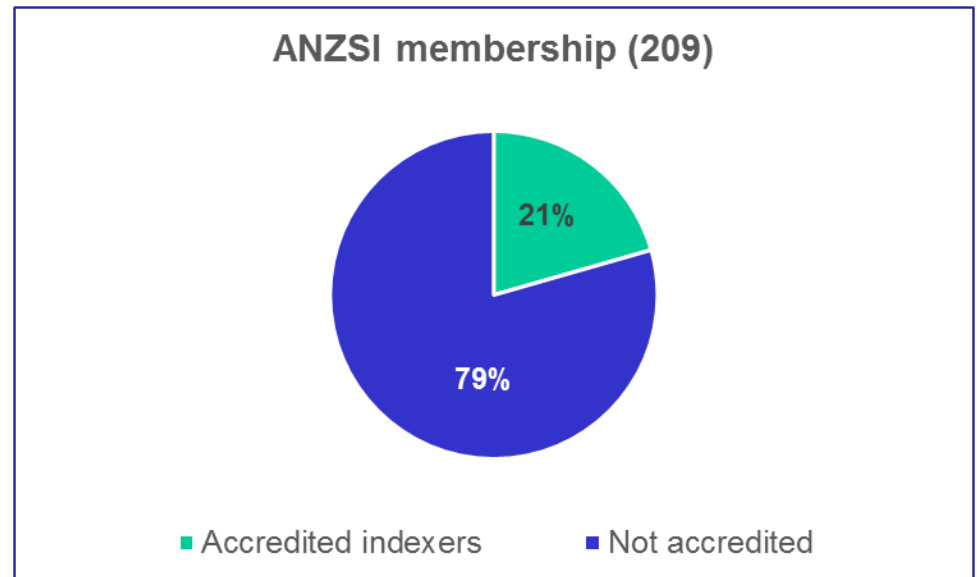
- indicates an indexer's ability to work under marketplace conditions and constraints
- recognition of expertise
- builds self-confidence
- helps indexers when marketing and tendering
- indicates interest in professional development and ongoing improvement

However:

Not all competent, or indeed expert, indexers are 'Accredited', nor wish to be.

It's a personal choice.

Note: Not all members of ANZSI are practising indexers, nor full-time indexers.



Current situation

- Terminology change late 2012 from 'Registration to 'Accreditation'
- Revised policy agreed at recent Council meeting (early 2013)
- Renewal of Accreditation - on hold since 2011, still under consideration by Council
- Covers back-of-book style indexers, not yet database indexers

Myths:

Renewal of Accreditation:

- *requires re-assessment of an index*
 - NO, IT DOESN'T
- *the process is cumbersome and time-consuming*
 - NO, IT ISN'T

Reality:

- Give ANZSI the bibliographic details of two (2) of your indexes published in the last 5 years, or equivalent evidence of continuing work in indexing

No assessment is involved

Assessment - What happens?

- Board of Assessors: 5 members, plus Receiving Officer
- Each index assessed by a Panel of at least 2 assessors
- Each writes a report against the criteria and makes a recommendation for or against granting Accreditation
- A report on the assessment is sent to the indexer; if the criteria have not been satisfied, the report includes constructive comments and helpful suggestions
- Anonymity is preserved

Accreditation requirements

- Indexes submitted must:
 - deal with subject matter complex enough to require more than one level of index heading
 - be substantial in size
 - be published by a commercial, academic or scholarly publisher or outside agency (not self-published)

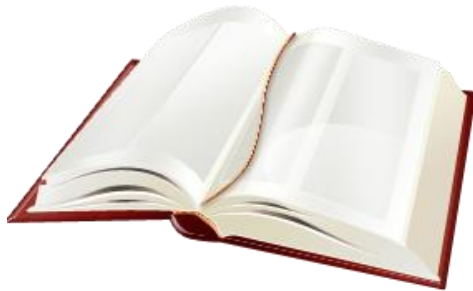
Accreditation criteria:

- Identification of relevant material
 - Analysis, description, comprehensiveness, arrangement
- Style
 - Explanation included for unusual features or conventions
- Processing
 - Accurate spelling, page references, cross-references

That is, assessment is based on the **fundamental principles and conventions** of back-of-book indexing.

What do assessors do?

1. Read sample sections,



check the index.

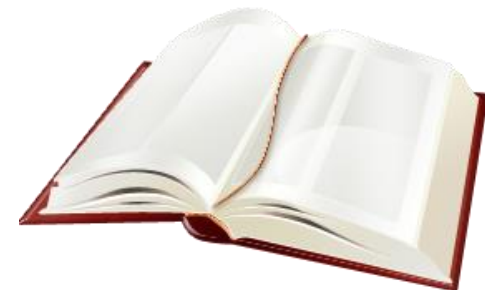
Index	
A Adams, Lancelot William, 30 Adams, Michael, 14 administration buildings <i>see</i> civic buildings; town halls Aird Street, Parramatta, 45 aldermen become Councillors, 86 deaths (1936), 13 election procedures, 10 first female alderman, 7 local politics, 2–7 longest serving, 6–7 Mayors <i>see</i> Mayors and Lord Mayors shortest serving, 6 simultaneous service, 12–13 aldermen, by Council Dundas, 5, 6, 12, 71–72 Ermington and Rydalmere, 10, 11, 12–13, 39, 73–74 Granville, 6, 11, 14, 35, 67–70 Parramatta (to 1948), 6–7, 11–15, 40–41, 47, 63–66 Parramatta City (from 1948), 6, 57, 74–78 West Maitland, 4 Alfred Square, Parramatta, 31, 32, 40 Anderson, Dr Mathew, 81 Anderson, Matthew, 56, 81 Anzac Corps, 39 architects and architecture, 15, 16, 17, 18, 33, 34, 38 archives, 35 art galleries, 19 Australian Imperial Force, 40, 41 Australian Labor Party, 14 Australian War Memorial, Canberra, 39 Aveling and Porter Steam Roller, 47	Blacktown Shire, 83 Boer War, 37 Bold Street Bridge, Granville, 46 Booth, George, 26, 27 Borger, David, 45, 51 bridges, 23, 44, 45, 46 Broken Hill, 12–13 Brown, Edwin John, 47 Brush Farm Nursery, 7, 8 Buckland and Druce (architects), 18, 50 building inspection, 26 buildings, 15–19, 53 Burns, Richard, 9 bus services, 43, 52 butchers, 28–29 butterfly (swimming stroke), 33 bypasses, 44 Bymes, Charles Joseph, 9, 10, 15, 51 Bymes, James, 2, 81 C Cahill, Joe, 18 Camellia area, 43, 45 cannons, 38 Carlingford, 5 carriage accidents, 29 cars, 47 <i>see also</i> roads Catacart Dam, 27 Cavill, Frederick, 33 Centennial Baths, 33, 36 central business district, Parramatta, 19 Central Cumberland electorate, 4 Chamber of Commerce, 40, 51, 56 Champion, Cecil Alexander Buckingham, 47 Charles Street ferry wharf, 43

2. Sample the index,

Index	
A Adams, Lancelot William, 30 Adams, Michael, 14 administration buildings <i>see</i> civic buildings; town halls Aird Street, Parramatta, 45 aldermen become Councillors, 86 deaths (1936), 13 election procedures, 10 first female alderman, 7 local politics, 2–7 longest serving, 6–7 Mayors <i>see</i> Mayors and Lord Mayors shortest serving, 6 simultaneous service, 12–13 aldermen, by Council Dundas, 5, 6, 12, 71–72 Ermington and Rydalmere, 10, 11, 12–13, 39, 73–74 Granville, 6, 11, 14, 35, 67–70 Parramatta (to 1948), 6–7, 11–15, 40–41, 47, 63–66 Parramatta City (from 1948), 6, 57, 74–78 West Maitland, 4 Alfred Square, Parramatta, 31, 32, 40 Anderson, Dr Mathew, 81 Anderson, Matthew, 56, 81 Anzac Corps, 39 architects and architecture, 15, 16, 17, 18, 33, 34, 38 archives, 35 art galleries, 19 Australian Imperial Force, 40, 41 Australian Labor Party, 14 Australian War Memorial, Canberra, 39 Aveling and Porter Steam Roller, 47	Blacktown Shire, 83 Boer War, 37 Bold Street Bridge, Granville, 46 Booth, George, 26, 27 Borger, David, 45, 51 bridges, 23, 44, 45, 46 Broken Hill, 12–13 Brown, Edwin John, 47 Brush Farm Nursery, 7, 8 Buckland and Druce (architects), 18, 50 building inspection, 26 buildings, 15–19, 53 Burns, Richard, 9 bus services, 43, 52 butchers, 28–29 butterfly (swimming stroke), 33 bypasses, 44 Bymes, Charles Joseph, 9, 10, 15, 51 Bymes, James, 2, 81 C Cahill, Joe, 18 Camellia area, 43, 45 cannons, 38 Carlingford, 5 carriage accidents, 29 cars, 47 <i>see also</i> roads Catacart Dam, 27 Cavill, Frederick, 33 Centennial Baths, 33, 36 central business district, Parramatta, 19 Central Cumberland electorate, 4 Chamber of Commerce, 40, 51, 56 Champion, Cecil Alexander Buckingham, 47 Charles Street ferry wharf, 43



check the text.



Review of applications and results since 2006

- 33% pass rate

What are the issues? ...

i. the structure of the fashion industry

Neither the glamorous image of the high end of the fashion system nor the ephemeral and derogatory connotations of so-called slaves to fashion reflect the full contours of the fashion business as an industry. Like many industries, it has complicated flows between constituent parts, and many subsectors that feed into the industry. Although interrelated, these components are unequal players in the fashion system in terms of contribution, **sustainability**, power, and prestige. Overall, the industry can be seen as a classic **supply chain** from the production of raw materials to the manufacture of garments to the retailing and consumption of finished products.

In this supply chain, there are four subsystems: a manufacturing system that produces the materials for and products of apparel manufacture; a creative system that designs the products, produces the merchandising and promotion, and underpins consumer tastes; a managerial system that organizes and controls the coordinated stages of sourcing, manufacturing, and distributing apparel; and a communication system that produces product information and advertising of apparel, which highlight salient attributes for consumers.

So, who are the players in this system? Following the chain, we can identify the **manufacturers**, who are also called vertical producers (Jenkyn Jones 2005). They undertake the production and purchase of materials; the commission or purchase of designs; and the manufacture, distribution, and retailing of apparel. While some manufacturers are large-scale factories, the fashion industry is distinctive in also involving **small and artisanal enterprises** such as **custom tailors**, **couture specialists**, and subcontracted finishers (such as embroiderers, buttonholers, and pleaters).

Equally important are the **wholesalers**, who commission the manufacturing process, often in small runs to contractors, who, in turn, subcontract the work to outfits (jobbers) that range from medium cut-make-and-trim firms to individual outworkers (who often work from home). **Contractors** arrange production, packaging, and delivery. Designers tend to produce a range of samples that are tested in the marketplace to determine the best sellers, which are then produced in greater numbers. Because this is a risky process, contractors seek "rolling contracts" with their suppliers to ensure steady work flow. A chosen sample is refined and "sealed" by a docket, which is a contract specifying the production details and run size. Each order is inspected, labeled, and certified

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Let's assess an index:

[Practical session – see Appendix]

Traps that less experienced indexers fall into:

- Poor subject analysis
 - Focus on words or fine detail while neglecting bigger concepts
 - Over-analysis or inconsistent degree of analysis
 - Headings with many undifferentiated locators
 - Headings with large undifferentiated spans
- Failure to gather like concepts
- Poor choice of entry terms, including adjectives alone as main headings
- Concepts as subheadings that could also/instead be main headings
- Classified-type entries
- Failure to double post or cross-reference
- Double posts with inconsistent page locators
- Cross-referencing errors (incomplete, circular, to non-existent terms, unnecessary)

Over 25% of indexers not yet 'Accredited'
plan to seek Accreditation
(2012 survey of members)

So, if you are not yet an Accredited Indexer,
... please consider applying

Tips for achieving Accreditation:

- complete a few indexes before you apply
- practise, practise, practise!
- consult the standard textbooks
- work through the exercises in *The Indexing Companion Workbook; book indexing* (Browne 2009)
- attend training courses & professional development events
- find an approachable, knowledgeable colleague to mentor you
- seek peer review of your work
- network, talk to other indexers
- read indexes, especially award-winning ones

- Questions?
- Discussion

Further information: sherrey@librariesalive.com.au

Appendix: Practical exercise

Road Safety Index sample

This is an exaggerated example of an index displaying common shortcomings. Identify the errors and correct them if you can.

- accidents
 - investigation, 60–3
 - prevention, 50–1
 - Research Centre, Monash University, 56
 - statistics, 73–5
- alcohol *see* blood alcohol testing
- B-doubles, 18
- bicycle accidents, 40–1
- bicycle helmets, 89
- blood alcohol testing, 29, 129, 161
- careless driving, 42–4
- cars, 20–6
- causes of accidents, 64–70
- crash barriers *see* guardrails
- crash injuries *see* injuries
- dangerous driving, 40–2
- deaths *see* fatality rate
- drink-driving, 30–2, 38–9
- driver
 - licensing, 25, 27–9
 - testing, 24
 - training, 23
- drivers, 13–20, 23, 24, 25, 27–9, 38–9, 40–4, 70–3, 90
- driving
 - behaviour, 13–20, 70–3, 90
 - while intoxicated, 30–2
- expressways *see* motorways
- fast cars, 14–15, 26
- fatality rate, 69, 73–5, 89
- freeways, 9, 12, 21–3
- government funding, 50–7
- heavy
 - traffic, 150–4
 - vehicles, 30
- injuries *see* crash injuries
- intoxication *see* alcohol
- land transport information services, 8–9
- Lay, Max, 1
- Lay, MG, 2–3
- level-crossing accidents, 55–7
- lights, traffic, 112
- Monash University Accident Research Centre *see* Accident Research Centre, Monash University
- motorcycle helmets, 75–6
- motorways, 8, 17
- new initiatives (research), 160–3
- pedestrian
 - accidents, 43
 - behaviour, 120, 122–8, 140
 - crossings, 34–6, 51–2, 60
 - lights, 51, 53, 60
- research
 - roads, 8–9
 - vehicles, 9–10
- road safety information services, 7–8, 91–2
- roads
 - construction, 50–60
 - funding, 50–7
 - jurisdiction, 61–2
- safety devices, 88–9, 112
 - airbags, 89
 - child restraints, 89
 - helmets, 89
 - ignition locks, 88
 - seat belts, 89
- Source book for Australian roads* (Lay), 5
- traffic
 - density, 143, 148, 150–6
 - in urban areas, 143, 148
- Transportation Research Board (TRB), 135
- TRB *see* Transportation Research Board
- truck accidents, 58–9
- vehicles, 12–17, 20–6, 30–3, 50–7, 154–6, 160–80
 - bicycles, 10
 - capacity, 13, 15
 - cars, 12–17
 - four-wheel drives, 12, 13–14
 - heavy, 30
 - motorcycles, 12–13, 55–7
 - semi-trailers, 31–3
 - trucks, 18, 25, 30

Entries with errors/shortcomings

Poor choice of entry term

fast cars, new initiatives, causes of accidents

lights, traffic – *unnecessary inversion*

‘Research Centre, Monash University’ under ‘accidents’ – *its correct name is ‘Accident Research Centre, Monash University*

driver, heavy, pedestrian – *adjectives alone are not correct main headings, use nouns or nouns phrases instead*

Poor subject analysis

government funding – *for what : road construction, safety, driver training?*

drivers – *long string of undifferentiated locators, should be sub-divided*

vehicles – *long undifferentiated span (160–80), should be subdivided*

Over-analysis

safety devices – *five subheadings under ‘safety devices’ for the same two pages – break out these out under specific main headings*

Failure to gather

various ‘driver/drivers/driving’ terms, ‘truck’ terms, ‘helmet’ terms, ‘car’ terms

Lay, Max/Lay, MG – *same person (check with editor if in doubt)*

land transport information services/ road safety information services – *for this index (given the metatopic) could gather under ‘information services’*

Failure to double post or cross-reference

drink-driving – *double post as subheading under ‘driving’*

research – roads – *double post under ‘roads – research’*

‘Source book for Australian roads (Lay)’ – *double post under ‘Lay’*

Double posts with inconsistent locators

accidents/ level-crossing accidents/pedestrian accidents/truck accidents/bicycle accidents

drink-driving/driving while intoxicated

Classified-type entries

vehicles – *the types of vehicles under ‘vehicles’ could be broken-out for double posting as main headings*

Subheadings that could be main headings

Subheadings under ‘safety devices’ – *break out to main headings*

Cross-referencing errors

Incomplete: ‘alcohol see bold alcohol testing’ – *could have had additional cross-reference ‘see drink-driving’*

Cross-references to non-existent terms: crash barriers see guardrails

Circular or poorly chosen cross-references: crash injuries see injuries/injuries see crash in juries;
expressways see motorways/motorways see freeways; intoxication see alcohol (*should be ‘intoxication see blood alcohol testing; drink-driving’*)

Unnecessary cross-reference: TRB see Transportation Research Board – *they file very close together.*

See also comments in following marked-up index.

Road Safety Index sample extract

This is an exaggerated example of an index displaying common shortcomings. Suggested corrections are shown below – remember that different indexers may have different approaches.

See also notes on previous page.

Accident Research Centre, Monash University, 56

accidents

bicycle accidents, 40–1

causes, 64–70

investigation, 60–3

at level-crossings, 55–7

involving pedestrians, 43

prevention, 50–1

~~Research Centre, Monash University, 56~~

statistics, 69, 73–5, 89

truck accidents, 58–9

airbags, 89

alcohol see blood alcohol testing; ~~drink-driving~~

B-doubles (trucks), 18

bicycle accidents, 40–1

bicycle helmets, 89

bicycles, 10

blood alcohol testing, 29, 129, 161

careless driving, 42–4

cars, 12–17, 20–6

fast cars, 14–15, 26

four-wheel drives, 12, 13–14

ignition locks, 88

~~causes of accidents, 64–70~~

child restraints, 89

~~crash barriers see guardrails~~

~~crash injuries see injuries~~

dangerous driving, 40–2

deaths see fatality rate

drink-driving, 30–2, 38–9

~~driver~~

~~licensing, 25, 27–9~~

~~testing, 24~~

~~training, 23~~

~~drivers, 13–20, 23, 24, 25, 27–9, 38–9, 40–4, 70–3, 90~~

behaviour, 13–20, 70–3, 90

intoxicated, 30–2, 38–9

licensing, 25, 27–9

testing, 24

training, 23

driving

~~behaviour, 13–20, 56, 70–3, 90~~

careless, 42–4

dangerous, 40–2

~~while intoxicated~~ drink-driving, 30–2, 38–9

expressways see ~~motorways~~ freeways

fast cars, 14–15, 26

fatality rate, 69, 73–5, 89

four-wheel drive vehicles, 12, 13–14

freeways, 8, 9, 12, 17, 21–3

government funding for roads, 50–7

heavy

~~traffic, 150–4~~

~~vehicles, 30~~

heavy vehicles see trucks

helmets, 75–6, 89

ignition locks, 88

information services, 7–9, 91–2

~~injuries see crash injuries~~

intoxication see ~~alcohol~~ blood-alcohol testing; drink-driving

~~land transport information services, 8–9~~

Lay, Max, 1, 2–3

~~Source book for Australian roads, 5~~

~~Lay, M, 1~~

level-crossing accidents, 55–7

~~lights, traffic, 112~~

Monash University Accident Research Centre ~~see Accident~~

~~Research Centre, Monash University, 56~~

motorcycle helmets, 75–6

motorcycles, 12–13, 55–7

motorways, 8, 17 ~~see freeways~~

~~new initiatives (research), 160–3~~

pedestrians

accidents involving, 43

behaviour, 120, 122–8, 140

~~crossings, 34–6, 51–2, 60~~

~~lights, 51, 52, 60~~

pedestrian crossings, 34–6, 51–2, 60

research

new initiatives, 160–3

roads, 8–9

vehicles, 9–10

~~road safety information services, 7–8, 91–2~~

roads

construction, 50–60

funding, 50–7

jurisdiction, 61–2

research, 8–9

Comment [S4]: ‘heavy – traffic’ locators moved to ‘traffic – density’

Comment [S5]: Gathered under ‘information services’

Comment [S1]: ‘Cars’ – could analyse ‘20–6’ into subheadings

Comment [S6]: lights, traffic – Unnecessary inversion

Comment [S7]: Single locator, so double-post rather than cross-reference

Comment [S2]: ‘driver’ – should be plural.

Comment [S3]: Drivers/driving terms analysed to avoid long string of undifferentiated locators

Comment [S8]: Gathered under ‘information services’

Road Safety Index sample extract

safety devices, 88–9, 112

~~airbags, 89~~

~~child restraints, 89~~

~~helmets, 89~~

~~ignition locks, 88~~

~~seat belts, 89~~

seat belts, 89

semi-trailers *see* trucks

Source book for Australian roads (Lay), 5

statistics (accidents), 69, 73–5, 89

traffic

density, 143, 148, 150–6

in urban areas, 143, 148

traffic lights, 112

Transportation Research Board (TRB), 135

~~TRB *see* Transportation Research Board~~

truck accidents, 58–9

trucks, 18, 25, 30–3

vehicles, ~~12–17, 20–6, 30–3, 50–7, 154–6, 160–80~~

bicycles, 10

capacity, 13, 15

cars, 12–17, 20–6

four-wheel drives, 12, 13–14

~~heavy, 30~~

motorcycles, 12–13, 55–7

research, 9–10

~~semi-trailers, 31–3~~

safety devices, 88–9, 112

trucks, 18, 25, 30–3

Comment [S10]: vehicles – subdivide the undifferentiated locators further into subheadings. Suggested additional subheadings for this topic might include: inspection
maintenance
regulation
etc.

Comment [S11]: vehicles – break out types of vehicles ('classified entries') to also be main headings:
bicycles
cars
motorcycles
trucks

Comment [S9]: *Source book ...* – double post under author

Converting a Legacy Print Book to an EPUB with Pinpoint Index Linking

In the electronic realm, page numbers lose their meaning. What is a page? It can vary depending on the way you choose to display the material on your eReader based on the font and type size. The index locators for page 10 have no unique meaning for two viewers of the same eBook.

A really simple solution is that eBooks should be linked not to pages but to more specific points within the text. New tools are likely to be developed to assist publishers with accomplishing this for new publications. But how can this be accomplished for already published books? This article will talk about a real-life project involving such a scenario and describe the workflow and software involved, and the pitfalls and unexpected issues that arose.

Getting Started

The starting point of the process was easy enough. The publisher sent the PDF file used to print the book for conversion. Off it went to a conversion service which returned an eBook. (There are two major file formats for eBooks: MOBI which is used on Amazon Kindles and EPUB¹ which is used on most other eReaders. This article describes work that was done on an EPUB file.)

Both the PDF and EPUB indexes have page numbers. During the creation of the EPUB, the conversion service inserted anchors for each page. The page break anchors are something you cannot see on the screen, but they are in the coding allowing the locators to link to page breaks from the Table of Contents or the Index.

Before going further, it is worth mentioning that an EPUB is meant to be a dynamically reflowable document because it can be viewed on an eReader (e.g., Nook), on a PC or Mac (using software, e.g., Calibre²), on a tablet (e.g., iPad), or even on a mobile phone. It is not meant to be an exact replica of the book's layout.³ In addition, it can have totally new content including rich media (audio, video). This discussion, however, is confined to conversion of legacy publications, not new books or new features.

The reflowable quality does affect some conversion results though. In this converted book, the dot leadering was not kept in the Table of Contents. The page numbers were just one space away from the text (chapter heading, for example) to which they applied. These small imperfections in conversion can lead to user confusion, especially if the chapter heading ends with a number as well. A Table of Contents example of this would be:

The Top 10 24

As an Index entry, it is much clearer when a comma is used as a separator:

The Top 10, 24

There are many other quirks like this that introduce problems in conversions, but we will only focus on the index processing.

Changing the Links in the Index

First, the index had to be available in indexing software to allow the addition of the pinpoint⁴ IDs. Since the print book indexer was not the same indexer adding the IDs, the index from the PDF file was converted so it could be imported into CINDEK software to accomplish this step.⁵

Next the indexer adding the IDs needs to know what they are! Since conversions to EPUB do not provide pinpoint IDs of any nature, a new tool was needed. Leverage Technologies has created such a tool, let's call it EAI⁶, to do this. It also was used for a couple of other processing steps discussed later on. This first step read the EPUB and created an intermediate or indexer version of the EPUB. The page break anchors were made visible when reading the EPUB to assist the indexer. For every paragraph, heading, list item, etc., EAI added a pinpoint ID and made it visible. In other words, a unique identifier was added to every chunk of text, whether a chapter title, subchapter title, box, paragraph, figure, or table.

This intermediate EPUB version was delivered to the indexer so that it could be used to walk through the book while also walking through the index in page order. The indexer identified the point on the page, say a paragraph, that was a more specific point than the page break to link to and added that ID to the page number. Let's say that the term iPads was mentioned in chapter 2 on page 37 and that page had 5 paragraphs with pinpoint IDs of 2.23, 2.24, 2.25, 2.26, and 2.27. The indexer determined that iPads were specifically discussed in the paragraph with ID 2.26. So the ID 2.26 was added to the locator field using the vertical bar as a separator to page number 37. This produced the new locator 37|2.26. [A different character other than vertical bar could have been used.] This process was repeated for each page number. When the index was completed, the indexer ensured that every entry (that was not a cross-reference entry), contained a locator of the form #|#. At this point the index was returned to Leverage Technologies.

The index was exported from CINDEK into the tagged format ready for HTML/Prep⁷ to process. Before running HTML/Prep though, the exported file was run through step two of the EAI tool. This procedure transformed the locators, such as 37|2.26, into a form that contained the page number and a URL that would work within the EPUB. In our example, ID 2.26 was mapped to the EPUB filename for that chapter and the pinpoint ID in a format too arcane to show for our purposes here.

Now HTML/Prep was run on the transformed file with the mapped IDs which created the new XHTML index file for the EPUB. HTML/Prep also linked the cross-references. (These were not linked during the conversion of the PDF file.) Of course any cross-references that didn't link were reported (for example, if they were not an exact match or if they were generic), and decisions were made about changing the index to allow them to link.

One last time the EAI tool was run (step 3) which accomplished several things:

- Removal of the visible page break IDs and the visible pinpoint IDs;
- Replacement of the page-break-linked index file with pinpoint-linked index; and
- Addition of index style definitions to the CSS style sheet to match those HTML/Prep generated.

Finally we had the final EPUB, and it was time to review the result and test it. This was done using Calibre since viewing this on the computer was quicker and easier than sending it to a physical eReader device. Not all eReaders or reading software act the same! Bet you are not surprised to read that. Similar to how a web page may display differently in different browsers which work on HTML or XHTML, so too there are display discrepancies that can occur on different reading systems. For instance, the resulting index looked fine using Calibre but didn't format properly in another reading software Cool Reader. Another difference occurred when the reviewer jumped to the target by clicking on a link. Calibre showed the target paragraph at the top of a window that was sized similar to that of an eBook screen. When maximized to the full size of the computer screen, after clicking the link, the target paragraph appeared in frame but was no longer the top paragraph.

What Went Awry

While many issues arose during the initial run through, i.e., errors reported by the software, and were resolved as we went along, other issues only became apparent at the review stage. Once these were addressed, the processing cycle steps were repeated until we had the final "good" EPUB.

- *Roman numerals:* The original book indexer had worked from first-pass pages in a PDF file which had numbered front matter pages with small roman numerals. After turning the index in, the publisher added two pages to the front matter and, of course, renumbered the front matter pages, but neglected to adjust the corresponding locators in the index which ended up being off by two (or as the Romans would have said *ii*). This was discovered during the page number mapping process. These page numbers had to be adjusted.
- *PDF index conversion:* While the text data was converted with full fidelity, style settings were lost so italics needed to be restored for headings that were book titles and such.
- *eBook indexer changes:* The indexer adding the pinpoint IDs (not the original book indexer) came across situations where the concept embodied by the entry could not be found on the referenced page. There seemed to be nothing else to do but to delete these entries. Maybe these were caused by a typo in the page number, but without fully re-indexing the book from scratch they could not be easily found. There were also passing mentions indexed on one page where the meat of the discussion was on the next page. Pinpoint IDs were used that reflected the entrée not the appetizer.

At last, we had the EPUB ready to deliver back to the publisher who would provide it for download when sales were made. Throughout, this discussion has focused on an eBook in EPUB format which can be read by the Nook and other devices. MOBI is the format used by Kindles. At this point converting the EPUB to MOBI would be the best way to create an analog MOBI file. EPUB is an open standard and well defined. MOBI is not and currently the EAI tool doesn't work on MOBI files.

Summary

A lot was learned during this first EPUB index relinking project. Most important was that this is not a *push the button* workflow scenario yet. A lot of review had to take place at each step during the process and fixing errors that were reported along the way. The second indexer was faced with the philosophical

dilemma: either maintain the fidelity of the book index in the face of errors and typos, or improve the index for the eBook. And even then, the question arises whether making such changes constitutes a copyright violation? Fortunately, the publisher owned the copyright in our case.

The book in question had very simple page numbers without additional notations like 't' and 'f' for tables and figures. So how this process would work when a box, figure, table, or footnote is indicated needs to be analyzed for future projects. Similarly an index citing section numbers or legal citations may also present issues not encountered in this project.

Nonetheless, the issues I have raised here on relinking the index and what to watch out for should provide some guidance to both programmers and indexers for the future.

¹ This is basically a zip file with the text of the book represented in XHTML. There are other files contained in the zip file but not pertinent to the discussion in this article. See <http://idpf.org>.

² One of the many eReader software available for PCs or Macs. <http://calibre-ebook.com>

³ There are books that will remain in their print format because the layout is critical or the design is part of the allure: art books, comic books/manga, cookbooks, etc.

⁴ The term pinpoint will generally be used to mean any specific target. It most often will be a paragraph but could also be a list item, table row or cell, footnote, figure/illustration, etc.

⁵ Conversion services are available from Indexing Research, Leverage Technologies, and there are some third-party tools that may work as well.

⁶ The tool doesn't yet have an official name. For now it is still in development and undergoing alpha testing.

⁷ <http://www.levtechinc.com/publishing-indexing-products/utilities/html-prep.asp> can create HTML and XHTML forms of indexes from CINDEX or Sky Index.

Introduction

From childhood I have loved series novels, such as Anne of Green Gables and the Narnia books. As I grew older, the Peter Wimsey and Spenser mysteries and the Bujold science-fiction saga of Miles Vorkosigan became some of my top favorite novels. Discovering a new novel that continues a series is one of the keenest pleasures in my life.

But anyone who reads series fiction knows how difficult it is to keep track of what events occurred in which book. You recall an incident, but you don't know which of six, eight, or ten novels to pick up. In what book did Anne meet Susan Baker? When did Peter first propose to Harriet Vane?

To keep it all straight, the reader needs an index.

Hazel K. Bell, who has written several fascinating articles about the indexing of fiction, presented a paper to the Society of Indexers in 1992, which was later published in *The Indexer*. The very title asks the question, "Should fiction be indexed?" Bell writes, "Indeed, indexes to fiction are rarely produced, not generally demanded, and often assumed to be unnecessary or unimportant." Bell herself has indexed some of A. S. Byatt's novels, which I'm certain would aid scholars of Byatt's works and illuminate the novels for a more casual reader. Bell quoted Hans Wellisch as saying, "*Don Quixote, War and Peace, Gone with the Wind*, to name only a few mighty tomes with dozens or even hundreds of characters, places and events, lack indexes. . . many readers. . . may wish to return to a passage in which a certain character appears, but find it difficult to do so for want of an index."

I believe that lovers of popular series fiction need indexes as much as a scholar studying one multi-layered novel. So I can only say that I was excited when David K. Ream came up with the idea of indexing Les Roberts' mystery novels and asked me if I was interested in taking on the project.

Dave and I have worked together for many years. I was hired by Banks-Baldwin Law Publishing Company in 1980 and trained as a legal indexer. Dave had written the mainframe indexing programs that my company still uses today, and we call him when the programs need tweaking. He knew that I had an interest in indexing fiction, although it was something I had never done before.

Why would a computer consultant want his own index? Dave owns a company, Leverage Technologies. He is also associated with Indexing Research as the corporate/government partner for Indexing Research's Cindex software products. He sells a number of utilities which add certain checking or processing features to Cindex-produced files. In 1997, he decided that it would be beneficial to have his own index that he could use to demonstrate his programs to potential clients. Cindex is sold to all kinds of indexers — medical, legal, scientific, scholarly, etc. Rather than favoring one type, Dave thought he would do something different and have an index to fiction created.

Dave first considered a mystery series that was one of his favorites—the Archy McNally books by Lawrence Sanders. Although he wanted only to create a secondary research aid to the novels, Dave checked with his attorney and was advised to get permission from the publisher or author. A letter to the publisher went unanswered. So Dave turned to a Cleveland friend, an author in his own right and a past-president of the Mystery Writers of America. He asked Les Roberts for Lawrence Sanders' home address.

"Lawrence Sanders? He's dead," Les replied.

So Dave decided to find another series to index. And as it turned out, the second thought was the better one.

Les Roberts was the author of a popular and continuing mystery series, and he readily gave permission for his books to be indexed. Better yet, the series hero is a born-and-bred Clevelander and the series is set in Cleveland, Ohio—the hometown of Dave and myself, and the location of Leverage Technologies.

Dave and I had to come to an agreement on the scope of the series. There were nine books when I began indexing (and a tenth has recently been published). Dave wanted to keep the index to a manageable size, particularly when we decided that he would pay me by the entry. We decided to aim for about 2000 entries. To keep within this limit, we decided to index only the seven books which were currently available in print.

The books are written in first person, told by private investigator Milan Jacovich, a divorced man with two sons who live with their mother. Over the course of the series, Milan has several different close women friends, but their presence is only occasionally important to the plot. His best friend is a Cleveland police lieutenant, who is sometimes useful in his investigations—almost as useful as his uneasy relationship with two members of the Cleveland mafia. Milan is doggedly persistent in his work and unafraid of various menacing tough guys who try to persuade him to stop his investigations. Author Roberts has avoided the “hard-boiled detective” stereotype by making Milan a sensitive man who enjoys reading. The novels contain many references to books, music, and movies.

Deciding exactly what to index and how to organize the index was complicated.

Organization of the index

Dave and I decided to cite each book by a two-letter abbreviation of its title; e.g., PP for *Pepper Pike*, DS for *Deep Shaker*, SC for *A Shoot in Cleveland*. Fortunately, no two of the titles had duplicate initials.

Deciding how to organize the index was a major challenge. Working in law for almost twenty years, I originally thought in terms of subheadings beginning with key words in alphabetical order. I indexed the first book of the series, *Pepper Pike*, and gave Dave a copy. He zeroed in on the heading for Richard Amber, the murder victim:

Amber, Richard
found, PP 168-70
...intervening entries...
missing, PP 15-20

Dave asked, “How can he be found before he’s missing?”

I did some research and found that the rule for people’s lives is “born—married—died,” (event order), not “born—died—married” (alphabetical order). The subheadings for characters had to be re-cast in event order.

I use Cindex as my indexing software. To make the index sort alphabetically by heading but in event order for subheadings, I forced the alphabetical arrangement by assigning alphabetical letters to each subheading.

Amber, Richard

{a}missing, PP 15-20
{b}, {c}...intervening entries...
{d}found, PP 168-70

In Cindex, characters in braces denote alternate sort sequencing that will be seen only in draft format. I also used alternate sort sequencing before the page abbreviations so that when two books mentioned the same thing, the page cites would be in published book order rather than alphabetical order by acronym, for instance:

Renee (clerk in City Hall Records Room), PP 150; FC 62; CB 231

Dave also requested that I keep entries to two line levels: heading and first subheading, for ease of use when the index was put online. The only exception to this was the heading for Milan himself. I decided to organize the index by writing entries for scenes, characters, place names, etc. Whether or not to create entries at the point-of-view character was a question. I decided to exclude all action-type scene mentions and instead just create the entries around various aspects of Milan's life. Subheadings under his name consist of terms such as "appearance" and "apartment." I also picked up "doodling gallows," one of his recurring habits mentioned in almost every book. Although Milan claims to have been doodling gallows all his life, I couldn't help but think that it was apropos for a private investigator...and perhaps somewhat akin to the half-guilty reactions suffered by Lord Peter Wimsey after successfully apprehending a murderer.

Other subheadings that I created under the heading for Milan himself were "name mispronounced" and "name pronounced correctly." The mispronunciation of Milan's first and last names is a constant theme throughout the books. People who pronounce the name correctly are more likely to be characters that the author, or Milan, approves of.

What Was Indexed

Characters: I decided that every named character would become an index entry. I even picked up some "passing mentions," such as when Milan names several people that have been friends of his since high school. I wrote the entry to reflect the casual mention: "Alex Cerne, mentioned as friend of Milan, PP 49." When this character appeared in a scene three books later, I was glad to have indexed the passing mention.

Characters' names were sometimes a problem. Milan's best friend is police lieutenant Marko Meglich. Milan knows that Marko wishes to be called by the more Anglicized name of "Mark." Sometimes Milan calls him "Mark," particularly if he needs a police favor. Other times he calls him "Marko" to needle him. I decided to call him "Marko" in the index, since that was his birthname and also the name engraved on his own personal mug.

In the first novel, *Pepper Pike*, Milan has several encounters with a Mafioso who wears sunglasses. Since Milan never knows his name in that book, he calls him "Sunglasses" in the narrative. "Sunglasses" and another Mafioso with no distinguishing characteristics give Milan a beating. As I indexed *Pepper Pike*, I had to use the heading "Sunglasses." Several books later, Milan meets "Sunglasses" again and knows that his name is Joey. It isn't until several scenes later that the reader is given Joey's surname. I wound up indexing him by his full name but putting Milan's nickname for him in parentheses, since using the name might otherwise confuse someone looking up references to *Pepper Pike*. The full heading became:

Bonfiglia, Joey (Mafia errand boy, aka “Sunglasses”) (with a cross-reference from the heading “Sunglasses”). The other Mafioso is later revealed, several books later, to be John Terranova. At this point I stopped indexing the later novels and went back to *Pepper Pike* to add entries for this character.

Finally, Milan has several important women friends over the course of the series. Three are his lovers, while one is a possibility that never comes to anything. This presented a problem well-known to advice columnists, who are frequently asked, “What do I call the person I’m dating, in love with but not living with, sleeping with, living with, etc., when I have to make a social introduction?” “Boyfriend” or “girlfriend” sounds too high-schoolish, “lover” may tell too much while “roommate” is ambiguous. I needed a category that would include all four women and finally settled on *Romantic interests* (a subheading under the Jacovich, Milan heading).

Scene-by-Scene Indexing: I tried to write at least one index entry for every scene. Telephone calls were sometimes picked up if important information was given; telephone calls that were merely the set-up for a face-to-face meeting were often not indexed.

One problem with indexing almost every scene was the wording. Since the book is written in first person, Milan is in the midst of every scene described. I had to be careful not to begin every entry with “Milan requests...” or “Milan interviews...” Conversely I was not as concerned about picking a strong key word for the beginning of each entry, because the index subheadings are not organized alphabetically (as discussed earlier).

A larger problem was presented by the necessity of keeping certain elements of the novels secret. Dave and I had decided early on not to reveal the identities of the various murderers; Dave had even written a suggested editorial note entry which I liked and included:

Murderers

You’ll have to read the books to find out!

After all, part of the fun of reading any mystery is guessing, along with the protagonist, who the murderer is, while picking up on the author’s clues. I had to be careful not to reveal the fact, in the entries under his or her name, that a character is a murderer. Often there was a final, and violent, confrontation between Milan and the murderer. I usually just indexed these with the ambiguous term, “confrontation with Milan.” There are other confrontations which were not with murderers, so I felt the description preserved the murderers’ identities. Hazel K. Bell discusses this problem in her article, “Indexing fiction: a story of complexity” (*The Indexer*, October 1991). Bell states, “Elements of mystery, undeniably, cannot survive indexing: a charming child’s riddle quoted I listed under its solution, ‘egg’; and to read the index before the text would indeed negate the sheer shock of the sudden death of one heroine. But consulting the index to such books *before* the text should be deplored anyway!”

Bell’s conclusion is questioned in a student paper found on the Internet, *Origins and Objectives of An Index to the English Patient* by Michael Ondaatje. The author, Lisa Mirabile, states, “...Doing so does change the reader’s experience as designed by the author. Many things, however, can similarly alter a reader’s experience, such as reading the pages out of order, or even taking so long to read the whole book that important early details slip the reader’s mind. The author can go only so far in dictating the reader’s experience.”

An index to a series seems to show the exception to Bell’s statement that the reader should not consult the index before reading the text. I can easily imagine a person reading three or four of the novels and then

going to the index to look something up. Thus I decided that it was important to reveal as few of the “surprises” as possible.

For instance, in *Pepper Pike*, Richard Amber calls Milan to request his help and then disappears for most of the novel. The reader does not know if he has been murdered or kidnapped. It’s even possible that his absence is voluntary. Finally, on page 168, Amber’s corpse is pulled out of the Chagrin River. I indexed this scene simply as

Amber, Richard
found, PP 168-70

However, I must confess that I was not always able to conceal all surprises. A similar situation to the one in *Pepper Pike* occurs in *The Cleveland Connection*, where Bogdan Zdrake is missing until page 96. Since there was a major scene at his funeral, which I wanted to index, I decided not to try to conceal *his* death.

Another “surprise” that I thought it important to conceal was the death of Milan’s best friend, Marko Meglich, in the eighth book of the series. I thought it might be emotionally difficult for a reader in the middle of an earlier novel to skim down the entries at the heading for Marko and learn that he had died. The death occurred at the end of *The Cleveland Local*; Meglich dies saving Milan from a murderer. It is one of the best-written and most emotionally riveting scenes in the series. The index entry says merely:

Meglich, Marko
shot, CL 277-79

In the book directly following the death, *A Shoot in Cleveland*, Milan’s grief and depression are described, and several friends tell him to get over it and go on with life. Again, I had to be careful not to give too much away. The entries here read:

Meglich, Marko
Milan’s thoughts and feelings about, SC 2-4
Ed Stahl’s advice to Milan, SC 4-7
Vukovich’s advice to Milan, SC 137-38

Setting: Many mystery series are known for their settings. Tony Hillerman’s mysteries are based in the American Southwest, while Robert B. Parker’s Spenser series takes place mainly in Boston. Readers who have been to these locales take pleasure in the authors’ descriptions of familiar places, while readers who do not know the areas have the fun of learning something new about the place. Les Roberts is a good publicist for Cleveland in his novels.

For the benefit of readers unfamiliar with the United States, Cleveland is a large city in the state of Ohio in the American midwest, set on Lake Erie, one of the five Great Lakes that lie between the United States and Canada. While not as large as New York, Los Angeles, or Chicago, it has a huge mix of different ethnic types that contribute to its variety and diversity. Cleveland has a world-class art museum and symphony orchestra, its own opera company, and several world-renowned hospitals. Suburbs surrounding the city are full of gracious older homes at very affordable prices, in contrast to cities like New York and Los Angeles where houses are not in the average family’s price range.

Milan’s ethnic heritage is Slovenian. His parents emigrated to the United States and his father became a

steelworker. Milan's ethnicity mirrors the widely varied ethnic composition of Cleveland, a city with a large number of inhabitants from eastern Europe. Milan's father, a blue-collar worker, was able to send his son to college so that Milan could become a professional man. Milan's background is similar to many other immigrants' sons and daughters.

Author Roberts draws freely on his love of Cleveland to provide the series with an authentic and realistic background. There are many restaurants mentioned in the series. At Dave's suggestion, I created two headings for these, rather than indexing them at the restaurant name. The headings are:

Restaurants and bars, fictional
and
Restaurants and bars, real

This was one of the more fun things to index in the series. As a person addicted to eating—needing to do it two and even three times a day—but hating to cook, I'm familiar with some of the restaurants that are mentioned in the books. Other mentions have been inspirational—I found a very good restaurant named Jack's Deli from the references in *two* books of the series.

Some of the fictional restaurants are thinly disguised versions of real restaurants, such as Watershed instead of the real restaurant, Watermark.

I considered creating a third heading, Restaurants and bars, defunct, since some of the restaurants mentioned in the novels have gone out of business. I decided not to use this heading because it would need constant updating as restaurants come and go.

I indexed Cleveland hotels, statues and monuments, bridges, buildings, and suburbs. Dave gave me some useful advice when he told me to provide more information when I wrote such entries. So Dillard's became Dillard's Department Store and Rocky River became Rocky River (suburb) because there is also a river by that name. However, I decided not to index individual streets. There were just too many references to street names as Milan drives around the city and nearby suburbs to interview witnesses.

Les Roberts' descriptions of the city add much to the series.

Of course, Roberts actually lives in Cleveland. His perceptive descriptions are in sharp contrast to a recent best-seller I read set in Shaker Heights, a wealthy Cleveland suburb. In that novel, the author has the main character take a toll bridge—which doesn't exist—to Cleveland Hopkins Airport. Les Roberts would never make a mistake like that!

Miscellaneous Bits Indexed: There are many references in the series to books, movies, Cleveland radio stations, and television programs. I did not pick up references to individual actors' names, but I did create separate headings for Books, Movies, Radio Broadcasting, and Television. Incidentally, one of the novels, *A Shoot in Cleveland*, is about a movie being made in Cleveland. The many movie references are surely a reflection of the author's interest in film—Les Roberts and Dave are both on the board of the Cleveland Film Society. Les also worked for most of his career in Hollywood in television and film.

I also picked up all references to the Cleveland Indians, Browns, and Cavaliers (respectively, the baseball, football, and basketball teams). Cleveland fans take their team sports very seriously, so these were essential entries.

It has been my experience that most indexers have a great sense of humor. Several indexers I've worked with have found their greatest pleasure in writing amusing parodies of company memos. Others seem to make it a full-time job to find funny stuff on the Internet and e-mail it to everyone they know.

I thoroughly enjoyed Roberts' sense of humor in the series. When I indexed the first novel, I laughed aloud as I read this line: "I gave her my card and she regarded it as if it were made of Kryptonite." I just had to index this! I wrote an entry:

Kryptonite, Milan's card regarded as, PP 208

I thought the entry might make an amusing tidbit for browsers of the index.

When the author saw this entry in an early draft of the index, he was pleased, and commented that he thought he would be remembered for his writing more than for the intricacy or plot turns of the mysteries themselves. I believe Roberts has real insight here; I know that I cannot recall the detailed plots of the mysteries I've read. I like Sayre's Wimsey books for the characters of Peter and Harriet, and particularly for Peter's amusing conversation; I like the Spenser series for the dialogue and relationships between Spenser, Susan, and Hawk.

Some of the humorous entries I picked up from the witty narration are:

Jacovich, Lila (Milan's ex-wife)
guilt, as midwest distributor of, FC 131

Hairspray, cuts off circulation and makes wearer snap at people, FC 4-5

Toledo, Ohio
drive from Cleveland to Toledo is like a drive-by sensory deprivation
center, CC 76

That last observation is dead-on.

Earlier I stated that I created entries when Cleveland's sports teams are mentioned. Several years ago, the owner moved the Cleveland Browns to Baltimore, Maryland, where they became the Baltimore Ravens, an object of hatred for every good Clevelander. I made the following entries:

Baltimore Ravens football team
chances of winning the Super Bowl are 'nevermore,' CB 141
Cleveland fans' favorite team is anyone playing against them, SC

308

Finding and indexing these humorous bits greatly enhanced my experience of indexing the series.

Conclusion

I had always thought that indexing fiction would be easier than indexing legal materials. A good indexer of

legal materials must understand the law, be able to connect identical topics that are called by different names over a hundred years of legislation, and index to accommodate both the attorney and the layman. To my surprise, I found fiction indexing just as challenging and perhaps even more difficult. The decisions of what to index, when to write an entry and what to ignore, and particularly what to conceal, were essential and important puzzles to solve. It was fascinating to explore this new field of indexing, and I would like to thank Dave Ream and Les Roberts for giving me the opportunity to work on the project. You can view the index on-line at the Leverage Technologies web site <http://www.levtechinc.com/Milan/MilanIndex.htm>.

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From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

Editing the ANZSI/AusSI Newsletter Index—Mary Russell

Introduction

- There are 40 years' worth of ANZSI/AusSI newsletters to be indexed.
- 30 indexers, non-members and members are busy indexing
- So far 12 years have been indexed and it was these merged files that was used at this session

General discussion

- The stylesheet provided to the volunteer indexers dealt with the page number format. It also suggested that main headings rather than subheadings should be used.
- Indexers were pointed to *The Indexer* index for guidance.
- It is inevitable that some things will need flagged for a second reading.

Names of people

- Early newsletters used titles, e.g. Barnes, Ms D, new member. Should these titles be kept?
- General consensus: Leave them for now, and decide on whether to remove then later when there is more information (e.g. will there be more Barnes, D entries)
- Early newsletters also included membership lists with name and contact details (this redacted in the scanned copies that were put online).
- Mary will check with John Simkins regarding access to full membership lists for checking.

Merged index/separate annual indexes

- Should there be a merged index, and should each annual index be repeated on each annual newsletter's web page?
- General consensus: Having both the merged index and separate annual indexes would be useful. One member (Glenda) though she would use the merged index most of the time.
- Separate indexes for names and article titles were also suggested.

The Indexer

- How should *The Indexer* be filed—as *The Indexer* or *Indexer, The*?
- General consensus: It should be filed under 'I' as *Indexer, The* which agrees with the Australia/New Zealand standard (this states that titles should be inverted).
- Adding [journal] as a qualifier was also suggested.

Registration/registration

- Should registration (as an achievement) be given an initial capital?
- General consensus: Lower case (registration) for the award, upper case (Registration) for the panels, committees, etc.

Registration/registration (*continued*)

- After some initial agreement that registrations (plural) should be used for process, i.e. registrations (main heading)—new members (subheading), the following was decided:
 - registrations (award)
 - registration process (as a main heading)
 - Registration Panel (on one line)

Regional branches

- Example: ACT Region Branch AGM [+ year]
 ACT Region Branch annual report [+ year]
 ACT Region Branch annual reports

Should the year be included in the headings? Mary's preference is for ACT Region Branch annual reports, [locators] as a main heading.

- It was suggested that:
 - page ranges could be arranged in 5-year chunks
 - the year should not be repeated as part of the main heading
 - photos could be a subheading under the AGM main heading (but this may end up as a sub-subheading when 5-year ranges are used)
 - using a model where major subheadings were converted to main headings seems to work well, e.g. ACT Region Branch (main heading)—formation (subheading) and ACT Regional Branch training courses (main heading)
 - this could be decided at the end of the process when the full picture is available
- There was some discussion (but no decision) on whether “presidential report” was a better term than “annual report”. But we were quite definite that the AGM (the event) and the annual report are quite separate.

The metatopic: ‘I’ for indexing

- The list of entries under indexing (process) is very long. Mary suggested that the specific types of indexing could be filed under indexing type, e.g. indexing (main heading)—annual reports (subheading) could become annual report indexing (main heading). Another member (Terri) said she had used indexing (specific type).
- General consensus: Filing indexing books under ‘B’ is too general
- General consensus: The indexing section needs to be broken up. Double-posting is supported. It was suggested that the main types of subheadings under “indexing” should be pulled out and made into main headings.

Summaries of book reviews that mention indexes

- General consensus: No to including the author of the book, the author of the review and the title of book, but page references should be included in the index.

Summaries of book reviews that mention indexes (*continued*)

- General consensus: Although including the book titles would be useful, they would take up a lot of space. So they could be omitted from the index, but they could go to make a useful stand-alone document. The main newsletter index could link to the stand-alone file. For this stand-alone document:
 - books with no index could be included
 - entries could be left under the name of the book
- It was also suggested that entries could be arranged under either “index mentioned” or “mentioned no index” and that “book reviews”, “index mentioned”/“index not mentioned”, and page references could link to the separate index.

Conferences

- Agreed that the year and location of the conference should be included.
- Agreed that, apart from there perhaps being some exceptions (which weren’t described), subheadings should not be pulled out to become main headings because the topic is not going to grow.

Committee/Council

- Agreed that the index should use the term that was used at the time, i.e. either Committee or Council, and that *see* refs should be added.

What next?

- The index could be put on Google Docs (as Glenda suggested) in order to acquire more information, e.g. to expand names. People will be informed of its location via the website. We can choose to let anyone in the world comment on the index but can restrict editing rights.
- Going through a “can you help” process, e.g. in order to decipher initials on articles.
- When in doubt, the example of the index to *The Indexer* should be followed. This will give some sort of consistency of approach within the profession.
http://www.theindexer.org/index.php?option=com_content&task=view&id=71&Itemid=50
- There are still years available to be indexed. Editing and checking work is also available.
- The original, unedited, merged version of the index should be kept as a teaching tool.

ANZSI Conference, March 2013

Friday session: International Panel - chair: Mary Russell

Society of Indexers (UK) - report by Ann Kingdom (read by Mary)

Membership of SI seems to be holding up reasonably well, given the economic situation, though uncertainty about the future of indexing inevitably means that fewer people made redundant in other areas see it as a possible new career. The latest fees negotiation survey (which has not yet been properly analysed) also suggests that there is more pressure from clients to accept lower fees. However, it's not all gloom and doom; the majority of respondents felt they were being offered about the same amount of work (or more), with less than 20 percent feeling there was less work around.

Like any small society, we continue to struggle to fill key posts, and with two significant retirements from the Executive Board at this year's AGM, and two more next year, we need a supply of new blood to take over the running of the Society. There is, for instance, some reluctance amongst local groups to take on conference organization, despite the fact that much more is now done centrally in the office. And although our newsletter editor's retirement was known months ahead, it was not until the AGM that two new editors volunteered their services. Newer members may well have the relevant skills and experience, but are inevitably reluctant to take on too many commitments while trying to establish their indexing careers; those of us who are longer in the tooth have 'been there and got the T-shirt' (literally in many cases!) and are looking forward to winding down.

Like indexers the world over we are facing the challenge of new technology and our small Publishing Technology Group (PTG) has been working extremely hard in the background, putting together a website that aims to keep both publishers and indexers well informed about new developments. This has been available for members for some time (and for members of other indexing societies) and it is hoped that it will soon be made public, with a small part reserved for members only. (I understand Glenda will be saying more about the work of the PTG.)

In terms of training, regular improvements continue to be made to the SI online training course. Although the course has always concentrated on the basics of the indexing process rather than instructing students in the use of indexing software, newly qualified indexers nowadays need to be much more technically savvy, able to cope with new approaches and new technology. It is hoped that embedded indexing, for example, will eventually become a compulsory part of the course. Many newly qualified indexers do of course take their first step in CPD by attending a workshop on embedded indexing – either hosted by a local group or tagged onto the end of the annual conference. But arranging CPD for a small society with a scattered membership is always going to be a problem (even in a country the size of Britain). One answer to this is to make workshops available online, and this is just what we have done. Building on the success of the online tutorials, which are now a compulsory part of the training course, we have recently launched our first online workshop – 'How to edit an index; creating order out of chaos'. This is an expanded and updated version of a face-to-face workshop that the tutor has run successfully for many years.

Raising the profile of indexing is something we are all trying to do, particularly in the face of public ignorance and assumptions that free-text search is the answer to everything. The role of social media is of course becoming more important here, and our Twitter and Facebook accounts are updated by a team of two enthusiastic volunteers on a daily basis throughout the working week. We are also currently engaged in revising some of our publicity materials, including *Last but not Least*, our booklet on commissioning indexes, which will be distributed to many UK publishers as well as appearing on our website. Some useful publicity stemmed from a discussion about proofreading indexes on the email list of our sister organization, the Society for Editors and Proofreaders (SfEP). Displaying woeful ignorance amongst some editors, this has led to a series of articles by our Chair and three workshops specifically aimed at editors (with another due to be held at the SfEP's conference). All have been very well received and helped to dispel some of the common myths about indexing. Another fruitful approach has been the development of links with some of the universities running courses on publishing; to date several groups of students have benefitted from talks from practising indexers. Hopefully they will remember to make the case for indexing when they find themselves in influential positions in publishing houses.

Do awards help to promote good indexing? The Wheatley Medal was established over 50 years ago by the then Library Association in association with the Society of Indexers. It is well known amongst indexers but, with a few exceptions, few publishers are aware of its existence. It has thus manifestly failed to live up to its proponents' hopes: encouraging publishers to use good indexers to compile high-quality indexes. Opinion within SI as to the relevance of the Wheatley is divided, but in the short term the Executive Board has taken the decision not to run the award this year. The suggestion that a new award for 'index-friendly' publishers should be set up met with considerable initial enthusiasm and an online survey was run last year in an attempt to identify a suitable recipient. In the first stage, members were asked to nominate those publishers they felt deserving of such an award, while the second stage asked them to rate these publishers on a range of criteria. However, the results of this were inconclusive, with only 10 per cent of the membership contributing to the second stage of the survey, and many publishers being rated by only one indexer. This was a useful exercise – perhaps more of a pilot project – and for the time being this initiative has therefore been laid to rest.

The website is usually the first port of call for anyone wanting to find out about indexing. We have been conscious that although it contains a wealth of material, it is not always as accessible as it might be, and some efforts have been made to revamp the navigation and make it easier for the main categories of website visitor to go straight to the pages that are most relevant to them. Keeping a website up to date and archiving older material is an ongoing task that again relies on committee chairs, etc. monitoring sections that are relevant to their responsibilities. A vital part of the website is the directory of 'Indexers Available', which is currently undergoing a major revamp. For various reasons, this has taken much longer than anticipated, but we are hopeful that when the new system is eventually launched it will enable indexers to specify their specialisms in more detail and help clients to identify the most appropriate person for each particular project.

This year our conference will take place in a purpose-built conference centre, complete with health spa and various other facilities. We hope that some of our colleagues from the other indexing societies will be able to join us there to 'revitalize our businesses and refresh our skills'.

Indexing Society of Canada / Société canadienne d'indexation (ISC/SCI) - Heather Ebbs

ISC/SCI launched a new website last year that, among other things, incorporates a revised logo. There is a password-protected area for members where they are able to share the newsletters of sister societies and other member documents. The Register of Indexers Available is now online only and no longer requires a separate editor, which means that the society's constitution will need to be changed to take that position off the executive; the society will be using the opportunity to make the constitution more flexible in terms of executive positions. ISC/SCI is instituting an indexing award, hopefully in 2014, called the Ewart-Daveluy Award after the anglophone indexer of the Canadian statutes in 1870 and the francophone founder of the first French-language library school in Canada. The award will be available for French or English indexes.

Their next conference is in Halifax on 7-8 June 2013. The keynote speaker is Nancy Mulvany. Also coming are Pilar Wyman, David Ream, a panel on indexing lives and biography, Elaine Ménard talking about controlled vocabularies for images, Frances Lennie, Hillary Calvert and Max McMaster, and Caroline Diepveen from the Netherlands.

ISC/SCI is a very small society with 116 members, the bulk of whom are in Toronto and Vancouver, with others from across the country, so Toronto is the only branch that holds regular meetings. It's a small, friendly society. There are very few French indexers who are members, as French language indexing is relatively young in global terms. Any publications produced by the government need an index in both languages.

American Society for Indexing (ASI) - Pilar Wyman

Pilar was shocked to learn the Wheatley Award is not having a winner this year. They do have a winner for the Wilson Award this year. They have not had a winner in some years more due to lack of quality or not many entries. Publicity could be improved. This year they had a positive response from publishers which are small steps for recognising the need for quality. An ideal index or quality measure is needed out there.

Their conference this year is 18-20 April. The winner of the Wilson Award will be on display. Presentations include ones from Joshua Talent on ebooks, the Digital Trends Taskforce, ebook conversions, Corey Pressman, and on indexing for Apps.

ASI is looking to increase their online access by providing more webinars and other site improvements. For example, they recently launched a mobile version of their website version, revamped their vision and mission statements, and are investigating promoting standards of indexing.

Their membership is holding strong at a little under 700 members. The numbers are down for conferences and funds are also down. They are considering what membership benefits to provide in such a time of change, and may consider hosting more regional conferences.

For the first time in a few years they are also giving an award of service (their Hines Award).

The 2014 conference will be in Charleston, South Carolina and the 2015 conference will be in Seattle.

The China Society of Indexers - Takashi Matsuura

The China Society of Indexers (CSI), with its headquarters located in Fudan University, Shanghai, is an independent non-profit academic organisation engaged in index research and study and is also a national incorporated mass organisation, whose qualifications have been examined by the Translation & Compilation Bureau of the Central Committee. The society has 1000 members.

The Society aims to be sincere and realistic, and to dedicate itself to index research and study. It aims to promote research and the study of index theory, to promote index compilation and publication, to train professional indexers and strengthen academic exchange at home and abroad. Some of the departments under the Society are the Compilation Department, the Research and Study Department, and the Propaganda Department, etc. The Society holds an annual meeting and also holds academic seminars and an award-giving ceremony.

The Society also held the First National Liaison Meeting in October 1995. At present, the China Society of Indexers is uniting indexers all over the country and overseas colleagues to broaden areas of index service using modern advanced indexing methods.

The Chinese indexers will meet in Shanghai in October this year; at least that is their plan. I encourage you to participate. Let us all meet in Shanghai.

Metatopic Menace

or

Indexing in the Age of Search

Kay Schlembach
Senior Partner, Potomac Indexing, LLC
potomacindexing.com/publications.php



introduction

- Who I am and why I care
- Humbled
- Disclaimer



- Remember: no rules, only contexts



naming the menace



audience considerations

- General usability
- Kids and other users
- Search engines
- E-books



terminology

- Metatopic “mainmain” –
main topic of whole document
- Local main topics “main” –
main topic of a particular section or
sections



introduction

- Who I am and why I care
- Humbled
- Disclaimer
- No rules, only contexts



for your consideration

- Building bridges between users and content
- Index as a portal
- Old days focused on content, now the conversation
- Navigation, satisfaction, quick retrieval, discovery, and cross-marketing



a change of scene

Your index is a portal
into the
universe of content*

*this may be a book



just chatting

The interaction between the user and the index is a conversation.

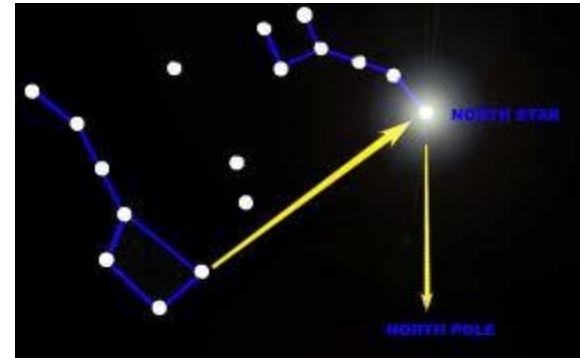
Think about user

- ❑ Satisfaction
- ❑ quick retrieval
- ❑ discovery



follow the stars

The index is also a navigation aid, and should be easy to use.



usability

- Olason's usability study (2000) – users unfamiliar with content go to heading which reflects title of document.
 - THIS IS PRIOR TO SEARCH.....Think about it.
- In books, although the table of contents (TOC) was available, users tried to find this same type of material in index.



usability

- Olason's study also indicated that undifferentiated (floating) locators with subheadings were confusing, except when they indicated primary discussion spreads.



- if not chunks of information (lifeboats), then cross-references.
- brevity



indexer considerations

- The metatopic will drive the structural development of the index
- The ever present problem with metatopics is the temptation to index the entire document under a single overarching topic, OR ignore the direct indexing of the metatopic altogether.



taming the monster: sketching

■ Linear approach, such as outline

ORIGINS OF AGRICULTURE

■ AGRICULTURE COMPARED TO HUNTING-GATHERING

- Advantages of Agriculture
 1. More efficient use of land
 - agriculture: 1 sq km supports 50 people
 - hunting-gathering: 25-30 sq km support 5-6 people
 2. More stable food source through year (with storage)
 3. More free time in non-critical seasons
- Disadvantages of Agriculture
 1. Malnourishment
 - farmers often deficient in protein
 2. Labor intensive in critical seasons
 3. High risk if crops/herds fail

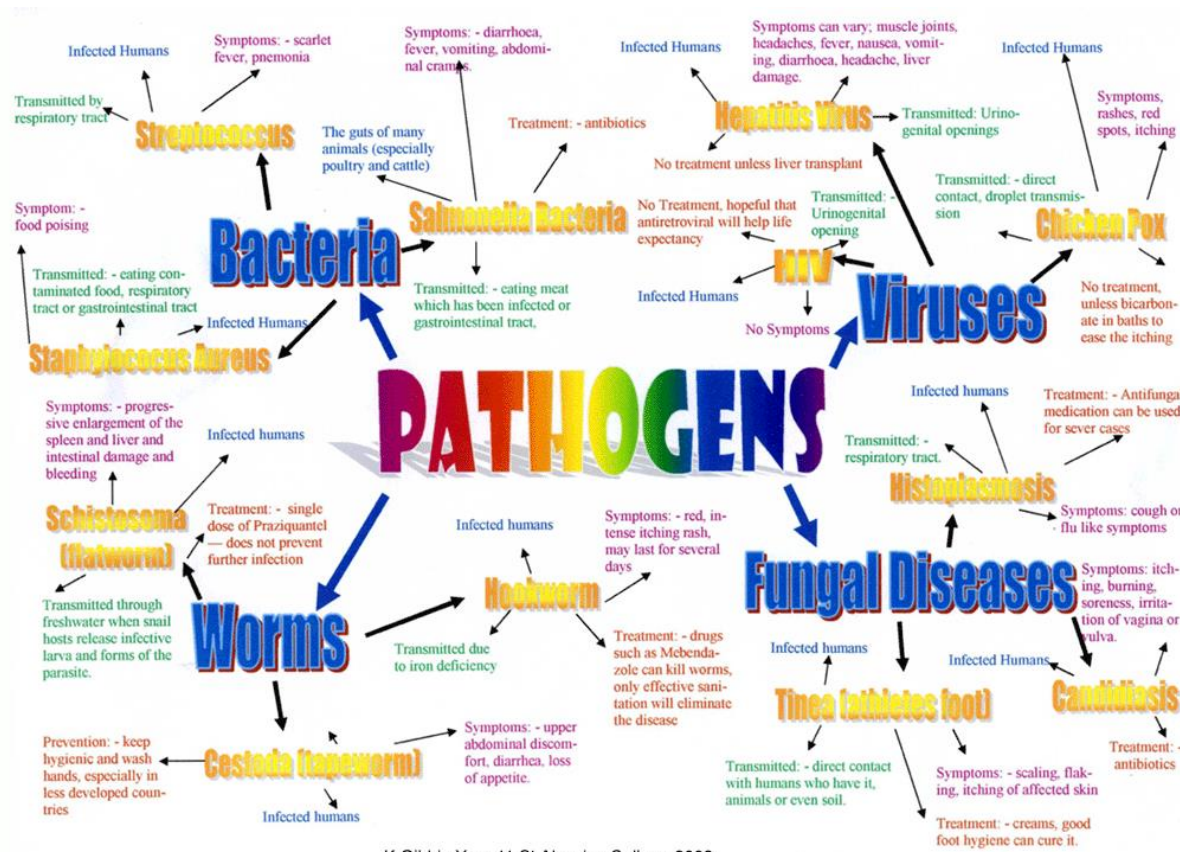
■ IDENTIFYING DOMESTICATES IN ARCHAEOLOGICAL RECORD

- Plants
 1. Seeds are bigger in size
 - example: teosinte to maize
 - example: domesticated sunflower is at least 5 mm
 2. Seed coats are thicker
 3. Found outside natural range of distribution
- Animals
 1. Horns change in morphology
 - example: sheep
 2. Body size changes
 3. Changes in coat or fur
 4. Age-sex distributions in skeletal collections



taming the monster: sketching

- Graphical approach, such as concept map



K.Gibbie Year 11 St Aloysius College 2008



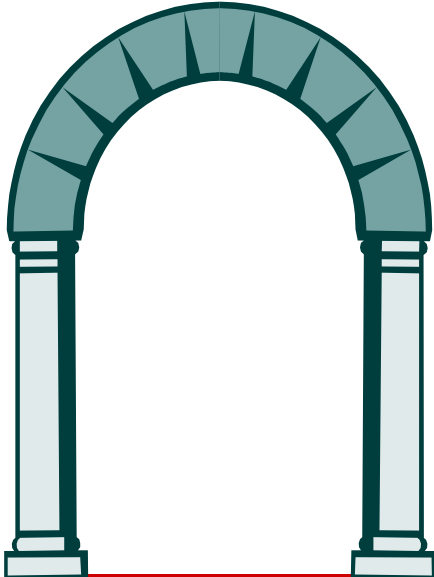
taming the monster: indexing

- Traditional approach
- Table of Contents (TOC) approach



traditional approach - textbook

- User knowledge assumptions by indexer
- Subheading stand-alone test...



traditional approach - textbook

Latin America

misconceptions and stereotypes of, 1–4

nations and territories, 10*m*, 11*t*

reasons to study, 4-7

see also specific nations, such as Peru; specific regions such as cultural regions; specific topics



TOC approach - textbook

Latin America

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Iberian heritage, 96–120
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misconceptions and stereotypes of, 1–4
nations and territories, 10*m*, 11*t*
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reasons to study, 4–7
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traditional approach - scholarly

Capital punishment. *See* death penalty

Death penalty

cognitive dissonance regarding, 3, 85-89, 137-140, 417

symbolic role of, 15-17

see also capital crimes; executions; *specific state jurisdictions; specific topics*



TOC approach - scholarly text

Death penalty

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symbolic role of, 15-17

see also specific state jurisdictions; specific topics



traditional approach - textbook

- no information at “child development”

or

- **Child development**

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defined, 4–5

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individual differences, attempts to address, 21–24

see also specific modes of development, such as cognitive development;

specific periods of development, such as early childhood; *specific topics*



TOC approach - textbook

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- critical issues in, 5–11
- defined, 4–5
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traditional - two distinct, interlaced metatopics

Demographics

categories for. *See specific demographic categories, such as age, race or sex*

Census data controversies

and educational attainment. *See specific criteria for educational attainment, such as high school or college*

metrics

research on educational attainment

Educational attainment

criteria for. *See specific criteria for educational attainment, such as high school or college*

by demographic category. *See specific demographic categories, such as age, race or sex*

demography-based metrics

as national policy issue

research on demographics



TOC - two distinct, interlaced metatopics

Demographics

Census data controversies
metrics
research on educational attainment

Demographics, categories for

age
disability
geographic location
home ownership
household configuration
income and wealth
parent occupation and employment status
race
sex
student occupation and employment status

Demographics, and educational attainment

less than 9th grade
high school drop-out
GED
high school graduate
some college
Associate's degree
Bachelor's degree
professional degree
Master's degree
Doctorate degree

&

Educational attainment

as national policy issue
research on demographics

Educational attainment, categories for

less than 9th grade
high school drop-out
GED
high school graduate
some college
Associate's degree
Bachelor's degree
professional degree
Master's degree
Doctorate degree

Educational attainment, by demographic category

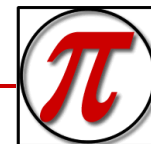
age
disability
geographic location
home ownership status
household configuration
income and wealth
parent occupation and employment status
professional degree
race
sex
student occupation and employment status



TOC – dense scholarly indented

international migration law

air and sea transport, 1d–9, 10–1. *See also* air and sea transport, legal regulation of
emerging legal issues, 1d–20, 15–1. *See also* emerging legal issues in international migration
global institutions, 1d–15, 13–1. *See also* global institutions and processes
governance issues, 1c–12, 3d–13, 15d–1
human rights, 1d–5, 6–1. *See also* human rights
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refugees and asylum seekers, 1d–6, 7–1. *See also* refugees and asylum seekers
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smuggling and, 1d–8, 9b–1. *See also* smuggling
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state sovereignty, 1d–4, 5–1. *See also* state sovereignty



TOC – dense scholarly indented

international migration law. *See also more specifics under each aspect of international migration law*

air and sea transport, 1d–9, 10–1

emerging legal issues, 1d–20, 15–1

global institutions, 1d–15, 13–1

governance issues, 1c–12, 3d–13, 15d–1

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national and international law, relationship between, 3a–18

nationality, 1d–3, 4–1. *See also* nationality

patterns of migration, contemporary, 1d–1, 2–1

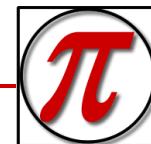
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traditional/TOC – dense scholarly run-in

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traditional/TOC – dense scholarly run-in

Christian religion, 29-276: character of persons first embracing Christianity, 238; crucifixion of Jesus, 98–99, 154, 188, 219–22, 236, 258; divisions between Christians, 251–76 (*see also* divisions between Christians); duties of Christians consequent to, 243–48; excellence above all other religions, 107–10; existence of Jesus as person, 97–99; faith, acceptance on, 136; God and God's providence, 29–95 (*see also* God; providence of God); human nature, Christians accused of worshipping, 227–29; indifference to religion, rejection of, 277–88 (*see also* indifference as to religion); indifferent things, doctrine of, xi–xii, 260 (*see also* *adiaphora*, doctrine of); Judaism, origins of Christianity in, 189; judgments of God against Christians, 231–34; low condition of Jesus, arguments based on, 219; [miracles of Jesus, 99–102](#) (*see also* [miracles](#)); Muhammad and Jesus compared, 237–38; nature of argumentation about religious truth and, 135–37; neighbor, love of, 116–19, 185–86; New Testament, authority of, 139–56 (*see also* New Testament); [non-Christian religions, confutation of, 167](#) (*see also* [Islam; Jews and Judaism; paganism, confutation of](#)); oaths, 124; Old Testament, 157–66 (*see also* Old Testament); ; persecution of Christians, 134–35, 169, 239; polytheism, Christians accused of, 225–27 (*see also* polytheism) ; propagation of religion, 129–35, 239–40; public profession of Christian faith, importance of, 251–53 (*see also* public profession of faith); relative strength of proofs regarding Christianity, 137; resurrection of Jesus, 102–13, 258 (*see also* resurrection of Jesus); sexuality, women, and family, treatment of, 114, 119–22, 124; Son of God, Jesus as, 241–42



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Between you and me : a memoir / Mike Wallace with Gary Paul Gates.—1st ed.

p. cm.

Includes index.

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next steps

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www.theindexer.org/files/22-2/22-2_091.pdf
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- Stauber, Do Mi. *Facing the Text*. Cedar Row Press, 2004



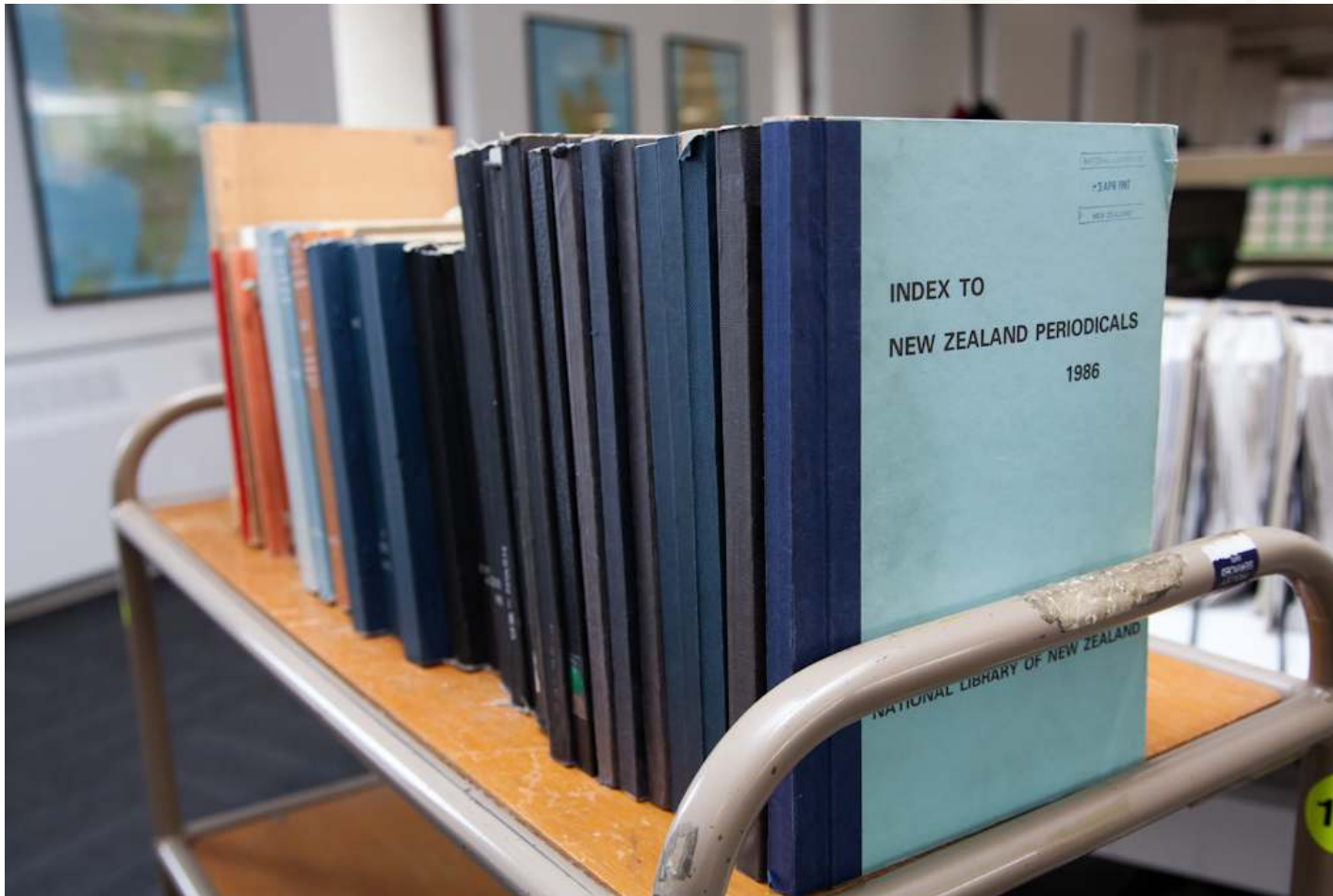
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Index New Zealand Statistics

- Over 750,000 articles indexed
- Database growing at about 3000 records per month
- Over 460 current publications indexed
- Total of 1000 publications indexed
- Team of 12 indexers
- 300,000 searches per year

Predecessor of Index New Zealand



History of INNZ

- 1940-1987 Index to New Zealand periodicals
- 1984 National Research Advisory Council project
- New Zealand Social Science Abstracts (experimental database)
- 1986 National Library takes over NRAC project and merges it with newly created INNZ database
- 1988-1999 (May) INNZ online hosted by Kiwinet (subscriber only)
- 1988-2003 Microfiche, paper copy then CDRom produced
- 1999 Migrated to Endeavor's Voyager system
- 2003 Schools free access to INNZ online
- 2007 Open access to all users via web

Who else is indexing New Zealand material online?

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- findNZarticles
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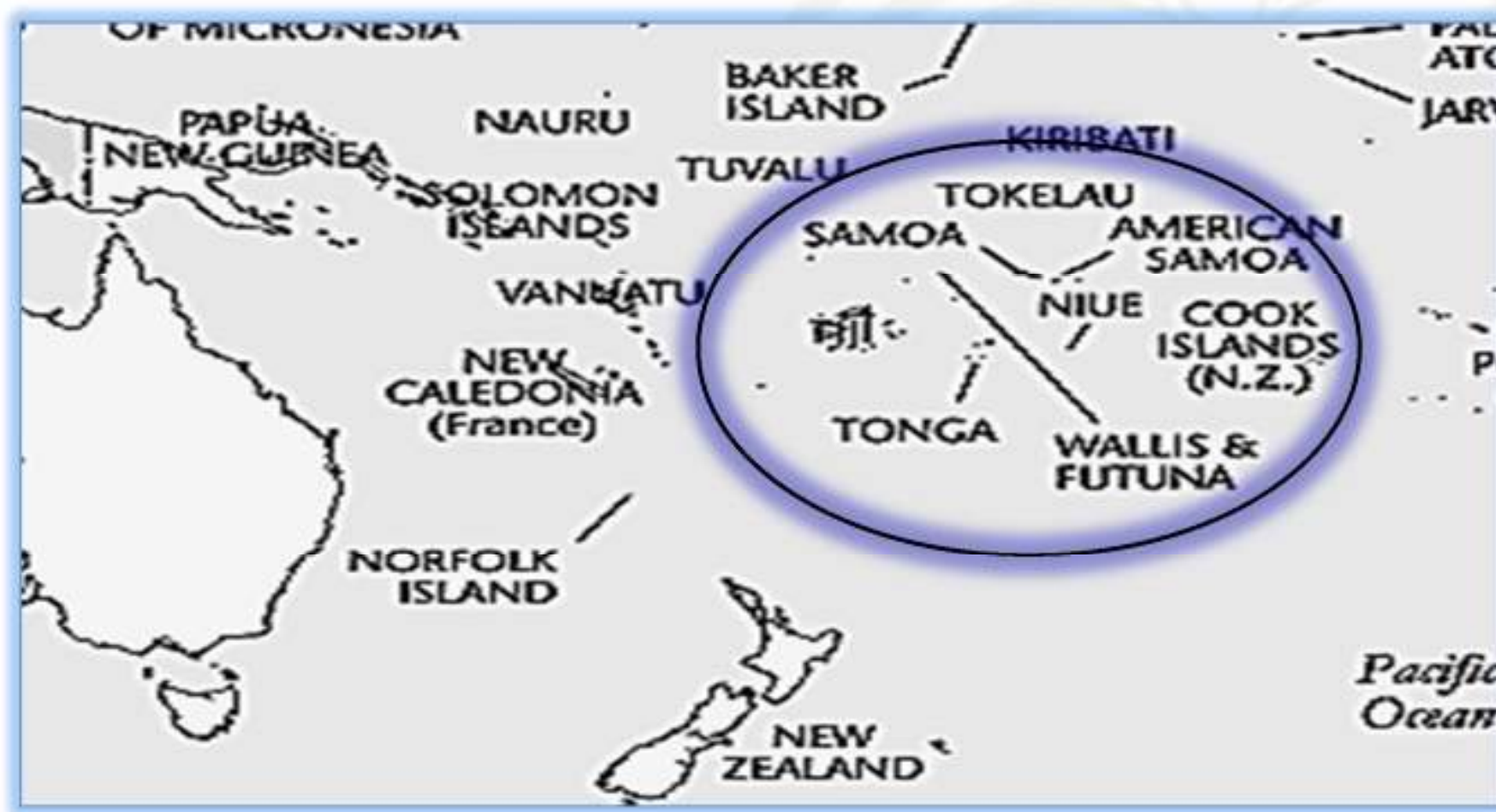
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- Largest user group – universities and polytechnics
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- Top titles – mainly biographical information from newspapers

INNZ Scope

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South Pacific countries in scope



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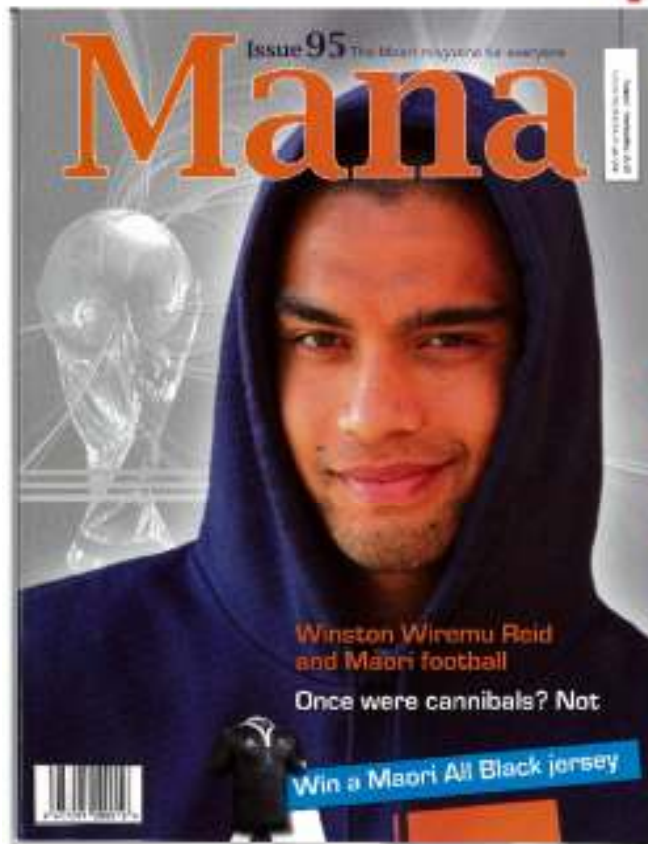
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Journals – Biographical Indexing



Newspapers

- Biographical
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- Reviews

The Otago Daily Times.

The New Zealand Herald.

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- Indicative abstracts:
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 - Rowley, Jennifer E. (1988) Abstracting and indexing, 2nd ed. London : Clive Bingley Limited.

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Addresses	Chronicles	Discusses
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Advocates	Concentrates	Evaluates
Aims	Concerns	Examines
Argues	Considers	Explains
Attempts	Debates	Explores
Backgrounds	Depicts	Features
Calls	Describes	Focuses on
Challenges	Details	...

Subject Access

- APAIS (Australian Public Affairs Information Service)
- FAST – Faceted Application of Subject Terminology
 - Personal names, Corporate names, Geographic names, Events, Titles, Time periods, Topics, and Form/Genre
 - Over 1,600,000 authority records
- Ngā Ūpoko Tukutuku / Māori Subject Headings



- APAIS access:
 - Beverages
 - Health
- FAST access:
 - Tea
 - Herbal teas
 - Tea & Health aspects

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- **1001_** |a Jones, Lloyd, |d 1955-
- **4001_** |a Eliot, Simon, |d 1955-
- **4001_** |a ג'ונס, לויד, |d 1955-
- **670__** |a His Gilmore's dairy, 1985: |b t.p. (Lloyd Jones) jkt. (b. 1955 in Wellington, N.Z.)
- **670__** |a His The book of fame, 2000: |b t.p. (Lloyd Jones) p. i (lives in Wellington, N.Z. with his American wife)
- **670__** |a Everything you need to know about the world by Simon Eliot, 2007.
- **670__** |a New Zealand Book Council website, Jan. 31, 2008: |b (Everthing You Need to Know About the World by Simon Eliot by Lloyd Jones is a book for 9-14 year olds, written from the perspective of Simon Eliot)

Maori tribe/sub-tribe names (NEW)

- [Iwi-Hapū Names List](#)

Prev Term: Ngāi Taane

Next Term: Ngāi Tahu (Ngāti Kahungunu)

Ngāi Tahu

Use:

Kāi Tahu

Some Practical Examples

Rugby World Cup: 1987–2011



World cup rugby : kick off

By : [Jones, Lloyd](#)

In : Listener, 23 May 1987; v.116 n.2465:p.22-24

Journal Article

Abstract : Backgrounds the forthcoming Rugby World Cup.

Subject : [Soccer](#)
[Contests](#)

Racism behind fury over anthem sung in Maori

By : [Jackson, Willie, 1961-](#)

In : New Zealand Herald, 15 Oct 1999; p.A15
Newspaper Article

Abstract : Comments on reaction to the decision by singer Hinewehi Mohi to sing only the Maori version of the national anthem before the Rugby World Cup match between England and the All Blacks.

Subject : [Māori language](#)
[National characteristics](#)

Scruffy appearances; Rugby was the loser

By : [Hartson-Matautia, Phineas Strong, Craig W](#)

In : Spasifik, Jul/Aug 2007; n.21:p.71
Journal Article

Abstract : Reports on the lawsuit brought against Sydney bar 'Scruffy Murphy's' by Benji Tupou (Samoan) and Marcellus Cook (Māori) after being refused entry under the bar's race exclusion policy that excludes people of Pacific Island, Māori or Middle Eastern appearance. Points out how many individuals are in favour of the ban even though racial profiling is a breach of the Anti-Discrimination Act. Discusses whether Fiji's obsession with Sevens have harmed the national 15-a-side team's chances of making an impact at the Rugby World Cup.

Subject : [Race discrimination](#)
[Pacific Islanders](#)
[Maori \(New Zealand people\)](#)
[Civil rights](#)
[Rugby Union football](#)
[Racism](#)
[Rugby Union football Tournaments](#)

Where: [Fiji](#)

Rugby World Cup 2007; Rugby World Cup 2011 - an opportunity not to be missed

In : Tourism news [electronic resource], Oct 2007; p.11-13
Journal Article

Abstract : Reports on the Tourism New Zealand initiatives to promote New Zealand during Rugby World Cup in 2011. Martin Snedden, CEO of Rugby New Zealand 2011 Ltd, expresses his views on the importance of promotion for the tournament.

About : [World Cup \(Rugby football\)](#)

Subject : [Rugby Union football Tournaments](#)

When: [2011 \(September 9 - October 23\)](#)

Where: [New Zealand](#)

Link to : [Tourism News October 2007](#)
[Archived copy](#)

School's out for rugby

[Black, Joanne](#)

In : New Zealand listener, 29 May 2010; v.223
n.3655:p.28-30
Journal Article

Other version:

#	Source
1	New Zealand listener (Online), 29 May 2010; v.223 n.3655

Abstract : Reflects anger of parents and teachers at 2011 term dates being altered due to the Rugby World Cup. Raises concerns about the impact of the alterations on students' preparation for exams in term four.

About : [World Cup \(Rugby football\)](#)

Subject : [Education, Secondary Examinations](#)
[Education, Secondary Political aspects](#)

When: [2011 \(September 9 - October 23\)](#)

Rugby World Cup 2011

Rugby World Cup 2011

In : Kōkiri (Online), Har/Pip 2009; n.14:p.46
Newspaper Article

Other version:

#	Source
1	Kōkiri, Har/Pip 2009; n.14:p.46

Abstract : Ka whakatakotoria te urunga atu a Ngāi māori ki ngā whakamaheretanga mō te Rugby World Cup.
Details the Māori involvement in Rugby World Cup planning.

Subject : [Rugby Union football Tournaments](#)
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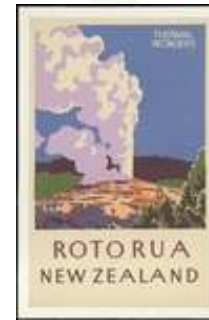
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- Celebrating 25 years of INNZ online
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- Release of data under NZGoal

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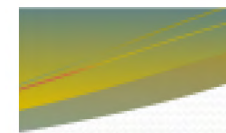
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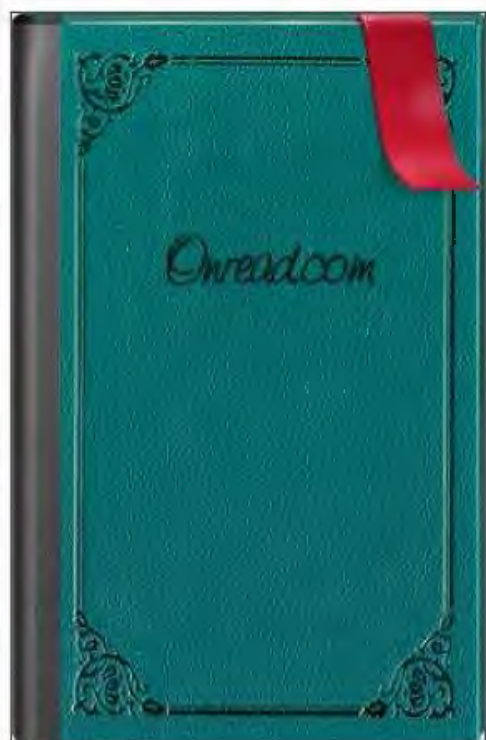
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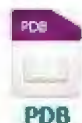
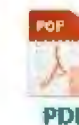
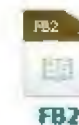
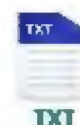


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      This volume will therefore be one of a series.</para>
    <para role="indent">As the demand for the Handbook was largely in excess of the number
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      would bear repetition. But there is a large quantity of completely new matter introduced
      into this book, especially in the portions relating to agriculture, sheep-farming,
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      thermal springs, land- and income-tax methods, &#x0026;c. Of the articles dealing with
      these subjects, some appear for the first time, while others have been re-written and
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THE NEW ZEALAND OFFICIAL YEAR - BOOK 1893

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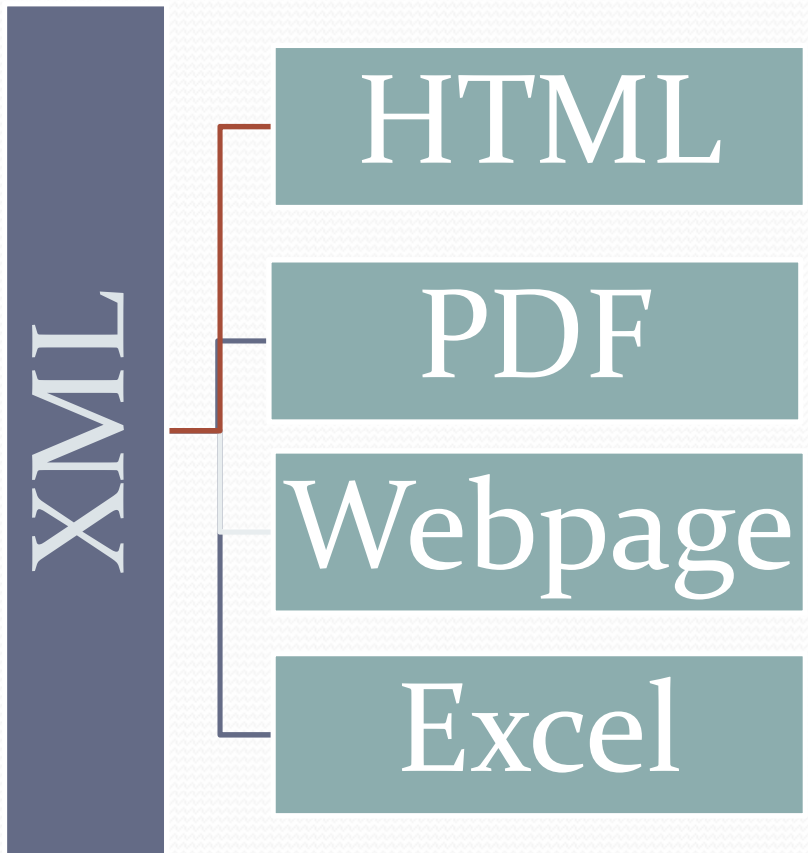
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Creation role:	070 author comp writer of accompanying material
Related names:	Bigwood, Jean Bigwood, Kenneth McNaughton, Howard (Howard Douglas) Millar, Paul Shadbolt, Timothy Richard Taylor, Eric Weir, J. E. (John Edward; 1935-) Weir, J.E. Weir, J.E. (John E.) Westra, Ans
Titles:	Aspects of poetry in New Zealand Autumn testament ballad of calvary street, the ballad of the soap powder lock-out, the Baxter basics Beyond the palisade, 1944. blow, wind of fruitfulness bone chanter, The : unpublished poems, 1945-72 Bone chanterunpublished poems 1945-72, The bureaucrat, the chosen poems Cold springBaxter's unpublished early collection Collected plays Collected poems Collected poems of James K. Baxter

About: James K. Baxter

An Entity of Type : artist, from Named Graph : <http://live.dbpedia.org>, within Data Space : live.dbpedia.org



James Keir Baxter (29 June 1926 – 22 October 1972) was a poet, and is a celebrated figure in New Zealand society.

Property	Value
dbpedia-owl:abstract	<ul style="list-style-type: none">James Keir Baxter (29 June 1926 – 22 October 1972) was a poet, and is a celebrated figure in New Zealand society.
dbpedia-owl:birthDate	<ul style="list-style-type: none">1926-06-29 (xsd:date)1926-06-29 (xsd:date)–06-29
dbpedia-owl:birthPlace	<ul style="list-style-type: none">dbpedia:New_Zealanddbpedia:Dunedin
dbpedia-owl:birthYear	<ul style="list-style-type: none">1926-01-01 00:00:00 (xsd:date)1926-01-01 00:00:00 (xsd:date)
dbpedia-owl:deathDate	<ul style="list-style-type: none">1972-10-22 (xsd:date)1972-10-22 (xsd:date)
dbpedia-owl:deathPlace	<ul style="list-style-type: none">dbpedia:Aucklanddbpedia:New_Zealand
dbpedia-owl:deathYear	<ul style="list-style-type: none">1972-01-01 00:00:00 (xsd:date)1972-01-01 00:00:00 (xsd:date)
dbpedia-owl:nationality	<ul style="list-style-type: none">dbpedia:New_Zealand
dbpedia-owl:occupation	<ul style="list-style-type: none">dbpedia:James_K_Baxter__1
dbpedia-owl:stateOfOrigin	<ul style="list-style-type: none">dbpedia:New_Zealand
dbpedia-owl:thumbnail	<ul style="list-style-type: none">http://upload.wikimedia.org/wikipedia/commons/thumb/c/c1/Baxter1971LloydGodman.jpg/200px-Baxter1971LloydGodman.jpg
dbpedia-owl:wikiPageExternalLink	<ul style="list-style-type: none">http://www.nzetc.org/tm/scholarly/tei-Whi021Kota-t1-g1-t2.html#name-120491-1http://www.nzetc.org/tm/scholarly/tei-Whi022Kota-t1-g1-t3.htmlhttp://www.vuw.ac.nz/modernletters/bnzp/2001/baxternote.html
dbpprop:alternativeNames	<ul style="list-style-type: none">Baxter, James K.
dbpprop:birthDate	<ul style="list-style-type: none">1926-06-29 (xsd:date)1926-06-29 (xsd:date)
dbpprop:birthPlace	<ul style="list-style-type: none">dbpedia:New_Zealanddbpedia:Dunedin
dbpprop:caption	<ul style="list-style-type: none">James K. Baxter



Competition

Claire Stent



Why competition?

- Different models for retrieving information
- More agile, responsive to user needs
- Better resources



Who/what is the competition?

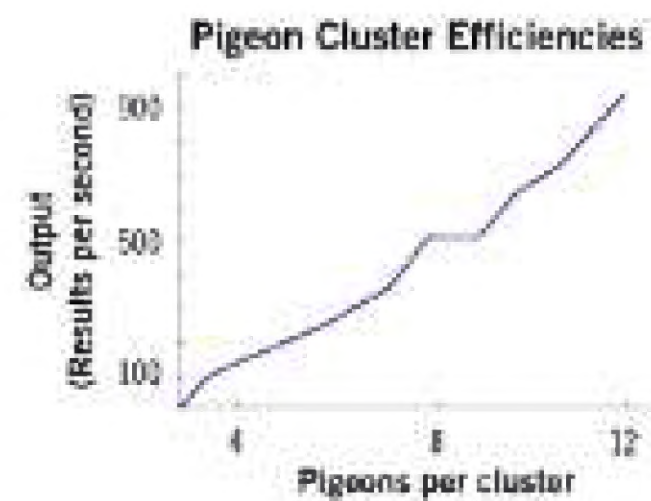
- Google
- Commercial app developers
- Folksonomies and crowd sourcing





Why is Google Competition?

- Based on user behaviour and location
- [Result algorithm](#)
- Huge resources
 - Google has continually managed to hire 90% of the best search-engine people in the world Brian Davison



Attractions

Search



Location

Best Nearby

Available when in Seoul

Best in Seoul



Hongdae

Neighborhood



Near My Home Base





Why are they competition?

- Commercial imperative to meet user needs
- Agile methodology for updates
- Targeted resources

historyp'n






A global community collaborating around history



Fullscreen

222,914

materials and memories have been pinned
by 44,565 users and 1,051 institutions

-  kathleen curran11 favoured St. John's College Lewis Avenue 1870-1958
-  derby has added a comment about Derby from the hill
-  derby has added a comment about Early Derby
-  derby has added a comment about Bridge across to Briseis Tin Mine
-  THE DOWNTOWN HUB has pinned CPF Along Pacific Avenue 1884

Explore where you live...

Enter a location

Go

Pinning The Queen's history

Have you celebrated a Royal Jubilee over the past 60 years or even seen a Royal visit?



Me and my Chevy

Share your memories of your first cars, family holidays, road trips and more.



Amazing Grandparents

Is your Gran, Grandad, Nan or Pops awesome? Add your grandparents to our Hall of Fame.





Crowdsourcing

- Relies on experts as well as interested amateurs
- Quick updating and correcting
- Very large number of people involved
 - History Pin has 222,914 materials and memories pinned by 44,565 users and 1,051 institutions
- Examples:
 - [Dutch Vele Handan/City of Amsterdam](#)
 - [French Archives WWI](#)

What can I use my skills for?

Trish O'Kane

What kind of chicken are you?



Battery



Barn



Free-range





Things change.....

- **Agriculture then** - Farm workers
- **Now** - off the farm
 - Mechanics
 - Equipment builders
 - Scientists
 - Feed producers
 - Breeders
 - Fertiliser/pesticide producers
 -



Our career paths

- Claire
- Trish



Professions change

- Librarian Cataloguers
- Now
 - System analysts
 - Database Administrators
 - Data Librarians
 - Digital Archivists
 - Data Migration Contractors
 - Library System Administrators
 - ...
- Records managers
- Now
 - EDRMS database administrator
 - Digital archivists
 - Business analysts
 - Information architects
 - Taxonomy/Ontology builder
 - Metadata schema builder
 -



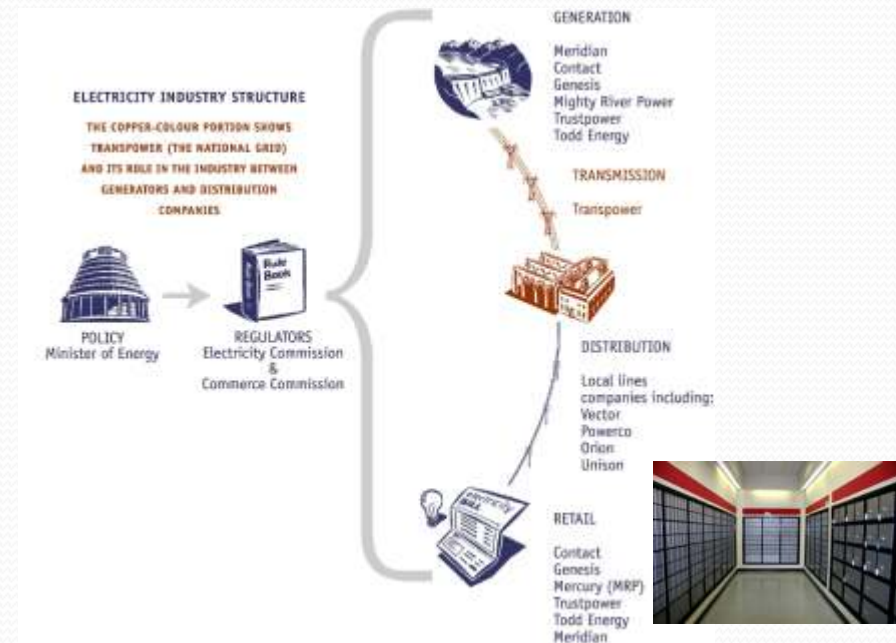
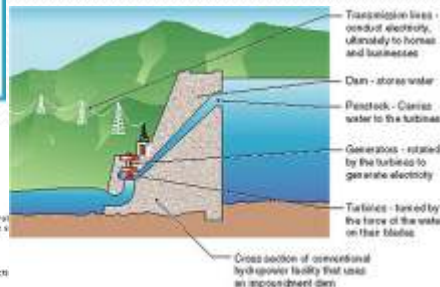
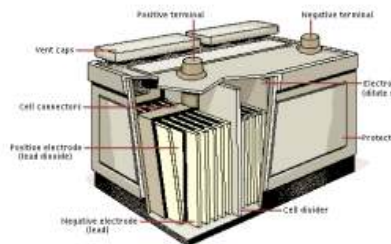
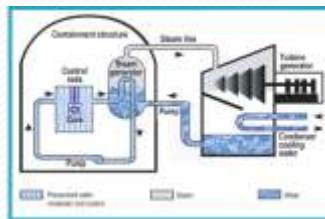
What about new skills?

Trish O'Kane



Invisible systems

We don't care how electricity is... generated, stored, or transmitted



Something
you don't *see* in cars anymore



Case study: Electronic Text Centre

Trish O'Kane

An example of some of the huge number of linkages and cross-references between texts in the collection.

Two of the texts included in the NZETC online collection are James Cowan's "New Zealand Wars" and Elsdon Best's "The Maori As He Was". Both contain drawings of the Ngati Toa leader Te Rangiheaeta. Six other texts in the collection make reference to Te Rangihaeata. The portrait included in Chapter Three of Cowan's history was drawn by Charles Heaphy. There are two other sketches by Heaphy in two other texts in the collection.

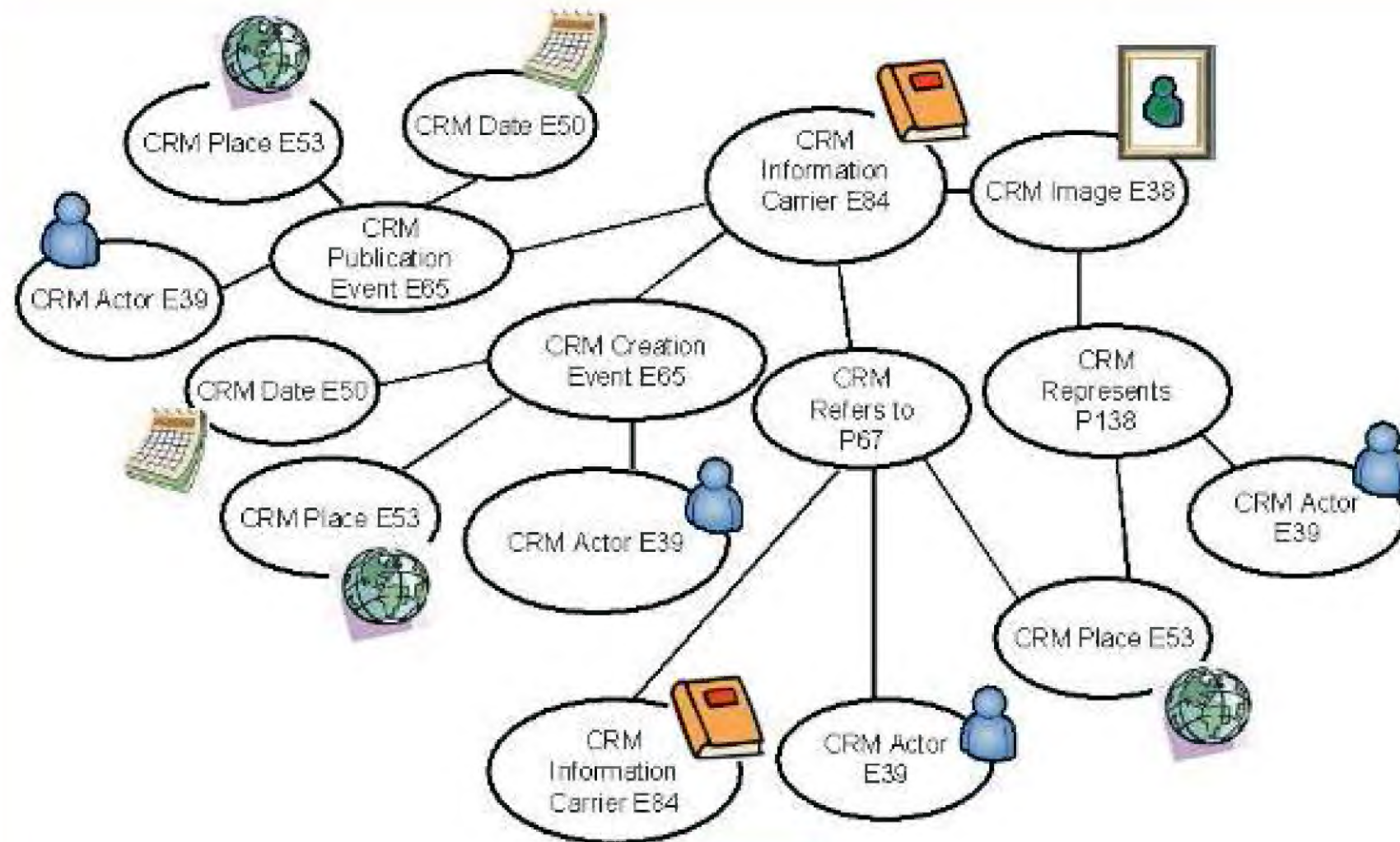
Furthermore Heaphy's actions in the Taranaki War are described in A. J. Harrop's "England and the Maori Wars" and Heaphy is referred to as the source of information on traditional Maori bird-hunting spears in Best's "The Maori Volume 2". Harrop's bibliography includes texts by both Cowan and Best. There are six texts by Best in the NZETC collection, one of which was published by R. E. Owen who also published Cowan's "New Zealand Wars".



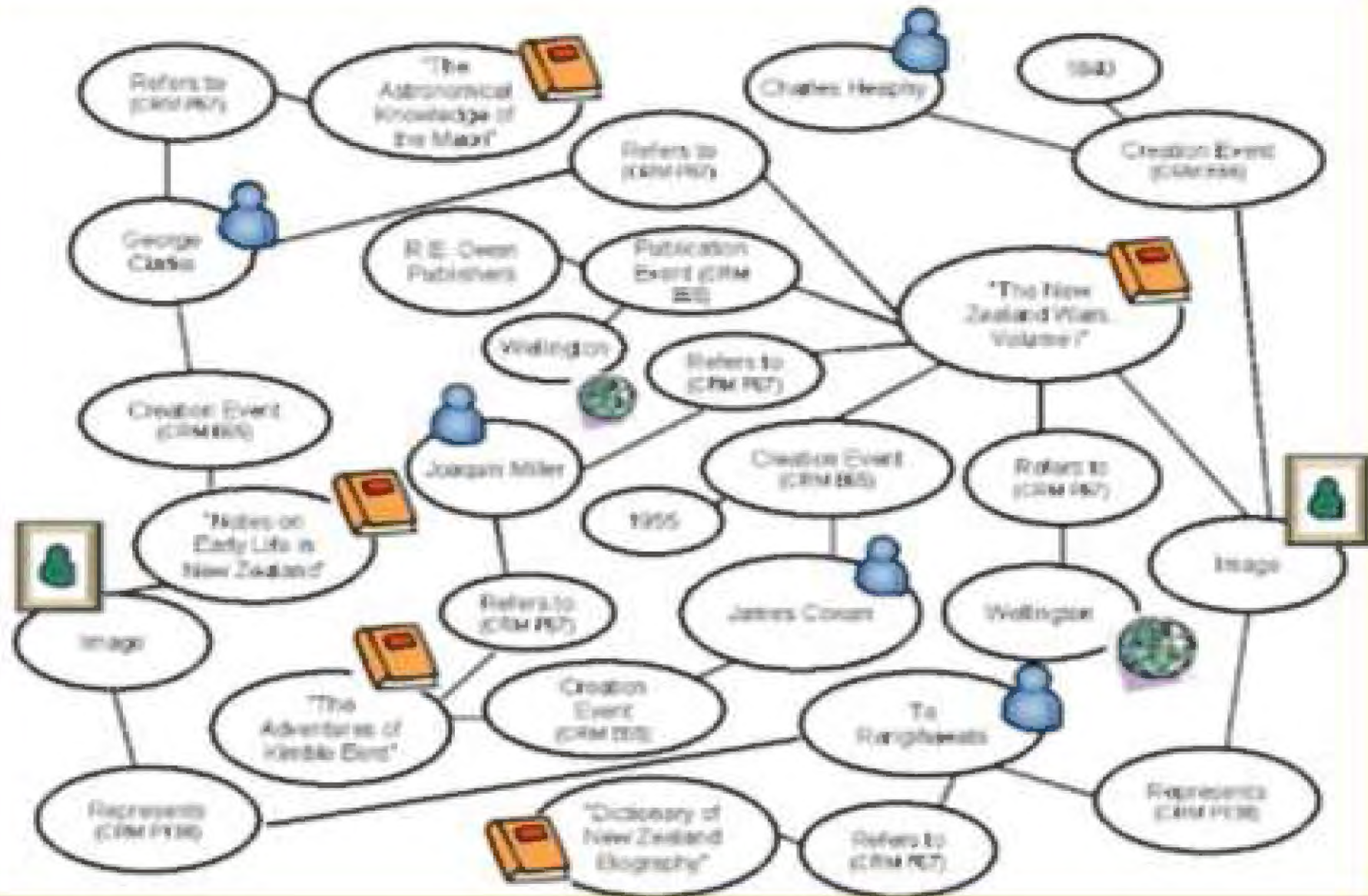
An analysis of the collection allows identification of various topics of interest. Topics in the NZETC digital library represent authors and publishers, books, chapters, images, as well as people and places mentioned in those books, chapters, and images.



Topics of interest and the relationships between them are codified using an existing ontology, in this case the CIDOC-CRM.



Information from the texts is harvested into this framework creating a fully connected and traversable collection.





Time to learn/discuss



Choose 2

1. **Beyond the book**

- XML
- Linked data

2. **Competition**

- Semantic web
- Crowdsourcing and folksonomies

3. **What can I use my skills for?**

- Income streams
- Jobs
- What I like doing



XML exposed

Claire Stent



What is XML?





Fielders Sponge Cake

Ingredients

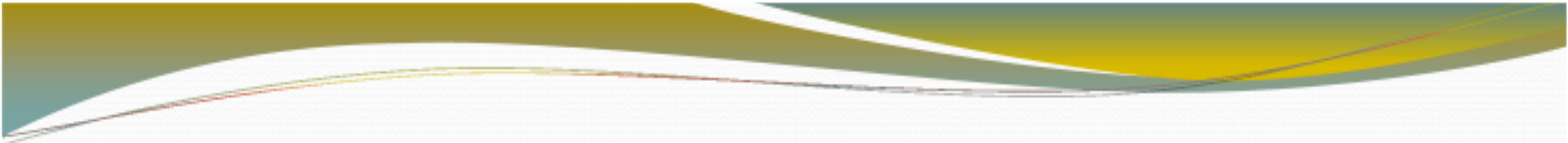
- 3 eggs
- pinch salt
- 1/4 teaspoon vanilla essence
- 1/2 cup caster sugar
- 2/3 cup cornflour
- 1 tablespoon flour
- 1 teaspoon baking powder

Method

- Separate the eggs

XML Structure

- Describe content by using elements
`<title>Fielders Sponge Cake</title>`
- Enhance elements by using attributes
`<ingredient amount="3" name="eggs"/>`
- Structure content by nesting elements
`<recipe>`
 `<title>Fielders Sponge Cake</title>`
`</recipe>`



```
<recipe>
  <title>Fielders Sponge Cake</title>
  <ingredients>
    <ingredient amount="3" name="eggs"/>
    <ingredient amount="1/2 cup" name="sugar"/>
    <ingredient amount="pinch" name="salt"/>
    <ingredient amount="2/3 cup" name="cornflour"/>
    <ingredient amount="1 tablespoon" name="flour"/>
    <ingredient amount="1 teaspoon" name="baking powder"/>
  </ingredients>
  <method>Separate the eggs</method>
</recipe>
```





Content Guides

- Pinch means amount you can hold between fingers
- Metric measures
- Celsius oven temperature



Schemas

- Simple
 - Saying what elements should be there
- Complex
 - Sets out the order of the elements
 - Determines which elements are mandatory









Stylesheets (XSLT)

- Enable the transformation of the XML data
 - Into html, pdf, csv
- Can be created using any text editor
- May need software to run the stylesheet
 - XML editing software
- .xsl

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<!-- Edited by XMLSpy® -->
<html xsl:version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
xmlns="http://www.w3.org/1999/xhtml">
  <body style="font-family:Arial;font-size:12pt;background-
color:#EEEEEE">
    <xsl:for-each select="recipe_book/recipe">
      <div style="background-
color:blue;color:white;padding:4px">
        </div>
        <div style="margin-left:20px;margin-bottom:1em;font-
size:10pt">
          <xsl:value-of select="title"/>
        </div>
      </xsl:for-each>
    </body>
  </html>
```



Putting it all together

- Xml has a structure
- XML has human readable elements
- Schemas provide rules for structure
- Stylesheet enable re-use in other formats



View XML in action



RSS Feeds

```

<?xml version="1.0" encoding="utf-8"?>
<rss version="2.0" xmlns:atom="http://www.w3.org/2005/Atom"
xmlns:cf="http://www.microsoft.com/schemas/rss/core/2005"
xmlns:dc="http://purl.org/dc/elements/1.1/"><channel
xmlns:cfi="http://www.microsoft.com/schemas/rss/core/2005/internal" cfi:lastdownloaderror="None"><title
cf:type="text">CAKE-RECIPE at Yahoo! Groups</title><link>http://groups.yahoo.com/group/CAKE-
RECIPE/</link><description cf:type="text">Archive for any type of cake recipe.</description><item><title
xmlns:cf="http://www.microsoft.com/schemas/rss/core/2005" cf:type="text">Peanut Butter & Chocolate
Cake</title><pubDate>Fri, 13 Jan 2012 15:29:37 GMT</pubDate><atom:published
xmlns:atom="http://www.w3.org/2005/Atom">2012-01-13T15:29:37Z</atom:published><atom:updated
xmlns:atom="http://www.w3.org/2005/Atom">2012-01-13T15:29:37Z</atom:updated><author>Virginia
Butterfield</author><atom:author xmlns:atom="http://www.w3.org/2005/Atom"><atom:name>Virginia
Butterfield</atom:name></atom:author><link>http://groups.yahoo.com/group/CAKE-
RECIPE/message/6706</link><guid isPermaLink="true">http://groups.yahoo.com/group/CAKE-
RECIPE/message/6706</guid><description xmlns:cf="http://www.microsoft.com/schemas/rss/core/2005"
cf:type="html">Peanut Butter & Chocolate Cake By Amy from Illinois Overall Rating Description
This cake is a big hit with anyone. All chocolate and peanut butter lovers
watch</description><cfi:id>14</cfi:id><cfi:effectiveId>409774336</cfi:effectiveId><cfi:read>true</cfi:read><cfi:do
wnloadurl>http://rss.groups.yahoo.com/group/

```

CAKE-RECIPE at Yahoo! Groups

Peanut Butter & Chocolate Cake

Saturday, 14 January 2012, 4:29:37 AM | Virginia Butterfield →

Peanut Butter & Chocolate Cake By Amy from Illinois Overall Rating Description This cake is a big hit with anyone. All chocolate and peanut butter lovers watch

Milky Way Cake

Wednesday, 11 January 2012, 7:29:27 AM | Virginia Butterfield →

Milky Way Cake By Dutchie Description Rich moist cake for all you chocolate milky way lovers out there. A great thing for your sweet tooth. Ingredients 8 (2.1

Cheater's Homemade Pineapple Cake

Wednesday, 11 January 2012, 7:28:33 AM | Virginia Butterfield →

Cheater's Homemade Pineapple Cake By Jelene Jackson Description A delicious sweet dessert. Ingredients 1 yellow cake mix 3 eggs 1/2 cup milk 1 stick butter 1

BEER AND KRAUT FUDGE CAKE

Tuesday, 10 January 2012, 8:05:42 AM | Virginia Butterfield →

BEER AND KRAUT FUDGE CAKE Read more about it at www.cooks.com/rec/view/0,166,159187-235204,00.html Content Copyright © 2012 Cooks.com - All rights reserved.

GERMAN BEER COFFEE CAKE

Tuesday, 10 January 2012, 8:05:04 AM | Virginia Butterfield →

GERMAN BEER COFFEE CAKE Read more about it at www.cooks.com/rec/view/0,1918,146185-240198,00.html Content Copyright © 2012 Cooks.com - All rights reserved. 3

Chocolate Kahula Cake (from EverSave)

Monday, 9 January 2012, 7:18:45 AM | Virginia Butterfield →

Chocolate Kahula Cake By Barbara Rose Farber Description Totally decadent, and rich, one Bundt cake will serve 18 people. This cake is so easy, yet those you



Digital books



New Zealand Official Yearbook

```

<thead>
  <row>
    <entry align="center" valign="middle">Colony.</entry>
    <entry align="center" valign="middle">Arrivals, 1893.</entry>
    <entry align="center" valign="middle">Departures, 1893.</entry>
    <entry align="center" valign="middle">Excess of Arrivals over
      Departures, 1893.</entry>
  </row>
</thead>
<tfoot>
  <row>
    <entry align="left" namest="col1" nameend="col4">
      <para>* Including estimated number of unrecorded
        departures.</para>
      <para><superscript>&#x2020;</superscript> Excess of
        departures.</para>
    </entry>
  </row>
</tfoot>
<tbody>
  <row>
    <entry>Queensland</entry>
    <entry>22,007</entry>
    <entry>19,704</entry>
    <entry>2,303</entry>
  </row>

```

	Square Miles.
Queensland	668,497
New South Wales	310,700
Victoria	87,884
South Australia	903,425
Western Australia	1,060,000
Total Continent of Australia	3,030,506
Tasmania	26,215
New Zealand (including the Chatham and other islands)	104,471
Total Australasia	3,161,192

, Square Miles.

Queensland, "668,497"

New South Wales, "310,700"

Victoria, "87,884"

South Australia, "903,425"

Western Australia, "1,060,000"

Total Continent of Australia, "3,030,506"

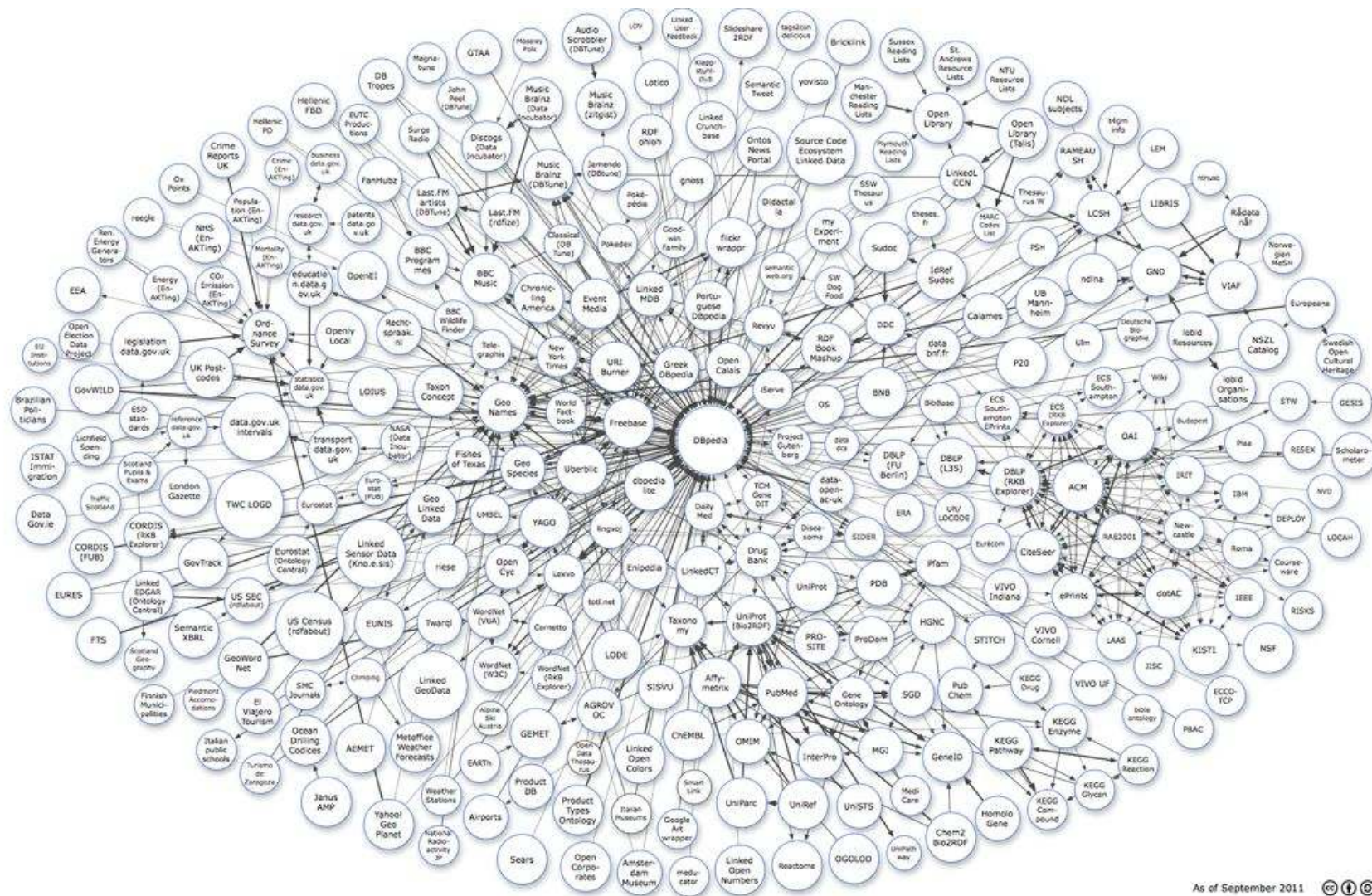
Tasmania, "26,215"

New Zealand (including the Chatham and other islands), "104,471"

Total Australasia, "3,161,192"



What else?



About: Geoff Bascand

An Entity in Data Space: dbpedia.org

Geoff Bascand is the current Government Statistician of New Zealand and the Chief Executive of Statistics New Zealand. He was appointed to these positions on 22 May 2007.

Property	Value
dbpprop:abstract	Geoff Bascand is the current Government Statistician of New Zealand and the Chief Executive of Statistics New Zealand. He was appointed to these positions on 22 May 2007.
dbpprop:after	-
dbpprop:before	dbpedia:Brian_Pink
dbpprop:hasPhotoCollection	http://www4.wiwiwiss-fu-berlin.de/flickrwrappr/photos/Geoff_Bascand
dbpprop:reference	http://www.ssc.govt.nz/appt-ce-stats-may07 http://www.beehive.govt.nz/ViewDocument.aspx?DocumentID=22219 http://www2.stats.govt.nz/domino/external/pasfull/pasfull.nsf/00c9e0a06fee31764c2568470008f782/4c2567ef00247c6acc256ec4000141fc?OpenDocument
dbpprop:title	Government Statistician, New Zealand
dbpprop:wikiPageUsesTemplate	dbpedia:Template:succession_box
dbpprop:years	2007 –
rdf:type	yago:NewZealandMathematicians yago:NewZealandPublicServants yago:LivingPeople yago:AustralianNationalUniversityAlumni yago:Statisticians
rdfs:comment	Geoff Bascand is the current Government Statistician of New Zealand and the Chief Executive of Statistics New Zealand. He was appointed to these positions on 22 May 2007.
rdfs:label	Geoff Bascand
owl:sameAs	freebase:Geoff Bascand http://umbel.org/umbel/ne/wikipedia/Geoff_Bascand
skos:subject	category:Australian National University alumni

1976 Census of Population and Dwellings

Holdings information

1976 Census of Population and Dwellings is held in the Data Archive under ID number 5086

Concepts

Age groups
Education
Ethnic groups
Geographic areas
Income
Population
Religion
Sex

Production

Producer:

Department of Statistics

Contributor(s):

Department of Statistics

Abstract:

The 26th Census of Population and Dwellings for New Zealand was conducted on the night of 23 March 1976, under the authority of the Statistics Act 1975, which provides for a regular five-yearly census. The 1976 Census related solely to 'Geographic New Zealand', excluding the population of the island territory of Tokelau. Visitors to New Zealand from overseas were included in the de facto census counts. Information asked for via the personal questionnaire included age, sex, location, household relationships, country of birth, ethnic origin, religion, income, marital status, fertility, occupation, travel to work, education and training, social security benefits, and smoking. Information asked for via the dwelling questionnaire included dwelling construction, heating, number of rooms/bedrooms, tenure, and amenities.

Coverage

Time period covered:

23 March 1976 – 23 March 1976

Geographic coverage:

New Zealand

Geographic unit(s):

Meshblock, area unit, local authority, statistical area, statistical division, general electoral district, Māori electoral district, geographic county

Observation unit(s):

Individuals, dwellings, households

Universe (inclusion):

The census included 100 percent of people present in New Zealand on census night. It also included 100 percent of occupied and unoccupied dwellings and dwellings under construction in New Zealand on census night.

Universe (exclusion):

The population of the island territory of Tokelau

Credits

<http://www.flickr.com/photos/78528924@Noo/4139762579/> Sponge

<http://www.flickr.com/photos/nananio/5647953541/> (Fail)

<http://www.flickr.com/photos/chiotrun/3968556531/> (Lamingtons)

<http://www.flickr.com/photos/oatsy40/6375360483/> (Cupcakes)

<http://www.flickr.com/photos/sweetfacecakes/6191531573/sizes/l/in/photostream/> (Transformer)

<http://richard.cyganiak.de/2007/10/lod/>

[dbpedia.org/resource/Geoff **Bascand**](http://dbpedia.org/resource/Geoff_Bascand)



Questions



Linked data: a new way to navigate

Claire Stent



What is Linked data?



<http://www.flickr.com/photos/docsearls/5500714140/>



<http://www.flickr.com/photos/kitkaphotogirl/8542003197/>





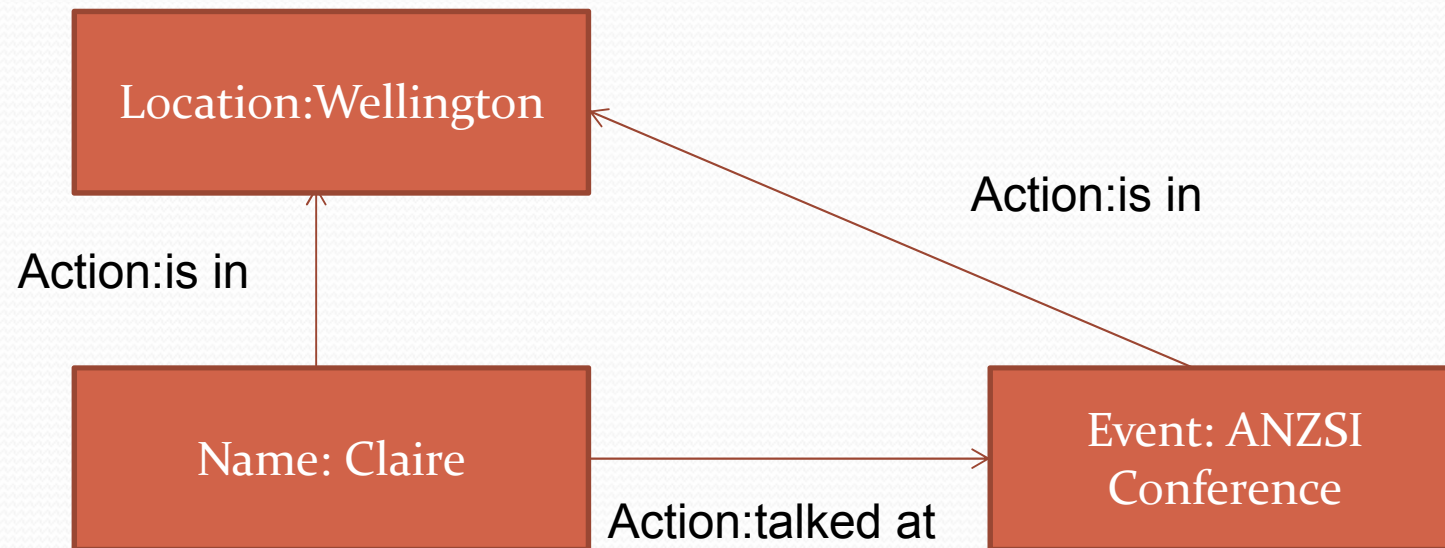
Linked data: standards

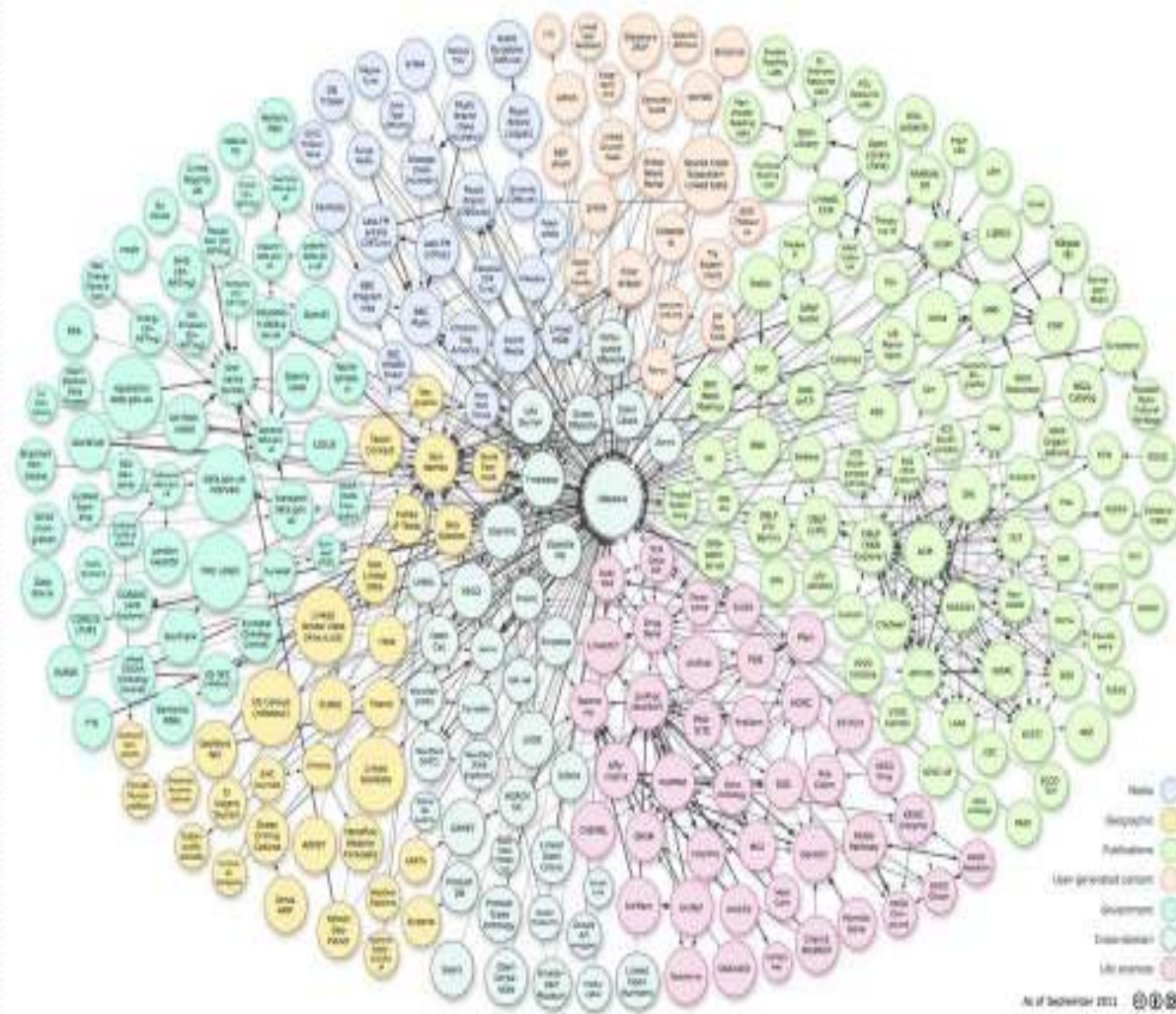
- Use URIs as names for things
- Use HTTP URIs so people can find things
- Provide useful information when someone uses a URI
 - Resource Description Framework
- Include links so people can find out more

Tim Berners Lee

RDF

- Coded in standardised language
- “Triples” structure
 - Subject Predicate Object
 - Claire is the presenter
 - Claire talked at ANSI conference 2013
 - ANZSI is in Wellington







How do you get all the links?

VIAF

- [Library of Congress / NACO \(Name Authority Cooperative Program of the PCC\)](#) *
- [Deutsche Nationalbibliothek](#) (German National Library)
- [Bibliothèque nationale de France](#) (National Library of France)
- [Kungliga biblioteket - Sveriges nationalbibliotek](#) (National Library of Sweden)
- [National Library of Australia](#)
- [Biblioteca Nacional de España](#) (National Library of Spain)
- [Biblioteca Nacional de Portugal](#) (National Library of Portugal)
- [Istituto Centrale per il Catalogo Unico delle biblioteche italiane e per le informazioni bibliografiche \(ICCU\)](#) (Central Institute for the Union Catalogue of the Italian libraries and bibliographic information)
- [Národní knihovna České republiky](#) (National Library of the Czech Republic)
- [הספרייה הלאומית](#) National Library of Israel
- [Bibliotheca Alexandrina](#) (Library of Alexandria)
- [Bibliotheca Apostolica Vaticana](#) (Vatican Library)
- [Swiss National Library | Schweizerische Nationalbibliothek | Bibliothèque nationale suisse | Biblioteca nazionale svizzera](#)
- [Library and Archives Canada | Bibliothèque et Archives Canada](#)
- [Getty Research Institute](#)
- [Centrum NUKAT Biblioteki Uniwersyteckiej w Warszawie](#) (NUKAT Center of Warsaw University Library)
- [Országos Széchényi Könyvtár](#) (National Széchényi Library)
- [RERO—Réseau des bibliothèques de Suisse occidentale](#) (Library Network of Western Switzerland)
- [Système Universitaire de Documentation \(Sudoc\)](#) (University Documentation System)
- [Brussel Netwerk Openbare bibliotheken \(BrNO\)](#) (Brussels network of Flemish public libraries)
- [Российской государственной библиотеки](#) (Russian State Library)
- [BIBSYS](#) +
- * Additional national libraries participating through NACO:
- [Biblioteca Nacional de México](#) (National Library of Mexico)
- [British Library](#)
- [Llyfrgell Genedlaethol Cymru | National Library of Wales](#)
- [National Agricultural Library](#)
- [National Library of Medicine](#)
- [National Library of New Zealand | Te Puna Mātauranga o Aotearoa](#)
- [National Library of Scotland](#)
- [National Library of South Africa](#)
- + National library participating through BIBSYS:
- [Nasjonalbiblioteket](#) (National Library of Norway)

VIAF

Virtual International Authority File

Search

Select Field:

All Headings

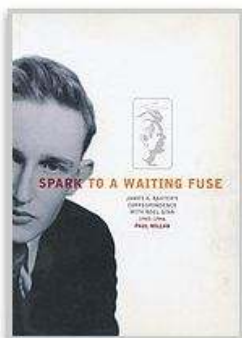
Select Index:

All VIAF

Search Terms:

James K Baxter

Search



Baxter, James K.

Baxter, James K., 1926-1972

Baxter, James K. (James Keir), 1926-1972

Baxter, James Keir

VIAF ID: 4945723 (Personal)

Permalink: <http://viaf.org/viaf/4945723>

Preferred Forms

200 _ | [1a Baxter](#) [1b James K.](#) [1f 1926-1972](#)

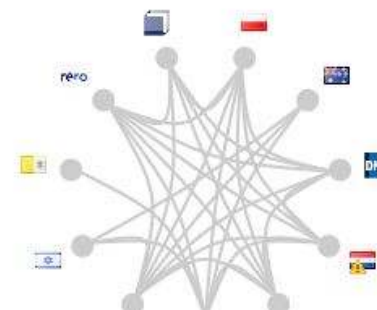
100 1 _ | [1a Baxter, James K.](#) [1q \(James Keir\).](#) [1d 1926-1972](#)

100 1 _ | [1a Baxter, James K.](#) [1d 1926-1972](#)

100 1 _ | [1a Baxter, James K.](#)

100 1 _ | [1a Baxter, James K.](#) [1d \(1926-1972\).](#)

worldcat.org/search?q=isbn:086473400X [James K., 1d 1926-1972](#)





ISNI

- International Standard Name Identifier
 - Trade sources
 - Text rights bodies
 - Music rights bodies
 - Encyclopedias
 - Researchers and Professional Bodies

james k baxter

search more



User id: ISNI | [log in](#) | [logout](#)

Examples: Prince; Princeton University; Ken Follett; Follett, Ken

shortlist title data search history

1

results search [and] (Any Phrase) james k baxter | 1 hits

labels pica+ marc21

Please help us improve this record

If you have any supplemental information about the identity listed here, please click in this box to go to the contribution form.

Thank you in advance!



ISNI: 0000 0001 1193 3824

Name: **Baxter, James**
Baxter, James K.
Baxter, James K. (James Keir)
Baxter, James Keir

Dates: 1926-1972

Creation class: Language material
Text

Creation role: 070
author
comp
writer of accompanying material

Related names

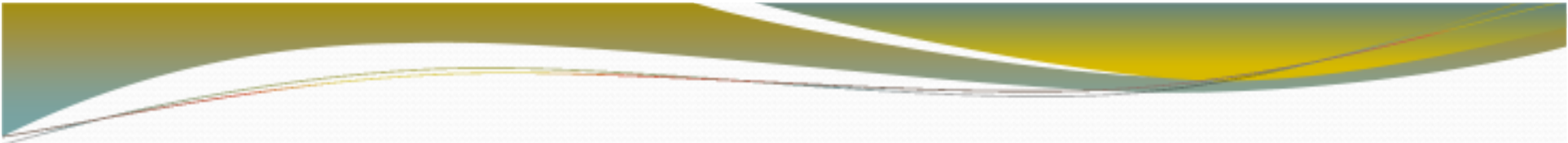
Titles

Sources: [VIAF](#) [BAV](#) [BNF](#) [DNB](#) [LC](#) [NLlat](#) [NTA](#) [NUKAT](#) [RERO](#) [SUDOC](#) [WKP](#)
[BOWKER](#)

1



Then what?

- 
- Joined up vocabularies enhance searching
 - Schema.org is used by search engines like Google
 - Better harvesting
 - OWL is a step towards the semantic web

Search results for 'au:James K Baxter'

☒ Format

- ☒ All Formats (474)
- ☐ Book (222)
 - ☐ eBook (48)
 - ☐ Microform (6)
 - ☐ Thesis/dissertation (1)
- ☐ Article (129)
 - ☐ Chapter (7)
 - ☐ Downloadable article (1)
- ☐ Video (33)
 - ☐ DVD (13)
 - ☐ Film (13)
 - ☐ VHS (8)
 - ☐ eVideo (1)
- ☐ Musical score (25)
- ☐ Music (24)
 - ☐ CD (14)
 - ☐ Cassette (5)
 - ☐ eMusic (3)
 - ☐ LP (2)
- ☐ Audiobook (22)
 - ☐ CD (10)
 - ☐ Cassette (9)
 - ☐ LP (2)
- ☐ Archival material (18)
 - ☐ Downloadable archival material (11)
- ☐ Computer file (3)

Results 1-10 of about 474 (.27 seconds)

<< First < Prev 1 2 3 Next >

[Select All](#) [Clear All](#)

Save to: [New List] ▼

[Save](#)

Sort by: Relevance ▼


[Save Search](#)

1.



[James K. Baxter](#)

by James K Baxter; New Zealand. Learning Media.;

 Audiobook on Cassette : Cassette recording

Language: English

Publisher: Wellington, N.Z. : Learning Media, 1990.

2.



[James K. Baxter](#)

by Vincent O'Sullivan; James K Baxter

 Book

Language: English

Publisher: Wellington ; New York : Oxford University Press, ©1976.

[Editions and formats »](#)

3.



[Collected poems](#)

by James K Baxter; J E Weir

 Book

Language: English

Publisher: Wellington ; New York : Oxford University Press in association with Price Milburn, ©1979.

[Editions and formats »](#)

Linked Data

[More info about Linked Data](#)

<<http://www.worldcat.org/oclc/613161657>>

library:holdingsCount	"2"						
library:oclcnum	"613161657"						
library:placeOfPublication	<table> <tr> <td>rdf:type</td><td>schema:Place</td></tr> <tr> <td>schema:name</td><td>"Christchurch [New Zealand]"</td></tr> </table>	rdf:type	schema:Place	schema:name	"Christchurch [New Zealand]"		
rdf:type	schema:Place						
schema:name	"Christchurch [New Zealand]"						
rdf:type	schema:Book						
schema:about	<table> <tr> <td>madsrdf:isIdentifiedByAuthority</td><td><http://id.loc.gov/authorities/subjects/sh85091520></td></tr> <tr> <td>rdf:type</td><td>skos:Concept</td></tr> <tr> <td>schema:name</td><td>"New Zealand poetry."</td></tr> </table>	madsrdf:isIdentifiedByAuthority	< http://id.loc.gov/authorities/subjects/sh85091520 >	rdf:type	skos:Concept	schema:name	"New Zealand poetry."
madsrdf:isIdentifiedByAuthority	< http://id.loc.gov/authorities/subjects/sh85091520 >						
rdf:type	skos:Concept						
schema:name	"New Zealand poetry."						
schema:about	<p><http://dewey.info/class/NZ8/e21/></p> <table> <tr> <td>rdf:type</td><td>skos:Concept</td></tr> <tr> <td>skos:inScheme</td><td><http://dewey.info/scheme/e21/></td></tr> </table>	rdf:type	skos:Concept	skos:inScheme	< http://dewey.info/scheme/e21/ >		
rdf:type	skos:Concept						
skos:inScheme	< http://dewey.info/scheme/e21/ >						
schema:about	<p><http://id.worldcat.org/fast/1036808></p> <table> <tr> <td>rdf:type</td><td>skos:Concept</td></tr> <tr> <td>schema:name</td><td>"New Zealand poetry"</td></tr> </table>	rdf:type	skos:Concept	schema:name	"New Zealand poetry"		
rdf:type	skos:Concept						
schema:name	"New Zealand poetry"						
schema:author	<p><http://viaf.org/viaf/4945723></p> <table> <tr> <td>madsrdf:isIdentifiedByAuthority</td><td><http://id.loc.gov/authorities/names/n80036719></td></tr> <tr> <td>rdf:type</td><td>schema:Person</td></tr> <tr> <td>schema:name</td><td>"Baxter, James K."</td></tr> </table>	madsrdf:isIdentifiedByAuthority	< http://id.loc.gov/authorities/names/n80036719 >	rdf:type	schema:Person	schema:name	"Baxter, James K."
madsrdf:isIdentifiedByAuthority	< http://id.loc.gov/authorities/names/n80036719 >						
rdf:type	schema:Person						
schema:name	"Baxter, James K."						



Questions

Crowdsourcing

Trish O'Kane

Left Field Solutions

tokane@actrix.co.nz



Crowdsourcing

- Relies on experts as well as interested amateurs
- Quick updating and correcting
- Very large number of people involved
 - History Pin has 222,914 materials and memories pinned by 44,565 users and 1,051 institutions
- Examples:
 - [Dutch Vele Handan/City of Amsterdam](#)
 - [French Archives WWI](#)



VeleHanden



- VeleHanden = Many hands
- ‘VeleHanden - Public-private partnership between Amsterdam City Archives and Pictura, a commercial digitisation company in The Netherlands
 - Pictura actually owns the *VeleHanden* website,
 - An archive service has to pay a scaleable service fee to use *VeleHanden*,
 - Pictura develops needed functionality in dialogue with the archival institution.
 - The archive service retains control over digital images and any metadata created by the volunteers during the project.
- Crowdsourcing’ information from archive documents

+ Velehanden – who was involved

- 1389 volunteer members
Over 9 months,
16 person-years
contributed

VeleHanden Production Statistics

Project	Extent	Indexing Activity	Duration
Militia Registers	283,732 scans	1,532,643 records	253 days
Population Registers	236,640 scans	367,443 records	91 days
Missing Links	84.455 scans	22.485 records	36 days

VeleHanden *maken licht werk*

Home Projecten Leden Forum Nieuws Help

VeleHanden > Projecten > Missing Links

Missing Links

Het project Missing Links is een initiatief van het Regionaal Archief Leiden. Het is heel anders dan de eerste projecten van Vele Handen, waarbij de nadruk ligt op het samen maken van een index. De naamindex op personen is namelijk al jaren op de site van het archief te vinden en sinds 2010 waren ook de scans van de delen integraal beschikbaar.

Wat ontbrak was een koppeling tussen de beide gegevens. Wel was er een koppeling tussen een record uit de index en het register waarin het record werd vermeld, maar het was noodzakelijk om het hele deel na te kijken.

Het doel van dit project is om de door vele vrijwilligers gemaakte database te koppelen aan de exacte afbeelding uit een register. Een onderzoeker zal daardoor direct bij het gewenste record uitkomen.

Standaard zoeken

Totaal aantal scans:
Dubbel ingevoerd:
Totaal gecontroleerd:
Totaal onbruikbaar:

[Bekijk alle statistieken](#)

Aan de slag:
[Download de instructies](#)

[Meedoen](#)

U bent hier: [Home](#) > [Projecten](#) > [Missing Links](#)



VeleHanden – quality control



- Quality control:
 - 2 people independently enter data (used to use 5 for entry)
 - 3rd person checks
 - Escalate problems to project leader
- See Ben W. Branford
“Quality control for crowd sourced transcription”, March 2012
<http://manuscripttranscription.blogspot.co.nz/2012/03/quality-control-for-crowdsourced.html>
- Living with errors
 - Impossible years of birth – have to record accurately what was written (*hmmmmm*)
 - Go back to main purpose – help to find people and provide access
- A lot of IT design and build work to ease the process

VeleHanden Participants

	Men	Women	No sex	
<20	2	2	0	
20-50	143	141	18	
50-70	355	166	67	
>70	78	17	17	
No age	113	114	156	
Total	691	440	258	1389

+ Role of the archivist



- Role of the archivist:
 - Say “thank you” to volunteers (they are paid a pittance)
 - Gatekeeper – facilitator
 - Focus on the nature and purpose of archival description
 - Finding Aid – making sense of archives
 - Singular responsibility – coordination of a network of contributors
 - Facilitate access and promote understanding
 - Structuring, filtering and creating new knowledge around archives

<http://www.ica2012.com/files/data/Full%20papers%20upload/ica12Final00271.pdf>



Un département,
des énergies partagées

Mémoires de la Somme

Archives en ligne

Archives, plans, images, livres, journaux, enregistrements sonores et audiovisuels : plusieurs millions de pages et de documents à voir et à explorer.



Recherche Simple

OK

[Recherche avancée](#)

Recherches thématiques

État civil
Recensements
Plans
Images
Livres / Presse
Patrimoine
Témoignages
Grande Guerre

AIDE

- Naviguer sur ce portail
- English Guide
- Copie et utilisation des documents

Les Archives départementales de la Somme

Infos pratiques, inventaires, expositions, venir sur place pour une recherche...

► [En savoir plus ...](#)

Les partenaires

► [En savoir plus ...](#)

+ The French Archives and the commemoration of World War I

- Huge project –
 - WW1 saw massive displacement of people into France
 - “Total war” so all archives of the time are facets of the war
 - 8 millions lists of birth records, **100 French departments (!!!)**
- River of time
 - Archivist goes upstream and downstream
- Sharing
 - Australia 400,000 soldiers – lists digitised
 - Dept of Somme in Picardy shares with Australian War Memorial
 - University of Melbourne holds letters from Aus soldiers in France
 - Letters translated into French, shared with villages mentioned

+ The French Archives and the commemoration of World War I

- www.archivesportaleurope.eu
- www.awm.gov.au
- www.archives.somme.fr

From 2013 ANZSI Conference – Intrepid indexing: indexing without boundaries

Future Electronic Indexing

Introduction to XML

We are in an age where we are moving from paper, to PDFs, to other formats, and these formats will be facilitated by XML, which is just one of several mark-up languages. Use of XML requires style sheets (or manuals), so people can enter information (data) consistently.

An example is the *NZ Official Yearbook*. Such publications are no longer presented in their entirety; their content can be updated and added to continually from various quarters.

Linked Data

XML enables linked data, which people can use to move from one point in a document to another, i.e., to navigate. For example, a library record about James K. Baxter will contain links to information about him, and links to his books, and to other areas as well. So the reader is moving from the original heading to... who knows where?

Before linked data, information sat in silos that each had their own store of information. Now the information is being taken out of the silos. All links have unique numbers; these numbers should be searchable; and these links should lead to other links. This results in a very rich environment.

Organisations such as VIAF (Virtual Information Authority Files) link up information from libraries around the world. People can use VIAF to access the records of numerous libraries, finding such information as in the above example of the James K. Baxter.

ISNIs (international standard name identifiers) are a method for uniquely identifying the public identities of contributors to media content. Each person has a unique number. ISNI is a tool for disambiguating names that might otherwise be confused, and will link the data about names that are collected and used in all sectors of the media industries. To make these numbers, name information can be gleaned from trade sources, text rights bodies, and encyclopedias.

Linked data can join up vocabularies and enhance searching. An example is OWL, or Web Ontology Language, which is a family of knowledge representation for authoring ontologies. It is characterised by formal semantics and XML-based serializations for the Semantic Web. OWL has attracted academic, medical and commercial interest. WorldCat is another example of a system containing linked data.

Behind the scenes in all these types of systems, organisations and projects people are needed to do authority control, etc., to enable the linked data. That is, it is people, like indexers, who are needed to ensure entries are consistent.

We are now in the century of the algorithm, i.e., the century of logic .

Career development

Claire explained that her career went from cataloguer, to data quality, to training, to systems testing, to metadata, to mapping, to digitising e-books in libraries, and to teaching statisticians how to catalogue (using metadata). Now she might be called a data librarian or information analyst.

Trish began in anthropology and entomology, then went into information management, synthesising information, metadata, information architecture, then system design.

Professions change. Analytical minds will always be needed. The library catalogue might end up becoming a systems analyst. The record manager might end up becoming a business analyst, or information architect, or taxonomy builder.

Systems are becoming invisible. We used to have chokes in cars, but now they are automatic. Even though the choke is now invisible, and not controlled by drivers anymore, it is still working well. The analogy applies to other systems. Electronic indexing and many other tasks still require the skills of an 'invisible' indexer.

When looking at career change, mind mapping is a useful exercise. For example, people could look at whether they enjoy training people, or creating their own jobs, or making an item and licensing it. In other words, they need to ask themselves What sort of chicken am I—a battery hen (employed), a barn chicken (contractor), or free range (choose the types of work they want to do). Indexers could go into such careers as testing, crowdsourcing quality managers, data governance, data quality or digital curation. Employers will hire more on aptitude and attitude than experience. People should also look at how they like to spend their time, as well as their values. Do they value relationships, generosity, boundaries, direction, analysis, timeframes? Other factors to look at are whether they want to work full time or part time.

Crowdsourcing

One example of crowdsourcing is the Dutch *Velehanden* website that created archival documents from military registers, in which 1389 volunteers in 9 months produced 16 person-years' worth of contributions. Most of the collaborators in the digitisation project were older people. This project required the expertise of analysts to perform quality control and do IT design.

The second example is the Jean-Baptiste Auzel archiving project, a commemoration of WWI, which produced digitised lists of statistics involving 400,000 Australian soldiers, and produced such results as the letters of Australian soldiers in France being translated and shared with French villages mentioned.

The Matrix: Indexing techniques and EPUB

Part 2 – Indexing techniques for ebooks

Glenda Browne and Jan Wright; diagrams by Michele Combs

Abstract

In this two-part session, Jan Wright and Glenda Browne discussed software options and combinations used in today's eContent indexing. Jan covered how page layout software, word processing, and our own indexing packages can be used to embed, link, or prepare indexes for a variety of outputs: PDF, ebook, print, etc. Glenda covered tips and techniques for how to index differently for ebooks. When there are no pages it is even more important to keep the reader and their route to the text in mind.

This paper covers Glenda's session on indexing techniques for ebooks. It covers communication between publishers and indexers; standard ebook indexing; proposed EPUB features; single-sourcing; and the future of ebook indexes. Notes from discussions during the talk, recorded by Tracy Jacobs, are included as footnotes.

Communicating with publishers

It is more important than ever to clarify publisher–indexer expectations. Ebook indexing work will require the use of different software programs (and combinations of programs), they will have different priorities (eg, relating to depth of indexing), and they will require different features. It is up to publishers to fully describe requirements to their indexers (whether authors or professional indexers), and it is up to indexers to ask appropriate questions.

Standard ebook indexing

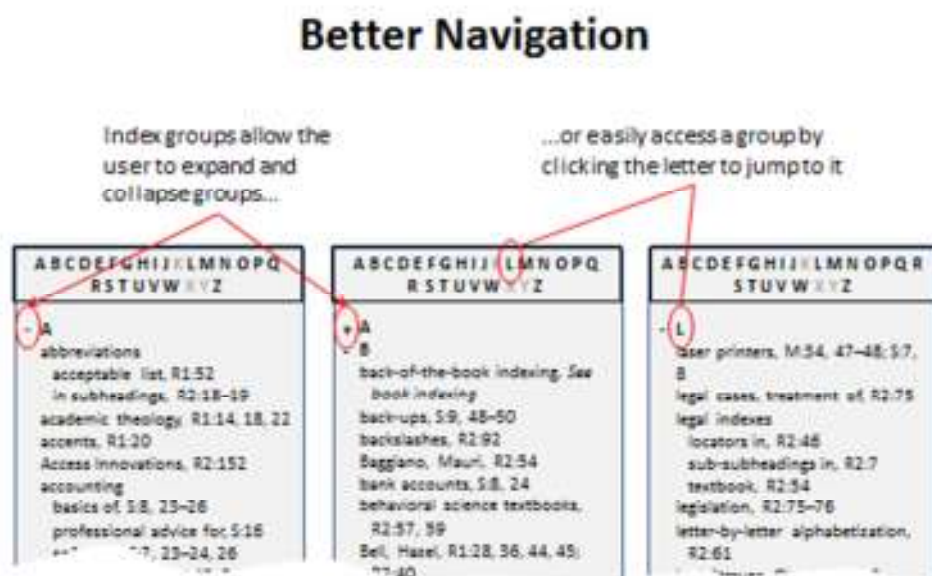
The proposed EPUB standard for indexing provides fundamental ebook indexing features. These include:

- Navigating through indexes
- Indexing for small (or variable-sized) screens
- Locator targets (page break references, paragraphs and points)
- Locator link text
- Locator ranges
- Cross-references

Navigating through indexes

Group break navigation data (eg, letter headings that provide links to portions of the index) is more important for ebooks than for print books, as users can't easily flick through an ebook index to find the appropriate location for their search. Letter headings (eg, 'A', 'Aa-Am', 'A-F') will enable faster and more flexible navigation through the ebook index.

Figure 1. Group break navigation



Some groupings used in print indexes, e.g. headings such as 'New South Wales' and 'New Zealand' in tables of legislation, provide contextual information and may have to be coded as main entries, even though they act in many ways like group break navigation data in a print index and look like simple section headings. Treating them as main entries means they can be displayed to the user in search results along with the entries below them.

Indexing for small (or variable-sized) screens

Many ebooks are read on small screens, and unless they are in PDF format, most use reflowable text. The amount of text that can be viewed by a user at any one time depends on the size of their reading device and choices they or others have made about the display of the book, eg, the size of the font used, and it may be much less than they would see on a typical printed page.

To make indexes work well on small or variable-sized screens, indexers may use:

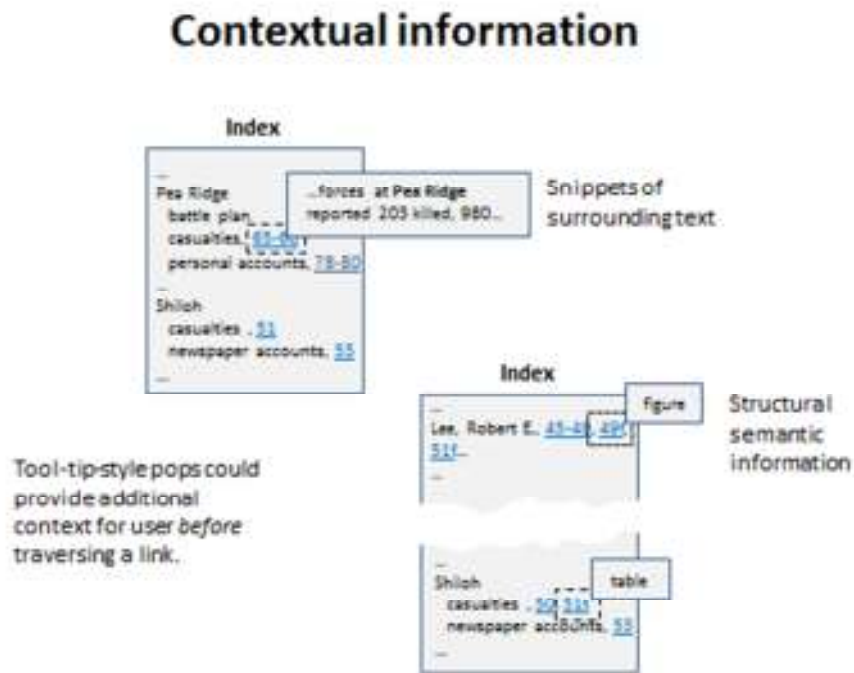
- Shorter entries and subentries to avoid turnover lines
- Shorter subentry lists so main entries don't scroll off the screen

The reading system may be able to:

- Display the associated main entry when you hover over a subentry

- Display only main entries and allow users to expand them as required. That is, a user could browse through all the main entries, and when they find one of interest, open it to see its associated subentries. This may make it feasible for indexers to use longer lists of subentries.¹

Figure 2. Contextual information



Locator targets (page break references, paragraphs and points)

There are two main decisions to be made about locators:

- What size 'chunk' of text will be the target of the locator
- What text (or alternative, eg, symbol or icon) will be used as the clickable or viewable locator

The text targets to be used by an index locator will largely depend on book-wide decisions.

- Whether page break references have been retained for compatibility with print versions
- Whether the book is well-structured, with evenly divided sections and paragraphs
- Whether the content of the book 'chunks' well, or whether it is made up of many discrete mentions of specific topics.

¹ In either case, it could be possible to expand or contract the display of a main entry as needed.

Sections and paragraphs provide logically-coherent portions of content as targets, and show the user where a discussion starts and stops. Indexing to paragraphs is usually easier to create, edit, update and translate than indexing that is scattered throughout the text.²

Exact locations may work better for

- specific terms such as names
- short discussions
- users who want immediate access to specific content rather more than wanting to see the context the content is in. Eg, someone with vision-impairment might want to save time by going straight to the relevant reference in the text. Alternatively, they may want to see the reference in context by viewing the entire paragraph, to reduce the need to backtrack.

If a reading system displays text from either side of the target as a tool-tip-style pop-up, the placement of the anchor will determine the context that is shown to the user.

Locator link text

The choice of what to use as the locator link (the bit the user clicks on) will depend on:

- Whether the book has a print equivalent
- Whether the book has visible or hidden page break references, paragraph or section numbers
- Whether you have a limit of one locator per concept
- Whether you want to show the extent of locator ranges
- Whether the content and indexing will be reused
- Whether you use different options for different reading systems
- Whether you have users with specific preferences

Introduction to Indexing experiment

I created a mini-EPUB ebook based on five articles from my websiteⁱ. I indexed to paragraph and section level, and created two versions of the index. In one the numbers are visible; in the other the main entries or subentries are the clickable links. I have underlined the links here, but in the electronic file they were not underlined.

² Informal feedback via the Tools of Change conference was that paragraphs are the generally preferred option.

The ‘cleaner’ one, in which the entries are links, was considered more attractive

indexing standards

indexing standards 3, 6.1

The second one, with paragraph numbers displayed, was found to be more useful.

- The numbers provide information about the probable length of the content being targeted³
- The numbers help the user home in on the required text when they get to the location in the text
- Including the numbers means that you can have more than one locator per main entry or subentry⁴
- Including the numbers means that if you want to use both main entries and subentries as locators, it is clear to users when a main entry has a link

Locator ranges

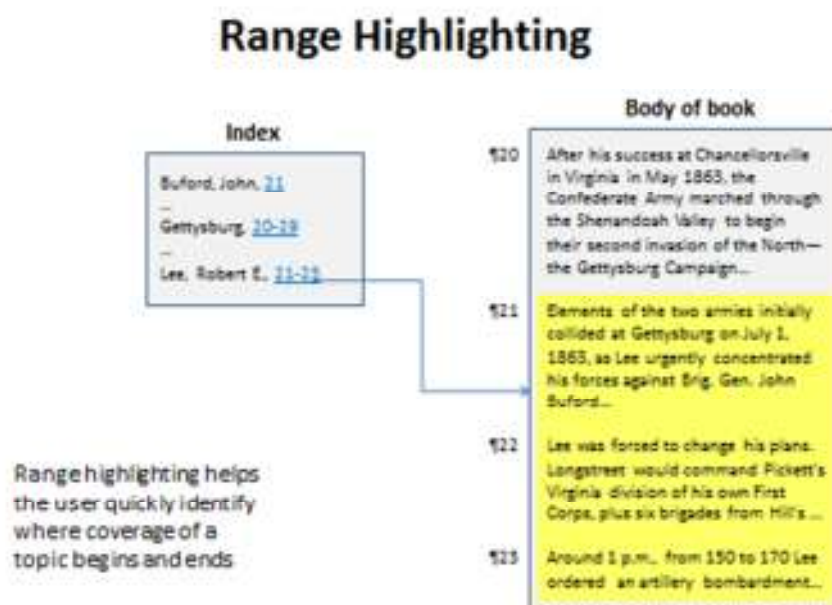
Locator ranges are important:

- For showing the extent of a discussion
- For enabling the reading system to highlight the discussion, so the user sees when the target ends
- For the proposed EPUB Index locator search (see below), in which a user can select a chunk of text to be shown all of the index entries that have been used with that text

³ This assumes that the number 6.1 indicates a subset of number 6. An introductory note could be useful to make the nature of the numbering system explicit.

⁴ The corollary is that information has to be sub-divided more finely when using just words as entries.

Figure 3. Range highlighting



Cross-references

Ebook indexes are likely to have more double entry and less *see* references than print books as space is less likely to be an issue. When *see also* cross-references are used, they can be hyperlinked.

Alternative terms could potentially provide similar information to cross-references (see below).

Proposed EPUB features

EPUB Indexes Working Group (IWG) has been working on a draft specification for indexesⁱⁱ. After review by the IDPF Board it is expected that comments will be received from IDPF members and other interested parties. This will include (among others) indexers, publishers and software developers.

The draft specification proposes coding that will enable the creation of a basic linked index, and also additional features that are not available in print indexes. These proposed EPUB features all depend on uptake of the standard by publishers and reading system manufacturers. Indexers' approaches may change as publisher and reading system support for features improves.

Alternative search terms

EPUB has an implementation suggestion (ie, what we hope reading systems will do) for *Index term search*, which would allow users to search the index directly from the text, either by highlighting words or by typing them into a search box.

Knowing that terms in the text will be used as terms to search the index means that assumptions we made about term inclusion when people were browsing indexes will no longer be true. Eg, while 'foetus' and 'fetus' might file within a few lines of each other in an index, one won't be retrievable

by a search for the other (unless fuzzy searching or a search dictionary is used). Also, we won't be able to rely on the convention that personal names should be inverted, as they won't usually be inverted in the search string (although Boolean searching could help with this).

To deal with this, the EPUB IWG discussed the creation of alternative terms that can be included in search, but not necessarily displayed.

- 'Twain, Mark' could be the main entry and 'Clemens, Samuel Langhorne' a see reference or double entry
- 'Samuel Langhorne Clemens', 'Samuel Clemens' and 'Mark Twain' could be alternative metadata terms⁵

An indexer could work out which alternative search terms are likely to be important by looking for them in the text.

If this option is not implemented, indexers could include alternative words in their term, eg, 'foetus (fetus)'.⁶

Term and locator metadata

The draft EPUB indexes specification proposes the use of term and metadata in indexes. Term metadata is metadata that says something about the nature of the index term – eg, whether the term refers to a name, an author, or a flower. Locator metadata says something about the target of the locator, eg, that it is a figure, a note, or a statute.

Term and locator metadata coding could be used to filter the index. Eg, a user may say 'show only names of authors', or 'show all flowers'. Ideally indexing software will make the addition of this metadata relatively easy, although it will inevitably require extra time and effort.

⁵ The mention of alternative search terms led to a discussion from the audience including the suggestion that it could be used to provide results for misspelt searches in adult education materials, so long as the correct spelling was not omitted because of the provision of alternative entry points.

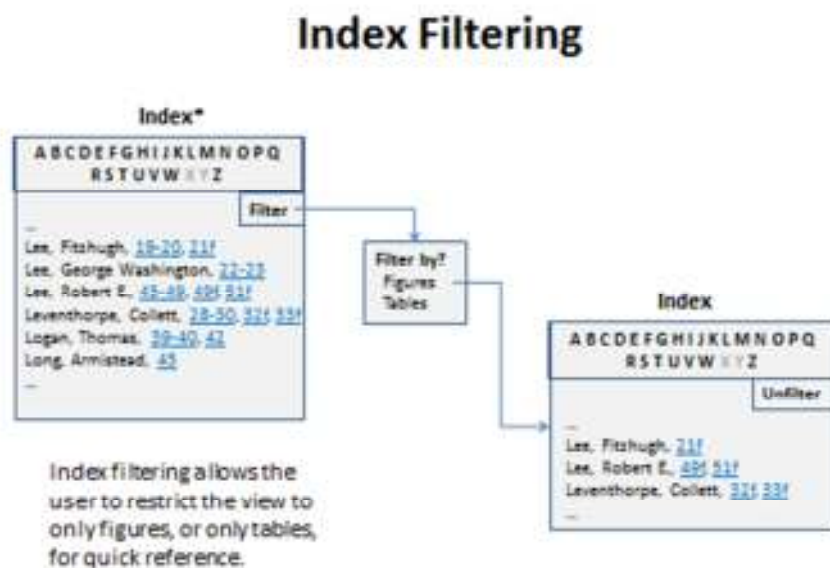
Extra terms can be added as metadata, but the basic indexing structure could remain the same. There would still be a list of preferred terms, but non-preferred terms—including misspellings— could be included (as metadata) for discovery and for education (e.g. did you mean "alternative/correctly spelt" term?). The publisher could come up with a list of synonyms and common errors that could be reused across publications. Would the sophistication of the search tool make a difference? Firstly, we are not assuming anything, and, secondly, a fuzzy search may lack precision.

This (ebooks) is a medium that allows indexers more room for information and allows us to hide that information for a cleaner view.

We could harvest feedback on indexes, e.g. how they are used, did the user find what they wanted. We could use a "was this answer helpful" box, like those used at the end of Help section screens.)

⁶ When I gave this presentation I didn't realise that although alternative search terms had been discussed by the IWG, they were not in the current draft specification. I have amended this text accordingly.

Figure 4. Index filtering



* "I" following a locator indicates a figure

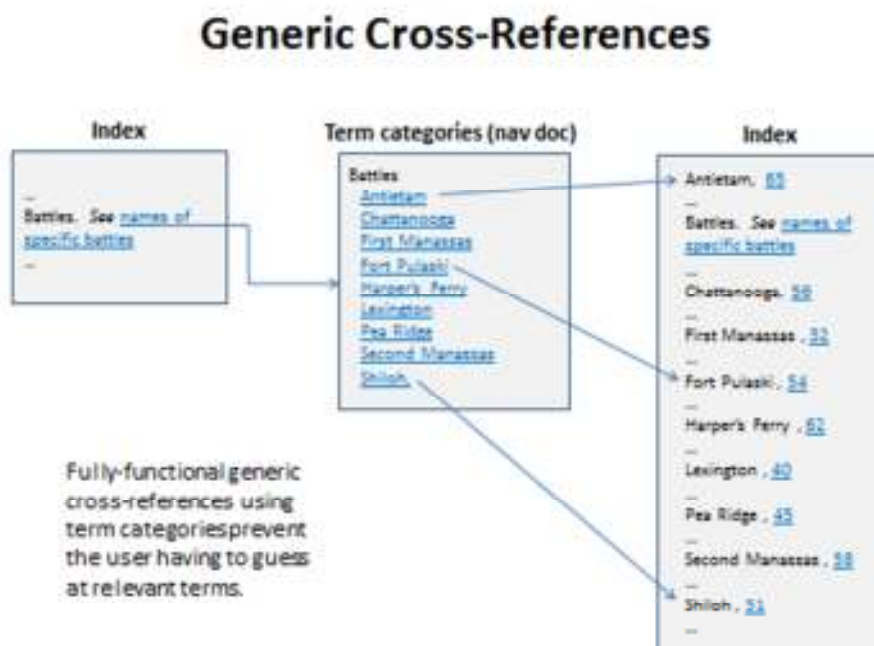
Term metadata coding could also be used to enable the expansion of generic cross-references. In a print index if you write

'prime ministers *see also names of specific prime ministers*'

the user has to know or guess which prime ministers might be included. With term metadata, if the terms have been tagged, the reading system would be able to provide the user with a list of potential targets (ie, names of prime ministers that are in the index), from which they could select the ones of interest.⁷

⁷ However, it does not solve the problem in the print index, and it is not going to happen tomorrow. Indexers need others to join in and make decisions that allow things like this happen.

Figure 5. Generic cross-references



Single-sourcing

Flexible indexing – such as the reuse of indexing terms in different environments, and the creation of indexes to post-publication selections of content – is likely to increase with the advent of linked ebook indexes.

Reuse of indexing

Indexing can be reused in ebooks. Mashups can be created by combining content (with its indexing embedded) from two or more sources. This is likely to be useful for indexes to books in series or runs of journal articles.

Subsets of indexes can be used for books made from parts of bigger books. This is relatively easy using embedded indexing or hyperlinking, but results vary. There may be problems with orphaned subentries, missing cross-reference targets, and relative vs. absolute links. While an index within an ebook only has to provide the relative address within that document, an index to a different document has to provide an absolute address – that is, information about what document to go to, and then where to go within that document.

Because of the potential problems, publishers and indexers need to plan index entries differently if they might be reused.

- Indexing of the metatopic should be made explicit
- Subentries should be included for every entry if practical.

Print and electronic versions

Embedded indexes

Embedding indexes means that one master document can be used to generate various print and electronic versions of the same book. A style sheet determines the output provided for each version.⁸

DocBook markup and style sheets can be used to compile a print and electronic index from XML, usually with section headings as locator link text.

Some Online Help programs including RoboHelp, Madcap Flare and Author-It can now be used to create ebooksⁱⁱⁱ. They may be used in conjunction with programs such as FrameMaker and MS-Word.

There is, as yet, no commonly-available book layout software that natively outputs EPUB or HTML indexes.

- There are expensive customised solutions like Typefi.
- Indesign and FrameMaker can output active PDF indexes, and, using a workaround, InDesign can create EPUB indexes
- MS-Word can output a print index. Word's markers don't completely translate to InDesign when imported.

Unless XML is used, indexers and publishers encounter problems with incompatible markup systems.

Embedded index makers will have to:

- Have to access new software such as XML editors and page layout software. They will also have to use macros and workarounds when appropriate
- Have to learn new skills (eg, XML^{iv}, XHTML5, CSS)
- Have to be aware of different reading systems
- Have to take extra care with file management when indexing involves changes to the master files. Receipt and return of files should be tracked, and nothing should be changed that doesn't have to be changed.

Hyperlinked and tagged indexes

As with embedded indexes, hyperlinked and tagged indexes can be used to create active indexes because the tags are embedded in the text. They are more easily managed in some ways, however, as the index can be created in dedicated indexing software – just the tags or hyperlinks have to be embedded.

⁸ Bear in mind the constraints on print indexes. Do print indexes and eBook indexes need to be the same? Could the print index be an edited (or cut-down) version of the eBook index?

Indexers will have to work out (with the publisher) what links to use and how to link. The publisher relies on an outside compiler to generate views of the index and create links to unique IDs. Transformations must be run to have the index work in each output format, and the publisher may have to tweak the ebook to make sure it displays as intended.

The advantages and disadvantages of embedded, hyperlinked and tagged indexes, and their output options, were discussed in detail in Part 1 of this panel^v.

Ebook indexing future

In the spirit of single sourcing and reuse, the following quotes were taken from the future-looking section of *The Indexing Companion*^{vi}.

‘The trouble with our times is that the future is not what it used to be.’

Paul Valery (1871-1945)

‘Time, occasion, chance and change
To these all things are subject.’

Percy Bysshe Shelley

‘Never let the future disturb you. You will meet it, if you have to, with the same weapons of reason which today arm you against the present.’

Meditations. Marcus Aurelius (121-180 CE)

With good communication, targeted promotion, skills development, quality tools for book creation and indexing, and sound standards, ebook indexing should have a bright future.

Contact us: Jan Wright, jancw@wrightinformation.com, @windexing
Glenda Browne, glendabrowne@gmail.com

Endnotes:

ⁱ Browne, Glenda *Introduction to Indexing*, 2013, free EPUB ebook available at <http://www.lulu.com/shop/glenda-browne/introduction-to-indexing-a-collection-of-articles/ebook/product-20661076.html>

ⁱⁱ Main page for EPUB Indexes Working Group,
<https://code.google.com/p/epub-revision/wiki/IndexesMainPage?ts=1322858948&updated=IndexesMainPage>

ⁱⁱⁱ <http://wiki.mobileread.com/wiki/Book%20authoring%20software>

^{iv} Combs, Michele. 2012. 'XML indexing'. *The Indexer* v.30 n.1,
<http://www.lulu.com/shop/society-of-indexers/the-indexer-vol-30-no-1-march-2012/paperback/product-18952698.html>

^v Wright, Jan. The Matrix Part 1., presented at ANZSI conference, Wellington New Zealand, March 2013.

^{vi} Browne, Glenda and Jerney, Jonathan 2007. *The Indexing Companion* Port Melbourne: Cambridge University Press.



The Matrix

Getting index output in all kinds of
formats, from all kinds of tools

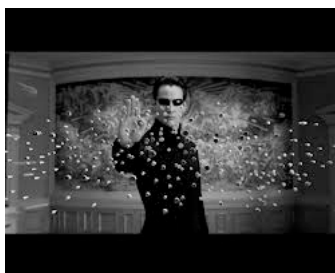
Jan Wright and Glenda Browne

March 2013

Index outputs

- Print
- HTML
- PDF
- eBook
- Apps

(too specialized to list here – ask the production people what they are using and wing it!)



Index software

- Standalone
- Word
- XML editor (Oxygen)
- Frame
- InDesign



Active indexes

- User can click on entries or locators
- User is taken to location in text, or
- User is offered other options to explore



Index inputs and outputs

An activated index with linkages from the index to the relevant text can be created by:

- Embedding the index terms in the text, or
- By creating hyperlinks to anchors that have been inserted (manually or automatically) into the text.
 - There are advantages and disadvantages to each method.

Two Choices

- Index entries embedded in content files
 - Traditional embedded indexing
 - Needs compiler to create index
 - Need mechanism to create links to content locations
- Index entries linked to unique IDs in texts
 - Traditional standalone indexing
 - Needs unique IDs or anchors in content, or a pinpoint location mechanism
 - Needs to be in a format that understands coded links

Standalone indexing and active indexes

Print versions too?	HTML (Web)	PDF	eBook (XHTML)
Yes, as long as unique IDs can show page numbers	Yes, as long as locators point to embedded tags in content code	Yes, with Sonar Activate. Page numbering in book must match Sonar's requirements (volume numbers and using differing page number schemes in same piece confuse it) Acrobat 10 doesn't work with Sonar at this time. Use Sonar Activate 6 for Acrobat Pro 9 projects. Use Sonar Activate 5 for Acrobat 8 Pro projects.	Yes, as long as locators point to embedded tags in content code or we could see utilization of CFI in EPUB. (Canonical Fragment IDs)

Microsoft Word and active indexes

Print versions too?	HTML (Web)	PDF	eBook (XHTML)
Yes, using Word's own module. Regenerate before final printing. You can control the sort, and you can have italics and bold in entries. You don't get to have <i>n</i> , <i>nn</i> , <i>fig.</i> , <i>t</i> - style decorations or specialized locators. You can have generic See refs. Be careful with multiple targets from See and See also refs. No Xref checking.	Must have anchors or unique ids inserted in content. Would take specialized macros to put in tags and get the index to link to them. It is programmed to just look for the page number the text is on at the time.	Yes, with Sonar Activate, as in last slide	Must have anchors or unique IDs inserted in content. Would take specialized macros to put in tags and get the index to link to them. Word is programmed to just look for the page number the text is on at the time.

LibreOffice indexes to 'chapters' and their subsections. They have to be heading levels, eg, 'heading 1', 'heading 2'. You can set the levels to be numbered, or lettered or both (eg, 1, 1.a)– from Jon Jermey

XML editors (eg., Oxygen) and active indexes

Print versions too?	HTML (Web)	PDF	eBook (XHTML)
Must have a DTD set up to output print and declare page numbers. Oxygen has a DocBook stylesheet you can apply, and it generates the index when you compile the book. You can have italics and bold in entries. You don't get to have <i>n</i> decorations or specialized locators. You can have generic See refs. Be careful with multiple targets from See and See also refs. No Xref checking.	Must have XSLT transforms to convert XML to HTML, and have the anchors and unique IDs linked to the entry by the index compiler portion of the XML editor.	Must have XSLT transforms to convert XML to PDF, and have the anchors and unique IDs linked to the entry by the index compiler portion of the XML editor.	Must have XSLT transforms to convert XML to XHTML, and have the anchors and unique IDs linked to the entry by the index compiler portion of the XML editor.

XSLT transforms: a set of XML-based processes that take XML and make it into HTML or XHTML or PDF

FrameMaker and active indexes

Print versions too?	HTML (Web)	PDF	eBook (XHTML)
Yes, using Frame's own module. Regenerate before final printing. You can control the sort, and you can have italics and bold in entries. You don't get to have <i>n</i> decorations or specialized locators. You can have generic See refs. Be careful with multiple targets from See and See also refs. No Xref checking.	Have not heard of anyone outputting HTML from Frame. Frame requires a special macro to create the HTML TOC based on styles. If Frame doesn't convert the TOC file, they probably are not converting the index. It may be possible, but would likely take a ton of work.	Yes, Frame activates the PDF index, to the page level only. Not pinpointed to paragraph.	Jan has been told by Adobe engineers that Frame does convert indexes to EPUB. Cheryl Landes found out that Adobe says to convert a document created in Frame to EPUB via RoboHelp, but that the index doesn't look very good.

InDesign and active indexes

Print versions too?	HTML (Web)	PDF	eBook (XHTML)
Yes, using InDesign's own module. Regenerate before final printing. Don't count on having any italics or bold in your entries. You can control the sort. Be careful with multiple targets from See and See also refs. No Xref checking.	Not natively, as it strips out index entries. It would need to use scripts or macros, or a standalone index to anchors inserted in InDesign's content.	Yes, InDesign activates the index, to the page level only. Not pinpointed to paragraph.	No. Not yet. The EPUB export filter strips out the entries. We can get around it using scripts. http://www.wrightinformation.com/Indesign%20scripts/Indesignscripts.html and Rich Bines is working on a plug-in richbines@btinternet.com Kerntiff Publishing Systems Ltd. www.kerntiff.co.uk

Workflow issues



What's inserted into the content?

	Entries linked to unique IDs in content	Entries embedded in content
What is inserted into the content files either by the publisher or the indexer	HTML anchors or unique IDs. IDs must be able to be converted by compiler into HTML anchors or other anchor format required for links to work	Codes containing complete contents of index entries as fields, XML elements, or program's own unique marking system. Not usually HTML anchors. Relies on compiler in software to create and build index and links. Depending on the program used, it may or may not also have HTML anchors or location IDs that can be exported or manipulated by indexer. Codes could be converted to have unique IDs or anchors with macros.

Single sourcing capabilities

	Entries linked to unique IDs in content	Entries embedded in content
How do you use one set of files to get indexes in all kinds of output (PDF, HTML, XML, eBook?)	<p>Risk of losing unique IDs by writers deleting or copying IDs accidentally.</p> <p>Relies on outside compiler to generate views of index and create links to unique IDs. Transformations have to be run to have the index work in each output format. If the book's basic software doesn't provide good output, publisher will have to tweak the whole thing to go to HTML or eBook.</p>	<p>We don't have commonly-available book layout software that natively outputs ebook or HTML indexes yet. (There are expensive customized solutions like Typefi.) DocBook can compile an XML print index. Indesign and Frame can output active PDF indexes. Word can output a print index. Word's markers don't completely translate to InDesign when imported. We are fighting the battle of incompatible markup systems unless it is XML.</p>

Granularity of location display

	Entries linked to unique IDs in content	Entries embedded in content
When you click an index entry, how close do you get to the right content?	Can point to paragraph or word level. Must choose a concrete page if a page number is displayed on screen. Page number could be wrong if content shifts. Indexer chooses displayed number. If you rely on already embedded anchors, these will be limited, eg, to paragraph level. Unique IDs at every word adds too much data to the content files, which must remain within limits for EPUB.	Can point to paragraph or word level. Module chooses page number to display. Can be wrong if index has not been regenerated. Most modules still work as snapshots, and need to be regenerated every time content changes.

Software to use

	Entries linked to unique IDs in content	Entries embedded in content
What do you use to get results in....	Can use any of the standalone software packages. Indexer must figure out how to refer to unique IDs in location field. Packages can output tab delimited, RTF, and with some help, XML and HTML. PDF can be output from RTF. Sonar Activate for PDF. What software you use for linking to anchors (and the format of the links) depends on the format the books would be in.	<p>InDesign, Frame: Modules are primitive, few keyboard shortcuts, can be expensive, some like InDesign don't support full range of index formatting and sorting. Markup codes for entries don't match any other package's entry markup codes, which means incompatibilities if you import or export.</p> <p>Oxygen, DocBook and XML: Steep learning curve. Must compile to view the index as it is developing</p> <p>MS Word: markup codes don't match any other software package. Docx files are XML files with flavor. TexTract is one possibility for embedding in Word now, and may be able to index to anchor codes in files.</p> <p>LevTech's EPUB Pinpoint Index tool set</p>

File management

	Entries linked to unique IDs in content	Entries embedded in content
Who has the files and when?	Work is done outside the files. Must coordinate changes to files with publisher.	Indexer has to have the files. Or client must have macros to put in macro placeholder codes. Then indexer works outside the files using macro placeholder codes as locators. Once edited, macros insert and format the index entries into the files in one fell swoop.

File changes and tweaks

	Entries linked to unique IDs in content	Entries embedded in content
Who can change the files and when?	Publisher can be tweaking files once anchors are in as long as they don't delete anchors or unique IDs. Publisher can either run scripts to put in anchors and hand off copies to indexer, or indexer can run scripts and return a set of files to publisher.	Publisher must be hands off at critical stages in indexing (such as editing.) Can swap files in an out for entry stage. If using macro placeholder codes (as discussed in last slide) publisher can still be working in files but must not move or remove placeholder codes. Process should include error checking to show any mismatches in macro placeholder codes.

What about page rolls?

	Entries linked to unique IDs in content	Entries embedded in content
If pagination changes and content moves around?	An issue for print and pdf indexes if the indexer is choosing page numbers as the location display. If solely an online index using links, not an issue.	Index must be regenerated after each content change. Indexes are usually not two-way-changes aware. The content may know it has changed, but the index does not know.

Translation issues

	Entries linked to unique IDs in content	Entries embedded in content
Translating content and index into other languages	Index will have to be translated in a separate step (actually a good thing, as embedded index translations done marker by marker will be sloppy).	Easy to do, but could be sloppy. If in Word or Frame or XML, translator will translate each entry as they encounter it. These could be left unedited, and not consistent. In InDesign, translator should work in Index palette, and would get a more consistent translation.

Localization/localisation issues

	Entries linked to unique IDs in content	Entries embedded in content
This means changing phrasing to match local country's usages and spelling variants. Also means removing colloquialisms and metaphors that do not make sense outside the originating country. "Color"/"colour". "Horse of a different color"/"an entirely different matter"	Same as translation	Same as translation

Chunking content

	Entries linked to unique IDs in content	Entries embedded in content
Creating smaller books from chapters and still having an index	Easy, with varying results. May be issues with orphaned subs and Xref targets. May be issues with relative vs. absolute links	Easy, with varying results. May be issues with orphaned subs and Xref targets.

Corruption chances

	Entries linked to unique IDs in content	Entries embedded in content
What is going to break?	Print index may not match if publisher mangles the files. Mistyped IDs won't link. Need error reporting on linking.	Writers and editors could delete entries. Symbols and special characters can break compiles. Complex or large books can cause RAM issues in compiling. Beware of large books in one large file: if one section goes bad, you lose the entire piece.

Updates and revisions

	Entries linked to unique IDs in content	Entries embedded in content
What about next year or next month when we revise it?	Sorting by locator order if based on pages can be easy as long as changes are not extensive. Able to review indexing for paragraphs and pages if the locators used originally were consecutive.	Depends on software used. Must be able to view index entry content in paragraph context. Word, yes. Frame, yes with IxGen. InDesign, yes, with new scripts from Ole Kvern (contact Jan for these, they are new). XML, yes, if you are used to looking at XML.

Legacy Index Conversions

	Entries linked to unique IDs in content	Entries embedded in content
What about older publications that have an index and now need to get published as EPUB or MOBI books?	If you have the index file, put unique anchors into the paragraphs with a toolset like LevTech's Pinpoint Index, or the InDesign scripts from Ole Kvern, then Page Number Order (PNO) the index and enter new paragraph locators that go to the anchors	Same as any embedded index in Word or InDesign or Frame or XML – you have to get anchors or unique IDs in place and get the index module to use those instead of page numbers. Almost easier to use technique to the left, except you need a PNO, which these programs don't give you. Convert index to Cindex/Macrex/Sky and then go with technique to the left.

More Resources

- American Society for Indexing's Digital Trends Task Force (DTTF):
<http://bit.ly/rFp0Re>
(Many links from this page)
- Converting a Legacy Print Book to an EPUB with Pinpoint Index Linking – Keywords V. 20 N. 3 July – September 2012
- Linked in News on Indexing and eBooks
<http://www.linkedin.com/manageGroupMembers?dispParts=&gid=4005509>
- Legacy indexes: Talk to Dave Ream at <http://www.levtechinc.com/> or DaveReam@levtechinc.com
- Twitter: @ASIndexing #ePrdctn hour
(every Wed morning, 11 am East, 8 am Pac)
#indexing
#dailyentry
@isc/csi
#windexing

Ungoing updates

- All of these techniques and technologies are going to be changing
- We need your help to keep us up-to-date if you see a new tool or method
- Email us, or post news on the Linked-In site. We need all the news gatherers we can get!



Contact us

- Jan Wright, jancw@wrightinformation.com, @windexing
- Glenda Browne, glendabrowne@gmail.com



DTTF session ANZSI

DTTF initial setup: Mary Harper, Dave Ream, Jan, Board of ASI. Structured as 3 co-chairs. Board gave initial funding for us to use to spread message. Initial challenges: getting ebook indexes active, getting software companies to put in activation, getting ebook reader manufacturers to allow live indexing, getting distributors to include indexes in samples, working with key influencers, getting our membership up to speed, and getting publishers to think about the index issue.

Committee started with Skype calls every month, and now use an ASI sponsored line for monthly calls.

Focus on EPUB: open source standard used around the world. Kindle uses a different format. Made our case to the International Digital Publishing Forum (IDPF) by joining, and presenting a charter document. They were in the right place to support it at the time, with a dictionaries effort coming on as well. Dave, Michelle Combs, Glenda Browne and an international team have been working, and spec is ready for review soon.

Ebook manufacturers: The sad tale of Amazon, but the rest of the readers do epub. Barnes and Noble are going to fully support epub3. Kobo supports epub. The apple bookstore supports epub. We hear that Amazon is moving forward with their XRay feature, and we can hope to see some work for us in writing XRay files as that effort solidifies.

Publishers: We have attended two NYC Tools of Change, The Frankfurt Tools of Change, PubWest for western US publishers, a mini Tools of Change, WritersUA (technical writing), Digital Book World, Book Expo, and many other smaller conferences. Speaking at these events garners the most attention. It is critical to speak at the conference.

Member education: we have been holding sessions at the national ASI conference, one session in every region, webinars, and weekly emails of news and events. Our linked in page gives us one location to keep news flowing. In addition, members of DTTF have spoken at the Canadian conference, the Dutch one, Chinese, SI in England, and now here again for ANZSI. We have been maintain and improving our website with more and more links for indexers.

Social media: It is hard to explain how far social media has helped us in this effort. Tweets during our first Tools of Change presentation about our message led to more tweets and discussions with key influencers of the ebook world. We were invited to host twitter hours discussing indexing, and able to give key influencers the messages that they needed to argue our cause when they were talking to engineers and ereader companies. This led finally to being on a special team at Adobe to advise on indexing module development in InDesign, and all of it has led to further invitations to give workshops and speak. It creates a giant rolling ball of momentum, that we keep kicking along. The last Tools of Change in NYC, and Pilar's presentation, led to "index for discovery" being on of the top five

buzzwords for the conference. Indexing is finally a big issue. And the ball is still rolling, larger than ever. Tweeting, and attaching #indexing and #epdctn will get us noticed. Twitter also helps: Sheila Ryan and Gale Rhodes were looking for help with InDesign and a live index, and tweeted. Matt Deiner, a key influencer, is now working with them. Don't ignore this tool! At one point after Pilar's TOC workshop the discussion on Twitter was hilarious. Someone said the best moment of the conference was when the indexers threatened to storm the stage when someone opined search would be all we need. Pilar said no, we didn't storm the stage, but the rumor resulted in our own hashtags:

[#dontwantindexersmadatme](#) and

[#helpsHughThrowAlistairUnderBusFullOfAngryIndexers](#)

Articles: We have to be sure our professional journals keep carrying more information about ebook efforts, news and techniques, and that we distribute these as widely as we can. We have been writing and writing, and we will keep on writing!

Ebook examples: ASI is converting its book series slowly to ebook for sales, and it has been an interesting journey. Dave can tell story here. Glenda Browne can tell you about her conversion of her own materials. The goal is for us to have examples ready to show, and the new IDPF spec will have several marked-up examples to display when it goes on review.

Demos: We had two demos developed for us by Jerry Whiting, a Seattle programmer to help us get our message across. The first was shown at the original TOC, and has a script that goes with it. It demos model interfaces for an active index. The second is focused on mashup indexes for discovery, and was used by Pilar in both Frankfurt and the second Tools of Change, and by Jan at the mini-Tools of Change. These were enormously helpful in demonstrating where we want to go. We have them here if you want to see them. Stop me and ask.

Software: We currently have InDesign scripts that can give us a workaround for live indexes courtesy of Olav Kvern. Dave Ream has developed tools for converting legacy indexes to ebook active indexes. Several indexers have been working with Rich Bines to get an active tool for InDesign, and there is at least one more tool I can't talk about in development. Plus, Dave and I had a 5-hour meeting with Adobe Engineers concerning InDesign's issues.

Key influencers: When we identify a key influencer, we try to be sure that we have a good discussion about what indexing is, how it can be leveraged and reused, and we find that keeps the snowball rolling. Each key influencer then knows us, and knows to ask us. We have done interviews with Hugh McGuire, audio podcasts with the eBook Ninjas, and made sure our messaging is understood by ebook producers as much as we can.

Key themes:

Index as a discovery tool: “**discovery**” is a big theme for publishers, as it is increasingly hard to get content seen if we lose bookstores and browsability. Our answer to publish your indexes and mash them up has been working well.

Publishers also need to download indexes in their sample chapters and giveaways.

Navigation: unique tool, democratic tool to get into the content. Use it with search. Put it first so it is searched first. Develop tools to use our new markup to make ebook navigation robust.

Metadata: It's reusable, it's portable, it can be mashed up, it can be finetuned to help search, and it could be external as a field in Onix or other standards. It can be the baseline for taxonomies.

Intrepid indexing: indexing without boundaries

Presenter bios

Fergus Barrowman

Fergus Barrowman is the Publisher of Victoria University Press. He has a BA (1st class Hons) from Victoria University; has been editor of VUP since 1985; and editor and publisher of *Sport* literary magazine from its foundation in 1988.

Cornelia (Nelly) Bess

Nelly Bess is a database indexer with the National Library of New Zealand. She has some experience in back of the book indexing, and worked as a translator/editor for Japan Echo in Japan in the late 1970s–1980s.

Robin Briggs

Robin Briggs is an indexer and text editor who has indexed many books on Māori topics and researched the ways in which Māori names and terms have been handled in English in the past and present.

Glenda Browne

Glenda Browne has worked since 1988 as an indexer of books, periodicals and online help, and has created thesauruses and metadata for websites, and classification schemes for organisations. She is also a librarian one day a week at Westmead Hospital Library. Glenda teaches book and website indexing for various organisations, including Macleay College, ANZSI and the NSW Society of Editors. She writes about indexing and information science for various publications including *The Indexer* and *Online Currents*, and has written or co-written three books on indexing including *The indexing companion* (Cambridge University Press, 2007), the index of which was Highly Commended in the 2008 ANZSI Medal awards. Glenda is ANZSI's representative on the IDPF EPUB Indexes Working Group.

Ross Calman

Ross Calman is a Wellington-based writer and editor who affiliates to Ngāti Raukawa, Ngāti Toa and Ngāi Tahu. He has worked in the New Zealand publishing industry for over 15 years and specialises in Māori language editing. His clients include publishers and government departments. He is also the author or co-author of nine books, including Māori mythology anthologies, Māori-English dictionaries and introductory works on the Treaty of Waitangi and the New Zealand Wars.

Judith Cannon

Judith Cannon is the indexer in the Family History Unit, AIATSIS working with the Aboriginal and Torres Strait Islander Index (ABI). She has extensive experience working with information concerning Australian Indigenous peoples.

Mei Yen Chua

Mei Yen Chua is a freelance indexer, writer and publisher. She is the publisher of an independent food guide, *Brisbane's Budget Bites* and writes for *The Good Food Guide* and *Foodies Guide to Brisbane*. She is passionate about food, travel and food book collecting — when she's not reading and writing about food, she can be found indexing books.

Mary Coe

Mary Coe has been a freelance book indexer for 20 years, working in a wide range of subject areas. She also has extensive database indexing experience, including the National Library of Medicine's MEDLINE database and The National Security Archive in Washington, DC. She is currently a student in the Master of Information Studies course at Charles Sturt University and is an active member of the Australian and New Zealand Society of Indexers. She can be contacted at coe.mary@gmail.com or through her website at <http://www.bookindexing.com.au/>

Peter Cooke

After two degrees from Massey University and sampling other careers, Peter Cooke became an historian specialising in military history and industrial heritage. His works include *Fit to Fight, A History of Compulsory Military Training and National Service* (Ling, 2013), *The Territorials* (with John Crawford, Random House 2011), *Auckland Infantry* (3rd Battalion Auckland (Countess of Ranfurly's Own) & Northland Regimental Association, 2011), *The Gunners* (RNZA, Raupo, 2008), *Defending New Zealand – Ramparts on the Sea 1840-1950s* (DONZ, 2000), the official corps history of the Royal New Zealand Electrical & Mechanical Engineers, 1942-96, and co-editing *No Better Death – The Great War Diaries of William G Malone* (some of which he indexed). He edits the journal of the Defence of New Zealand Study Group and organises field trips to sites of interest within NZ. He has documented pioneering military technologies and delved into Shell Oil NZ Ltd, Wellington RSA and various aspects of NZ civil engineering.

Carol Dawber

Dr Carol Dawber is a writer, editor, indexer and oral historian working mainly with print books on New Zealand history and biography. She is the managing editor of River Press publishers.

Heather Ebbs

Heather Ebbs, a freelance editor, writer and indexer, is a past president of both the Indexing Society of Canada / Société canadienne d'indexation and the Freelance Editors' Association of Canada. She is a past winner of ISC/SCI's Tamarack Award for "service above and beyond" and of the Editors' Association's Tom Fairley Award for Editorial Excellence. Currently, she is the International Liaison for ISC/SCI and an instructor for the University of California, Berkeley, online extension course in indexing theory and application. Over the past 30-plus years she has worked in both Canada and the United States, and she has written hundreds of indexes for books, periodicals and databases.

Uili Fecteau

Uili Fecteau is an archivist in the Archives Online team at Archives New Zealand, and currently manages the Archives YouTube channel and work on the German Samoan Digitisation project. He has been working at Archives New Zealand for almost seven years, five in the Research Services team and has a deep appreciation of any good index to records. He is a Wellingtonian by birth, but Samoan and American by heritage. He has an Art History background from Victoria University and the University of Melbourne. His work with the German Samoan records goes back three years, and he is enjoying the technical challenges it has posed.

Tordis Flath

Tordis Flath trained as an indexer in 1988 in England working for Indexing Specialists. She then worked in-house for *The Listener*, which she indexed along with several TV magazines for four years. In 1997 she began freelancing in back-of-the-book and journal indexes. She helped in founding the New Zealand Branch of ANZSI in 2004, was president from 2004-2006, a committee member in 2008 and vice-president since 2009. In 2004 she won the ANZSI Medal for her index to the biography of painter Toss Woollaston. She has been a mentor for the NZ Branch Mentoring Scheme since 2005, and also organises and runs training courses.

Lynn Jenner

Lynn Jenner is a creative writer who specialises in work which crosses traditional genre boundaries. Sometimes her work is poetry, sometimes history and sometimes memoir. Her first book, *Dear Sweet Harry*, (2010) about Harry Houdini, Mata Hari and her grandfather in the First World War, won the New Zealand Authors Society prize for Best First Book of Poetry. Lynn has recently been writing a four part work about human responses to loss, called *Everyday Life in the Ancient World*. This project was her PhD thesis at the International Institute of Modern Letters in Wellington. In 2012-13 Lynn and Tordis Flath collaborated on an Index for Everyday Life in the Ancient World. The Index was intended to be a creative work in its own right, containing poetic elements as well as performing the more conventional functions.

Jon Jermey

Jon Jermey is an indexer and former computer trainer with an interest in technology and programming. He has used SKY Index since its first appearance, and has developed a range of macros and other techniques to enhance its productivity. He is co-author with Glenda Browne of *Web Indexing* and *The Indexing Companion* (CUP, 2007). He has been involved in computer training for over twenty years, most recently for WEA Sydney.

Lai Lam

Born and raised in Hong Kong, Lai moved to Auckland in 2004 when her family immigrated to New Zealand. Lai's background is in graphic design and marketing but became a freelance translator and Japanese language teacher after her daughter was born. Lai has studied and worked in Japan and holds a BA in Japanese as well as an MLIS from Victoria University. She came to indexing after a one-year project indexing the New Zealand Chinese Digital Journal Database for the Auckland City Libraries.

Lai has presented on the topic of Asian names for ANZSI as well as ASI over the past year and really enjoyed the research process. She currently works at the University of Auckland Library's cataloguing department cataloguing both English and Chinese materials.

Frances Lennie

Frances S. Lennie became a freelance indexer in 1977, after a period of teaching at both the secondary and tertiary educational level in the United Kingdom. She established her U.S. company, Indexing Research, in 1986 to develop and market CINDEX™ indexing software. She served on the ASI Board as Treasurer 1992-1998, was President 2003-2004 and 2010-2011, has been a juror for the ASI/W. H. Wilson Award, received the Theodore C. Hines Award in 2005 and is a founding member of the Western New York chapter of ASI. Frances is a frequent speaker at indexing meetings in the US and overseas, has contributed to several ASI publications, and from 2000-2006 conducted semester-long indexing training courses for New York University's School of Continuing and Professional Studies.

Takashi Matsuura

Takashi Matsuura had been compiling indexes for many years at Japan Fukuoka University. His Major work is a Chinese classical poems' index of the first letter. In order to search for the poems written in the 800 years from the Han Dynasty to the Sui Dynasty more easily, he spent more than 20 years completing 11 dynasties' poems with the help of more than 500 students. He has also compiled the end of professional books' indexes. He was a member of the Index Institute of China and studies hard every year, for there is no index institute in Japan.

Max McMaster

Max McMaster has been a full-time freelance indexer for the past 20 years working across a range of subjects with emphasis on the sciences, but covering environment, business, social sciences, education and general trade titles as well. He has in excess of 2000 indexes to his name. Max lectures on indexing to editing and publishing students at a number of Australian universities and is an instructor for the University of California, Berkeley Extension indexing course. He also runs indexing training courses for the Australian and New Zealand Society of Indexers (ANZSI) and other organisations throughout Australia, New Zealand and Singapore. Max has been awarded the AusSI Medal (now ANZSI Medal) for book indexing on three occasions. He is a Life Member of ANZSI, and is currently treasurer of ANZSI Council.

Simon Minto

Simon Minto has been an editor at Learning Media for the last ten years and is a tutor in editing at the Whitireia Polytechnic. He's edited a wide variety of books and resources for children and teachers. This has included books for the North American educational market, as well as for New Zealand. He has written indexes for many children's books.

Trish O'Kane

Trish O'Kane is an engaging international presenter, with much experience presenting in New Zealand, Australia, the United States, and in Europe. Trish has 14 years' experience consulting in information and records management across a wide range of government, local government and corporate agencies. She is active in Australasian and ISO recordkeeping committees. Trish is the Chair of the International Review Group established by Standards New Zealand to promote engagement by the New Zealand community in standards, a Charter Member (MRIM) of the Records and Information Professionals of Australasia, and a Member New Zealand Institute of IT Professionals.

Margaret Pointer

Margaret Pointer is a history graduate from VUW and has been a history teacher. She became involved in research and writing while living overseas and developed a special interest in Niue history while living on the island. Her writing is not limited to Niue but it seems that she is one of the few people working in this field and has been approached by Te Papa, Auckland Museum, Māori Television and the Ministry for Culture and Heritage to help with Pacific projects. She is a committee member of PHANZA and editor of their magazine, *Phanzine*.

Fiona Price

Fiona Price is a Melbourne-based writer and consultant of bicultural background (Anglo-Australian and Malaysian Chinese), who has been working in cultural diversity management since 1991. In 2001, after completing her PhD in cross-cultural psychology, she set up her own consultancy providing training and recommendations to people working in multicultural environments. Her clients include the Australian Crime Commission, AUSTRAC, International House, the Port Adelaide Enfield Library Service, the Maribyrnong City Council and 16 Australian universities. Her reference book *Success with Asian Names* was published by Allen & Unwin in 2007.

Sherrey Quinn

Sherrey Quinn is the principal of Information in Order and a partner in Libraries Alive!, the specialist library and information consulting company established in 1997 and based in Canberra. Sherrey works on information management projects, including indexing projects (back-of-book, journal and database indexing), controlled vocabularies, and a broad range of library-related projects including planning, reviews, training, system evaluation and implementation.

Sherrey has been an Australian and New Zealand Society of Indexers (ANZSI) Accredited Indexer since 1992. She is also a Fellow of the Australian Library and Information Association (ALIA); an ALIA Certified Practitioner; a member of the Special Libraries Association (US) and of the Canberra Society of Editors. Sherrey currently serves as Chair of the ANZSI Board of Assessors for the ANZSI Accreditation scheme, and is the Treasurer of the ACT Branch of ANZSI. Prior to the establishment of Libraries Alive!, Sherrey managed library and information services in government agencies and science and technology research organisations; during this time she managed or participated in numerous indexing projects. She began her career at the National Library of Australia.

David Ream

David Ream is Leverage Technologies' chief consultant for publishers. He has a B.S. in Engineering and an M.S. in Computer Science from Case Western Reserve University. David has spent over 35 years working with publishers in the areas of typesetting design and production, database creation, editorial systems, and electronic publication design and production.

One of David's earliest assignments (in the mid-seventies) involved creating custom programs to sort legal indexes into locator order and then back into alpha order. Since then he has worked on many indexing, abstracting, and thesaurus projects and systems. Currently, indexing projects center around integrating Indexing Research's Cindex into corporate and governmental publishing operations including web applications. LevTech also performs computer consulting and programming for editorial applications as well batch composition services.

Mary Russell

Mary Russell is a freelance indexer and while she enjoys indexing predominately science and medical works, she occasionally branches out to index/catalogue a private collection of objects, such as bookplates, or to prepare a descriptive bibliography of perhaps an author's complete work, or a collection of old books. She has a MSc in statistics and is excited by the possibilities for indexers in the area of data visualisation. She is the President of the Australian and New Zealand Society of Indexers.

Kay Schlembach

Kay Schlembach has been passionate about teaching beginning indexers for more than a decade. A "marvelous, vivacious teacher," Kay is a managing partner with Potomac Indexing, LLC (www.potomacindexing.com). In addition to speaking, she has served as an ASI director, an ASI Training Course developer, committee member and evaluator. Coming from a diverse background, including homeschooling gifted children and real estate appraisal, Kay has been a full-time indexer since 1997. Kay lives and works near Washington, DC.

Dave Small

Dave Small has been Team Leader for the Indexing Team at the National Library of New Zealand since June 2012. His previous roles include Curator of Maps at the Alexander Turnbull Library for 10 years before a 2 year secondment as Curator of New Zealand and Pacific publications. Dave qualified as a librarian in 1996 with a Master of Library and Information Systems (MLIS).

Claire Stent

Claire Stent began her library career with the National Library of New Zealand before moving on to work in special libraries. She has a special interest in using available tools and technologies to provide innovative services to clients. For this work, she was awarded the 2009 Information Professional of the Year award from the Special Libraries Association (SLA) Australia and New Zealand Chapter. Claire was the project manager for the digitisation of the *New Zealand Official Yearbooks*. This project

was a finalist for the 2012 IPANZ Excellence in the Public Sector Award for Networked Government. She was also awarded the LIANZA Award for Merit in Digital Services. Claire is a regular speaker at New Zealand and Australian conferences and has written papers on the use of technology to improve information services, looking outside the library profession and the digitisation of numbers as seen in the New Zealand Official Yearbook. Currently she works in the Data Management and Preservation Unit at Statistics New Zealand, supporting statisticians in the creation of discovery and statistical metadata.

Jenny Wood

Jenny Wood is the Library Systems Manager in the AIATSIS Library. She looks after the metadata in the Mura[®] catalogue including the ABI records. She has extensive experience working with information concerning Australian Indigenous peoples.

Jan Wright

Jan Wright is based in New Mexico, USA, Jan specialises in embedding indexing, with a focus on single-sourcing, translations, and repurposing into multiple output formats and versions. She uses InDesign, Framemaker, XML and similar tools. Jan co-chairs the American Society for Indexing's Digital Trends Task Force, focusing on eBook and device-based indexing. In her role with the Task Force, Jan focuses on outreach to publishers, conversion houses, tool developers, software manufacturers, and is indexing's liaison to a new Adobe InDesign EPUB working group.

Jan has worked for a range of high-profile companies including Aldus Corporation, Visio Corporation, Apple, Microsoft and Autodesk departments. Jan has won numerous awards from the Society for Technical Communication. In 2009 she won the ASI/H.W. Wilson Award for Excellence in Indexing for her index to *Real World InDesign CS3*—the first technical trade book to win the award.

Pilar Wyman

Pilar Wyman, Chief Indexer, Wyman Indexing, has been involved in indexing since late 1983, and has been writing indexes as a successful freelancer for over 22 years, since early 1990. She works in English, Spanish, and French preferably in clinical medicine, med-tech, and health subject areas, as well as other areas of personal interest. She has published numerous articles on indexing including the popular "The Business of Being in Business" (*Key Words*, Oct-Dec 2006: 130–133, 141. Reprinted and updated in *Starting an Indexing Business*, 4th ed., Information Today, Inc. 2009). Pilar serves the American Society for Indexing (ASI) as International Representative and currently as President-elect. She gives presentations and workshops as her time allows.