

Book reviews

Edited by Christopher Phipps and Michael E. Jackson

Indexing your annual report: a guide. Mary Russell and Max McMaster. Glenferrie, Vic: ANZSI, 2010. iv + 44 pp. ISBN 978-0-9808284-0-5 (print) 978-0-9808284-1-2 (PDF). PDF version AU\$25.00; print version AU\$35.00.

Indexing annual reports might strike many across the English-speaking world as something of a niche market. In Australia, though, an index is legally required for any report presented to Parliament and is also considered essential by the influential not-for-profit organization, Australian Reporting Awards, so it is perhaps unsurprising that such a specialist guide should appear from ANZSI.

Nevertheless, Russell and McMaster scrupulously avoid promoting the idea that only ANZSI members are capable of achieving workable results. Indeed, they concede near the start that not all reports will justify the employment of a professional indexer (and even that there may be sections and specialized subcategories where the authors' perspectives might make them a better choice). It is intriguing, therefore, to see how, through plain, jargon-free text and well-chosen examples, they succeed in distilling the rudiments of the indexing craft into digestible guidelines which will lead the non-specialist stepwise towards effective index making. Having demonstrated what any index must provide to satisfy the annual report user, the guide's authors then leave it to untrained indexers to decide whether, even with such guidance, they would do better to turn to a professional.

Annual reports are both standalone documents and serials: prepared to tight, last-minute deadlines and yet subject to only modest variation from year to year, so suggested preparation for indexing one includes making an index for the previous year's example, or inspecting, and perhaps improving on, a pre-existing index. Key index-worthy topics are listed, but this unusually circumscribed scope and predictability of form embolden Russell and McMaster to something much more specific: they also provide checklists of index headings likely to prove useful not just for a typical annual report but even for those appropriate to organizations in a number of different business sectors. Such an unusual feature reminded this reviewer of how often those of us indexing predominantly within a particular discipline can find ourselves reconstructing a cross-reference structure, largely duplicating one built for a previous book, which could therefore in principle be imported wholesale and would need only small adjustments to reflect differing authorial preferences.

After describing the types of annual report, there is an effective demolition of the idea that permuting a table of contents into an alphabetical sequence will adequately serve the reader, as for example when it might preserve phrases like 'our mission' rather than 'mission statement', and leave 'staff' separated from 'employee' issues. The guide then turns to types of index, before explaining choice of entry and familiar elements of index structure (headings, subheadings, locators and cross-references) and compilation. Given its length, advice has mostly to be briskly prescriptive rather than discursive – 'There is no way round the fact that you will have to read every page' precedes a debunking of various misapprehensions about semi-automatic index compilation – so it was a surprise, even in the brief discussion of prepositions in subentries, to find the authors' usually unambiguous advice faltering momentarily.

The introduction explains that the source of examples drawn from real indexes and criticized will not be identified, but the book concludes by citing three report indexes that the authors can recommend.

A workmanlike two-page index is provided (for 42 pages of text), and is unafraid either to post under the metatopic or to employ single subentries, although I did not warm to what I assume are Antipodean indentation conventions that, with an em-space for subheadings and an en- for turnover (the text confirms these as deliberate choices), reversed SI conventions and made the index look rather inside-out to my eyes. Nevertheless, I am sure the guide amply fulfils its claim to help the novice annual report indexer through his or her first assignment, and its unwavering focus on fundamentals may even have a wider relevance. Russell and McMaster make the case for indexing with clarity, economy and firmness: a model for any indexer called to defend the profession, regardless of nationality or bibliographic form.

Bill Johncocks, freelance indexer

The accidental taxonomist. Heather Hedden. Medford, N.J.: Information Today, Inc., 2010. 442 pp. ISBN: 978-1-57387-397-0 (pbk). US\$39.50.

For someone coming to taxonomy through indexing, understanding the subtle differences between the two disciplines might be a challenge. If taxonomy is defined as 'the practice of naming and organizing things' and indexing is 'identifying and organizing names and concepts', then the common ground is immediately apparent, with only the emphasis on 'concepts' in indexing marking the divergence. Indexers are indeed thinking about their own taxonomy in the initial stages of starting an index, even if they do not think of it as such. This 'accidental' discovery of taxonomies is where Heather Hedden begins.

So a taxonomy is a support for indexing. Hence, for indexers who may have been compiling taxonomies in their heads as they index, Hedden's book is a practical reference for the avoidance of confusion during the indexing process. Indexers may encounter taxonomy accidentally, but there is nothing at all accidental about this author's writing. Her subject is covered in plain language, with an encyclopedic thoroughness, making this an essential acquisition for newcomers to the field and useful for the experienced professional needing to fill a few gaps in their knowledge. The amusing epigrams beginning each chapter serve to remind us of taxonomy's place in the real world and not just an abstract tool divorced from any wider interaction.

Beginning with definitions, Hedden distinguishes taxonomies, or hierarchical classification systems, from controlled vocabularies, thesauri and ontologies. Then the applications and purposes of taxonomies are covered in a detailed discussion of how taxonomies can support consistency in indexing. A history of the term includes its roots and the explosion of its usage as a 'hot topic' for librarians and indexers in the 1990s.

So who are taxonomists? Like indexers, taxonomists are split between full and part-timers, and also like indexers, they may have a background in library science and/or indexing which, in the absence of any taxonomy certification, provides the best preparation for this kind of work. Hedden describes over a dozen skill

sets required by anyone considering getting into this and related fields.

In the chapter on creating terms, the section on 'identifying concepts' should be very familiar to indexers, though it is not identical to indexing, where meticulous searching for concepts requires a greater understanding of the text beyond mere lists of contents. In a taxonomy, the selection of terms should match the original text with the term most likely to be selected by the user. The author's examples of the types of synonyms that may need to be chosen between include:

- doctors/physicians
- movies/motion pictures/films
- cars/automobiles/motors/autos.

Relationships between terms are divided into three categories: equivalence, hierarchical and associative; and from there many examples are provided to amplify the terms used. For example, for the preferred term 'oil and gas industry', the author offers seven possible non-preferred terms. Lest we are caught in the trap of seeing how many non-preferred terms we can find or create, guidelines are given to contain the length of lists to maximize user benefits.

An entire chapter is devoted to software for taxonomy creation and management. This takes us from basic spreadsheets to highly specialized software, with detailed charts and discussions on how to exploit the strengths of each.

The relative advantages and disadvantages of creating taxonomies for human as opposed to automated indexing are discussed in detail in two chapters. If you are concerned about the increasing

role of technology in publishing, here is a detailed discussion of the human versus machine debate which explains why both will be needed for the foreseeable future: humans for their skills in the selection of concepts, and automatons for processing the massive volumes of data associated with the organization of, for example, government records or news items. If you have ever been confused by the distinctions between the terms tagging, keywording, cataloguing, classifying and indexing, all is here made clear.

Structures of taxonomies are examined through hierarchies, facets and categories, emphasizing how these alternatives are not mutually exclusive. While it is important to have well-selected terms, the overall structure is equally crucial. If a taxonomy is a structure for organizing knowledge, it must itself be carefully organized. Then, once the terms and structure are in place, the display of the information needs to be considered. That taxonomies may not always be fully displayed to the end-user raises a discussion of end-user requirements and the different types of displays that are possible: alphabetical simple lists, alphabetical flat formats, full term hierarchy, top term hierarchy, and permuted (rotated) indexes.

The closing chapters cover taxonomy planning, design and creation, plus implementation and evolution, before finishing with a review of taxonomists as contractors, the training of taxonomists, and organizations, networking, and resources available.

Each chapter gives charts and examples to further amplify the text. In addition to endnotes with her research sources, Hedden has provided a detailed five-page recommended reading list, seven pages of websites, and a 24-page double-column index.

Michael E. Jackson, freelance indexer

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