

# Melbourne Indexers Bulletin

No. 12, June 2016



## American Society for Indexing Indexing Society of Canada :: Société canadienne d'indexation Conference, Chicago, Illinois, June 16-18, 2016 "The Drama of Indexing"

Chicago is a big modern city with most buildings built since 1870 as a large fire all but destroyed the city. It prides itself on its architecture. This was the home of Frank Lloyd Wright and several key US and international architects have built here. On the shores of Lake Michigan, it has the reputation of being windy, but it was the heat I had to cope with. Of course days were cooler during the conference, but hot before and after. The Art Institute of Chicago has a wonderful art collection. All this set the scene for an enjoyable visit to Chicago.

The venue for the conference was a central conference venue. Accommodation was available onsite or at other city locations. This was a joint American and Canadian Conference. There were about 110 attendees with the vast majority from the US and about 17 from Canada.

### Thursday

While there were training sessions organised today, the conference started

for me in the afternoon chairing the ICRIS meeting. There was a great turn out with representatives from indexing societies in South Africa, Netherlands (and Germany), UK, Canada, China, US and Australia. This was an informal meeting. Most of the time was spent with each representative sharing news from their society. Minutes will be available at <http://www.theindexer.org/icris/>.

The welcome reception was held in a hall on the 10th floor of the Fine Arts Building. Built for the Studebaker Company in 1884–85 it is now set up as individual artists' studios. Lots seemed to be used by musicians as music was wafting around. The old lift was human operated. Wonderful views over the lake.

International representatives introduced themselves to the gathering. It was also an opportunity to purchase the two new ASI publications: *Indexing tactics and*

*tidbits* and *10 Characteristics of quality indexes*.

### Friday

One topic of common interest at the ICRIS meeting on Thursday was training and mentoring. This led nicely into the first session of the conference on mentoring. The panel consisted of mentors and mentees (or protégés, as some prefer to call them). They spoke of mentoring in general and typical mentoring in other professions, past informal mentoring arrangements, personal experience of being a mentee and seeking a mentor. Jenny de Wet also spoke on the new formal structure for mentoring set up in South Africa. The important thing with mentoring is that it is driven by the mentees, not the mentors. The relationship is based on trust, mutual respect and sensitivity. This was a useful session in highlighting the many different forms mentoring can take.

Indexers took on different skills in the next session as Larry Sweazy spoke about his crime fiction sleuth, a female indexer in the 1960s. She has featured in two books *See also murder* and *See also deception*. Larry is an indexer as well as a writer and he explained how he got into indexing and how he juggles indexing and fiction writing on a daily basis. In a well organised way, he completes a required number of pages for both writing and indexing each day so both are completed by the deadline.

Jenny de Wet conducted a verbal survey of indexers and publishers to determine quality control for indexers in South

Africa. By this she meant facilities for indexers to check the quality of their index once it was typeset. This allows indexers to make sure it has been set correctly and make necessary changes. While some indexers and publishers encourage this approach, others did not.

Gale Rhoades had some very practical advice for dealing with diacritics and symbols. For each new project create a test file of the diacritics or symbols you will be using. Use the software and methods you plan to use for the index, output the test file and create a PDF of the file. Check both are as you expect. Now send the file to the editor/publisher and ask them to check that both files look correct for them too in the software they are using. This simple test can highlight problems early and confirm what you are going to do will work when you send the finished index.

Unicode is the standard for all diacritics and symbols. Each indexing software handles Unicode differently. In some cases you may be given a substitution table or asked to load a particular font that handles the required diacritics. As Gale stressed test all methods first and confirm with the editor/publisher it is as they expect early on in the project.

A case study of bilingual, multi-volume team-based project sounds complicated enough, but added to this was the extremely emotive nature of the work being indexed. They were the reports of the National Centre for Truth and Reconciliation, Canada. Some background

from their website

<http://nctr.ca/about.php>

“For over 150 years, residential schools operated in Canada. Over 150,000 children attended these schools. Many never returned. Often underfunded and overcrowded, these schools were used as a tool of assimilation by the Canadian state and churches. Thousands of students suffered physical and sexual abuse. All suffered from loneliness and a longing to be home with their families. The damages inflicted by these schools continue to this day. In 2009, the Truth and Reconciliation Commission of Canada began a multi-year process to listen to Survivors, communities and others affected by the Residential School system. The resulting collection of statements, documents and other materials now forms the heart of the National Centre for Truth and Reconciliation.”

The resulting reports from the NCTR needed to be indexed. The reports are published in English and translated into French hence two complete sets of the multi-volume reports needed to be indexed. Some volumes were over 800 pages. The English volumes were indexed first and then the French. Initially the index was translated and then given to an indexer to update the page numbers. It was pointed out that this didn't save the indexer time and it would be quicker not to have the index translated and let the indexer start from scratch. With such a large project several indexers were involved and this resulted in standardisation of how things, such as the schools and people mentioned, should be

indexed. All the indexers found the task extremely emotional and were glad they had each other and understanding partners to help ease the emotion. The reports are available as PDF files here <http://nctr.ca/reports.php>

David Ream spoke about a distributed, modular workflow to indexing textbooks. This involved textbooks for the national curriculum for year's 5 to 8 science. The publisher had core material on the various topics covered and these lessons could be reshuffled for different states and sometimes state specific material was added. How could this be done and indexed efficiently? Each lesson is about 4 to 6 pages and had its own index. An Excel spread sheet was used to list things like the details of the lesson, whether it would be modified or used as is, file name, page numbers in final book, etc. Using specifically designed software the index could be created in CINDE with coloured coding indicating which pages had been modified and which had been rewritten. This approach speeded up the indexing process considerably.

The awards dinner was at Heaven on Seven, a Cajun restaurant on the seventh floor of an office building. Obviously a well-kept Chicago secret as the food was great.

There was no American Society for Indexing/EIS Publishing Award for Excellence in Indexing this year, as no index met the required standard. This year they had a new method for submission. To keep the costs down all books had to be submitted in PDF format

with index. This apparently worked well with some indexers commenting it provided useful contact with their publishers.

The Canadian Ewart-Daveluy Indexing Award for excellence in indexing was awarded to Mary Newberry for her index to *The Letterbooks of John Evelyn, volumes 1 and 2*, edited by Douglas D.C. Chambers and David Galbraith and published by University of Toronto Press. Sample of the index is available using Look Inside feature at <https://www.amazon.com/Letterbooks-John-Evelyn-Douglas-Chambers/dp/1442647868>

The Canadian Tamarack Award is to recognise ISC/SCI members who go “above and beyond the call of duty” in their volunteer work for the Society. This year it went to Mary Newberry.

The Web & Electronic Indexing Special Interest Group of the American Society for Indexing award for excellence in website and electronic indexing was awarded to Dr Doug Lowry, from the US for his index to *Catholic Q and A: Essentials of the Faith Explained by Father Ray Ryland* ebook with MarpX search engine.

### Saturday

Dominique Raccah, founder of Source Books, gave the first paper. She explained the interesting things that Source Books have developed over the years and what has worked and what hasn't. For example, she is keen on poetry, so they published poetry with a CD of someone reading the poem. It turned out to be popular. This

moved on to the app Shakesperience, exploring the plays and using key actors from the Royal Shakespeare Company.

Realising they are producing for readers not the retailers, was a big shift for the company and resulted in them listening to authors more as well. One children's author showed them how readers were adding photos, train tickets and other material to her book, i.e. they were personalising the book. Source Books developed the personalisation idea and tried it out with an app, but it didn't work as readers wanted books to keep. So they made books that could be personalised. So now you can buy a book for someone specific, add their name to the book, add their photos, and I'm not sure what else. The book is printed and the child gets a personalised story mentioning them! Put me in the story is the result <http://www.putmeinthehistory.com/>. This has been a great winner.

The next development is picture books with separate apps that use augmented reality features. This means you open the app, wave your iPad over the book and you see the bird flying through the illustration on the page. These will be out soon.

These examples highlighted their iterative innovation approach.

Another area explained was how publishers are providing material directly to customers. This doesn't just mean books, but associated items of interest to their readers. For a craft publisher this may be providing a single pattern, rather than having to buy the whole book and

also providing the kit to make it. For a business publisher, it may be promoting events where their authors are speaking.

This is changing the world for publishers. A new approach to responding to requests is we don't do that 'Yet', rather than saying 'No'.

I enjoyed this session as it showed how publishers are changing from just publishing books to considering what their readers may like to keep them interested in their company products. While the session didn't really show direction for indexers, it showed how publishers are using reader data in different ways and they would benefit from people with indexing skills to arrange the data in useful ways.

Publishers' round table involved John Magee from Cengage Learning, Chuck Knapp from Bloomberg BNA and Ted Trautmann from Walter Kluwer. All were involved with non-book indexing within their companies, such as indexing legal legislation or journal indexing. It was interesting to learn how they recruit indexers for their in-house indexing projects. One method is to give applicants an article to be indexed and see how they go about indexing it.

Kamm Schreiner the developer of Sky Index indexing package presented his session via Skype. He is just about to launch Professional version 8 and was keen to demonstrate the new features. The changes look good and early indications are the upgrade price will be similar to the price from version 6 to 7. Rather than go into detail I refer readers

to *ANZSI Newsletter* (2016;12(3):6) for a summary of new features prepared by Michael Wyatt.

Cheryl Caballero gave a short presentation on how the web index to the Canadian Hansard was modified to make it accessible to those with disabilities. In most cases it was adding code so the webpage could be easily read by machine readers for the vision impaired. Web indexers should examine their website and follow their lead to make the index more accessible.

Mary Newberry, from Toronto, spoke of her own neighbourhood oral history project in Harbord Village. It all started when they decided to name the small lanes at the back of the houses. This prompted the local residential group to decide to name them after past residents. The memories of past residence and life in the area flowed and the need to formally capture these was recognised. About 100 interviews of about one hour or so each were recorded. These were then transcribed and Mary was contacted to index them. She settled on a three level structure. First up was a broad topic, say businesses, next level was name or organisation, say Brunswick Fish Market. Third level was free for all. Here they cut and pasted bits from the transcript, ending with interviewee's name and time code. So third level may be 'bring home fish/carp, swims in bath tub, Rae Gold 0:17:00'.

As Mary said, this made it quite a quick process as you were just "sorting laundry". Several indexers were involved

and the index can be seen here.  
[http://harbordvillagehistory.ca/hvhistory\\_oralhistory\\_detailedindex.html](http://harbordvillagehistory.ca/hvhistory_oralhistory_detailedindex.html)

This is a great example of how a mammoth task can be easily broken down into a manageable indexing task. By establishing a good structure, other volunteers can assist with the indexing without much training. The project has continued and to promote the oral histories, signs have been made and placed at locations of interest. Using a QR code someone passing can access the appropriate audio.

Lee Berry from the Chemical Heritage Foundation also spoke about indexing oral history. This time it was interviews with key people in chemistry and chemical engineering. All the interviews are now in digital form and have been transcribed. The transcript has its own index. The index to most transcripts is lacking in detail and could be greatly improved. The dilemma is how best to proceed to make the transcripts more accessible to users.

### Sunday

As an extra the Conference organisers arranged a group booking on an architecture cruise of Chicago. It was an enjoyable cruise up and down the rivers having the history of the buildings explained to us. It was a hot clear day and the reflections in the glass buildings was an added bonus.

This concluded the conference. I enjoy going to conferences as they are a great opportunity to chat with like-minded people, learn new tips and tricks, admire

the work of indexers on challenging projects and return with new ideas. This conference ticked all those boxes for me.

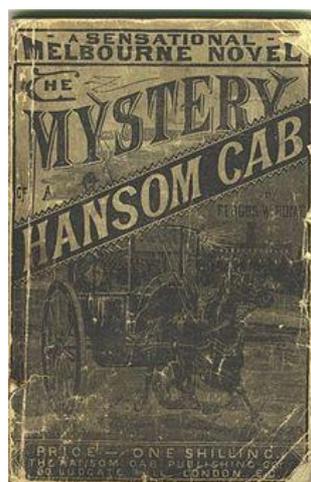
If this experience sounds interesting, why not plan to include an indexing conference in your next year's travels. ASI are planning their 2017 conference in Boston in around early May 2017, and ISC/SCI are planning their 2017 conference in Montreal in late May or early June.

*Mary Russell*

### Rare Book Week

Don't forget to see if there is something of interest in the program for Rare Book Week 14–24 July.

There is a tempting mix of talks on old wine books, to a walking tour of places mentioned in Fergus Hume's 1886 detective book *The Mystery of a Hansom Cab* or perhaps visit one of the exhibitions.



## Melbourne Indexers meeting — May

### Updating indexes and IndexConvert

Melbourne Indexers gathered in Malvern Library for a demonstration of IndexConvert. Before I explain the program let me set the scene.

You are contacted by an editor/publisher to update an index. Here are a couple of scenarios.

- a. They have prepared a new edition to a book. There may only be a few changes or it may have a few new sections added.
- b. You have been asked to prepare an index to this year's annual report for a government department and they expect the content to be similar to last year's annual report.
- c. A publisher has an English or US edition of a book and they have made small changes for their Australian edition and require an updated index.

In all these cases you have been given or have access to the previous index. It may be as a PDF or it may in a form that can be read by MS Word.

What do you do now? Again there are a couple of possibilities.

1. You can treat the job as a new index and create the index from scratch in the usual way.
2. You can take the PDF or MS Word file and manually massage it into a form that can be imported into your indexing software package.

Then update the entries and page numbers as required.

3. You can use IndexConvert to speed up the conversion process. Then update the index as required.

Why would you consider importing the index?

- Having the previous index loaded in your indexing software can save you lots of time.
- You do not have to type in all the entries.
- Your indexing task switches to a check and update page numbers task.

All this sounds wonderful, but like everything there can be catches. It all hinges on the quality of the previous index and how much the text has altered from the previous edition.

Firstly, sit down with the new text and the previous index. Go through it carefully and assess the quality of the index. Are you happy with the subject entries chosen? Do you feel you would need to change most of the headings or would it form a useful basis on which to develop your new index? Answers to these questions will help you choose if you want to take options 2 or 3 above or just go with option 1.

Let's assume you decide to convert the index, what is involved? If you have a PDF file you need to cut and paste the index into MS Word and probably work through it to make sure subheadings have been indented as required, etc.

To convert an index manually requires you to do different things depending on the indexing software you use. Each package has a preferred format the index needs to be in, so it can be imported in the correct way.

For Macrex coding needs to be added so it recognises subheadings and locators. The format is: main heading, subheading, locators.

For Sky each entry needs to be in the form: main heading tab subheading tab x. where x is only one locator.

This is where IndexConvert can assist. The MSWord add-on has been developed by English indexer Barry Campbell. He developed it for CINDEK and demonstrated a very rudimentary version of it at the Society of Indexers conference in York last year. Since then he has worked on it so it can output into Macrex and SKY as well. Sixth months down the track and the package has come a long way. It is still being modified and updated.

So what does it do? I'll give you a brief overview and then suggest you gain further information from the website <http://indexbase.co.uk/IndexConvert.html> or even get a demonstration version to see how it works in greater detail.

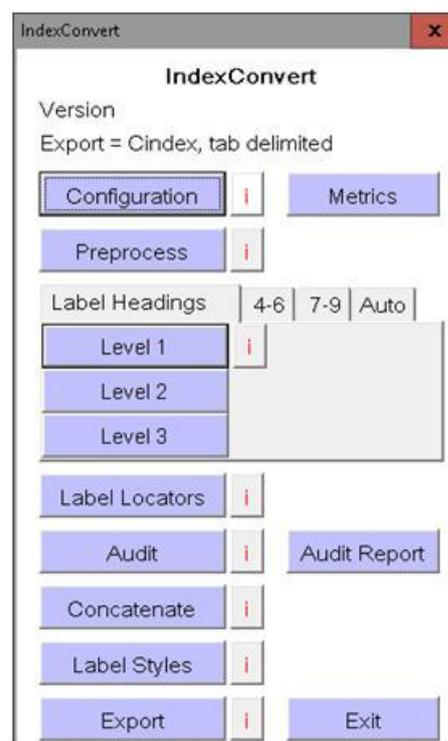
You need to start with the index in MS Word saved as a .DOCM file. Indexes come in all sorts of styles and layouts. The index needs to be edited into the format required by the program. Some of the things required include:

- Remove page headers and footers
- Remove introductory notes

- Remove continuation notes
- Separate multiple *see* or *see also* references
- It is likely to hiccup if there are numbers or dates in headings. Consider adding extra letters, such as QQ to these and remove later.
- Check for the use of any special characters.

A check list is available to remind you what needs to be done. Additional tools are also available to convert run-on style indexes to set-out style.

Having edited the index into the format required you are now ready to load and run the MS Word add-on. You then see the following screen:



- Configuration relates to your licence key and where you select export format required, such as SKY.

- Preprocess removes additional lines and checks if additional modifications are necessary.
- Level 1 asks you to confirm if a heading is a main heading. This can include *see* references. It then adds code to all main headings.
- Level 2 asks you to confirm if an item is a subheading. It then adds code to the beginning of each subheading.
- You then work your way through additional levels as required.
- Label Locators asks you to confirm what is a first locator. It will go through and pause at anything it finds different. For example a subheading ending in ? Again it adds code to the first locators.
- An audit will check if anything is odd and tag things it finds as errors. These need to be fixed manually.
- What the package does in subsequent steps depends on the export version (CINDEX, Macrex or Sky) you require.

Max McMaster kindly worked through each stage with an index he had prepared. He worked through the editing required for the index in MS Word and then showed how to load and run the IndexConvert add-on. Working through each step highlighted how the program worked. He then imported it into Macrex and showed how to fix the couple of modifications he had made to cope with numbers in subheadings.

Full details of the steps and specifications can be found in the brochure and the manual available at <http://indexbase.co.uk/IndexConvert.html> in downloads.

I have recently been asked to update indexes to two previous editions. Both were academic texts with indexes of roughly 1,800 and 2,100 entries. In both cases I only had the PDF of the previous index to work with. In the first case it took me about two hours to take the index from PDF into MS Word, run IndexConvert and then import into Sky and about one and a half hours for the second. In both cases there were a couple of things that I had to work around. For example, one book had locators for colour images entered in the form 'Plate 4'. I changed 'Plate 4' entries to '500' (page number larger than text) and edited the entries later in SKY. In both cases I felt I saved considerable time compiling the index and was glad I had used IndexConvert.

As I mentioned the program is still being updated and it isn't quite perfect yet, but it is definitely worth considering if you are updating indexes fairly regularly. There will be a review of IndexConvert, written by Lucie Haskins, Pierke Bosschieter and Max McMaster, in a future issue of *The Indexer*.

Having imported the previous version of the index into your software package, how do you update the entries? What sort of decisions do you have to make? It was suggested that we tackle this aspect of updating an index at a Melbourne Indexers meeting next year.

*Mary Russell*

## Upcoming meetings

<p><b>Wednesday 3 August</b></p> <p><b>Editing the ANZSI Newsletter index</b></p> <p><b>6 for 6:30 Holy Trinity Anglican Church Hall, Kew</b></p> <p><b>7:45 meal at Café La Q</b></p>	<p>Twenty years of newsletters, several indexers and what do you get? While it isn't a dog's breakfast, there is quite a lot of editing to be done. Most is obvious. Names need to be checked, typos, entries need to be in the form decided, etc.</p> <p>There is variation in how some types of articles have been indexed. Please come and provide guidance on how things should appear in the index.</p>
<p><b>Wednesday 5 October</b></p> <p><b>What was your most challenging index?</b></p> <p><b>6 for 6:30 Holy Trinity Anglican Church Hall, Kew</b></p> <p><b>7:45 meal at Café La Q</b></p>	<p>What was your most challenging index? What aspects of the job made it challenging? Perhaps it was your first job, the clients were difficult or the book itself was massive or intellectually challenging. Come and share your experiences. Who knows what will be discussed?</p>
<p><b>Wednesday 7 December</b></p> <p><b>How are books constructed?</b></p> <p><b>6 for 6:30 Holy Trinity Anglican Church Hall, Kew</b></p> <p><b>7:45 meal at Café La Q</b></p>	<p>Have you ever made your own book? After a brief discussion on the process of how a book is bound there will be a chance to make your own simple booklets from sheets of A4 paper.</p>

Contributions to *Melbourne Indexers Bulletin* are welcome at [melbourneindexers@gmail.com](mailto:melbourneindexers@gmail.com)