

Melbourne Indexers Bulletin

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March meeting

Indexes in MS Word: embedded versus hyperlinked

Using MS Word it is possible to create embedded indexes and hyperlinked indexes. Both use different features of Word. The aim of the talk at the Melbourne Indexers meeting in March was to compare embedded and hyperlinked indexes and explore how indexing software can be used to assist.

Embedded indexing, sometimes referred to as XML indexing, is often requested by publishers, such as CUP. It uses the index features within Word and adds tags (called field codes) to the text. The index generated has a predefined format and style that can only be slightly modified.

Hyperlinked indexes use the hyperlink features within Word. Locators can be hyperlinks to a specific page within a PDF file on the web or a bookmark to the specific place within the Word file. You can set the index out as you would like, and the file can be converted to a linked PDF document.

EMBEDDED INDEXING

Advantages

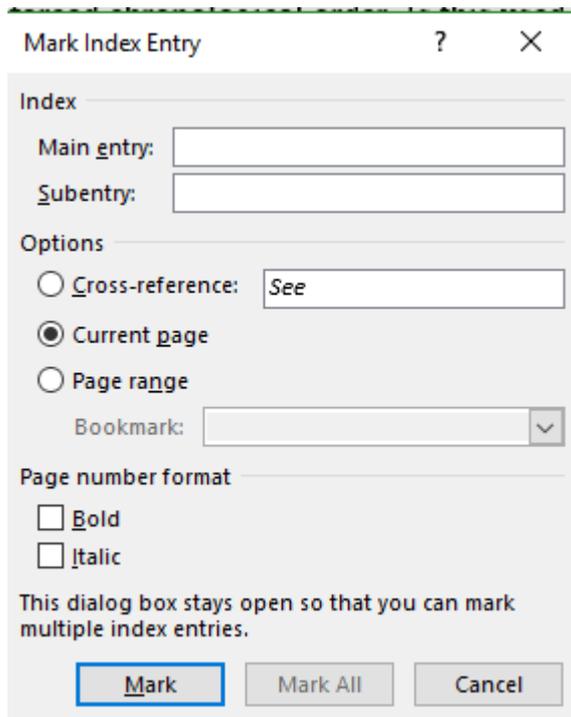
- Embedded indexing can be done earlier in book production process, even before the pages are set out.
- If pagination alters the index just needs to be re-run, not re-done.
- Embedded indexing will work if material published in print and electronic forms.
- The tags stay with the text, so chapters can be recombined to form a new book.
- Some aspects can be automated.

Disadvantages

- Tags can be lost with clumsy editing.
- Word restricts how the index will look.
- Limited control over sorting of entries.
- Page ranges require bookmarks.
- Indexing in Word can be more challenging and time consuming.
- The index entry doesn't link or jump to text.
- Any modifications to the text or layout of the generated index is lost when it is updated.

Index field codes

When you fill in the 'Mark index entry' box the following code is added to the text:



- For a main heading {XE "main heading"}
- For a subheading {XE "main heading: subheading"}
- For a bold page number {XE \b main heading: subheading"}
- For a page ranges you need to create a bookmark for the page range required and give it a name. I preface all indexing bookmarks with an i. {XE "main heading: subheading" \r "imainsub"} where imainsub is the name of a predefined bookmark for the page range required.
- For cross references {XE "main heading one" \t "See cross ref one"} or {XE "main heading two" \t "See also cross ref two"}
- It is possible to manually modify the field codes within the text. For example:
 - To add sub-subheadings {XE "main:subheading:sub-subheading"}
 - To force sorting {XE "McDonald;MacDonald"} will sort McDonald as id MacDonald.
 - To create a separate author index by adding \f "A" tag to all authors {XE "Russell, Mary" \f "A"}
- Mark All button does exactly what it says and adds field codes for each time the text in the Main entry field occurs in the text. Perfect for creating a concordance.

For further details on how to use the index features in Word, troubleshooting (particularly the articles by Seth Maislin) and reviews of other software packages to assist with embedding look at the list of references on the ANZSI website <https://www.anzsi.org/resources/reading-lists/types-of-indexes/#embedded>

Using indexing software to assist

SKY and Cindex can be used to streamline the embedding process, by just adding an additional step to the end of the usual way an index is prepared. I gather what I am describing isn't possible using Macrex. I use SKY and find that the ability to drag and drop index entries into the Word document makes embedding indexing much easier and less prone to error. I prepare the index in the usual way without grappling with Word Index entry boxes and the other hassles of preparing an index using only Word. Sure, it adds a few hours work to completing the index, but I find the task of embedding

the index entries quite robotic and as a result I turn the music up and enjoy myself with a robotic task. Along the way, I occasionally find an index entry that could be improved or deleted.

Here is the workflow I use:

- To prevent accidentally modifying the original Word file while indexing I save the file as a PDF and use that to index from in the usual way.
- Index and edit your index using indexing software as normal using the page numbers in the PDF document.
- Display the index in page number order.
- Open the Word document.
- Drag the index entry from the indexing software to the correct location in Word.
- This creates the XE field in Word and should take any bold/italic information or sort override information into Word.
- Page ranges need the extra step of creating a bookmark for the required page range and adding the /r information manually in the XE field. As the documents I typically receive already contain hundreds of bookmarks, I preface mine with the letter i.
- Can transfer *see* and *see also* references in the same way.
- Insert the index at the end of the document and update regularly to make sure there are no errors.

Consult your software manual for tips on the process.

HYPERLINKED INDEXES

Hyperlinked indexes in Word require a different process. An example is the index to the first 20 years of the ANZSI Newsletters. They can also be created for a specific document created in Word. For example, an annual report, software manual or any document that you want to publish as a PDF.

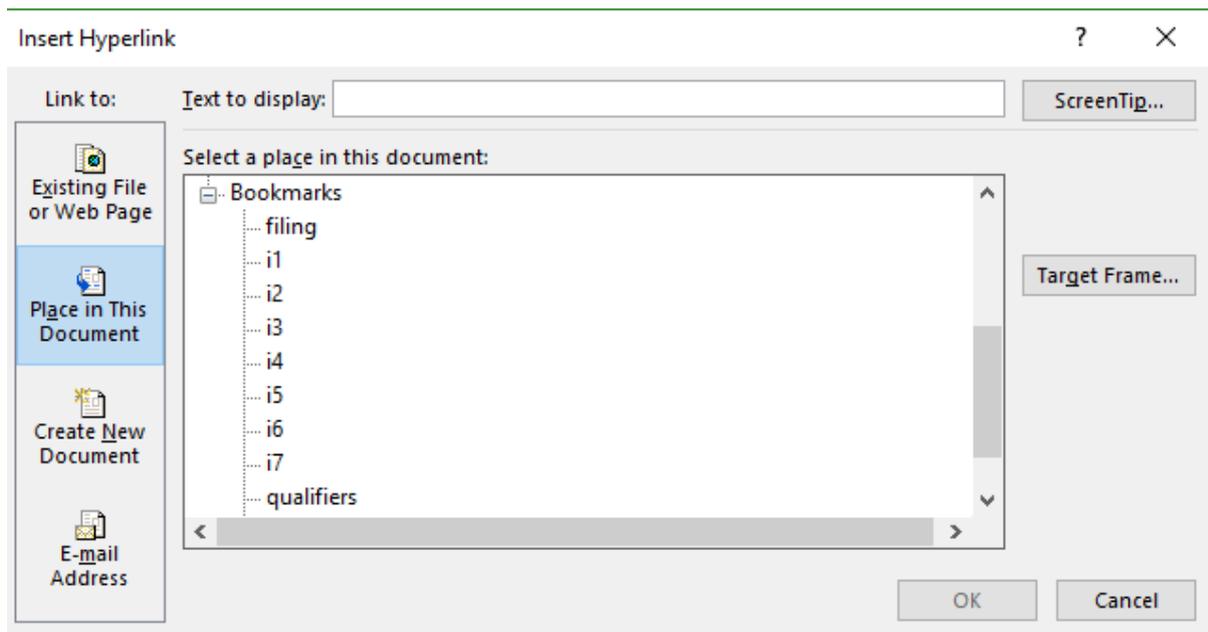
Index page numbers are hyperlinks and jump to sections within the document or, in the case of a journal index, open PDFs on the web to required page. In the same way you can create links to websites in Word you can create hyperlinks to specific sections of a document. *See* and *see also* references are also hyperlinked. An important thing to remember is do not use Word index features.

Unlike embedded indexing, you need to index when you know the layout isn't going to alter. You create bookmarks where you want the index locator to go to. You could use pages, section headings or paragraphs. As with embedding, I suggest you preface the name or number of your bookmark with an i, e.g. i7.

Hyperlinks

Each hyperlink has two parts; the web address or bookmark name and the text you want displayed as the link.

- To within a PDF on website
<https://www.anzsi.org/wp-content/uploads/2018/01/MIB-Nov-2017.pdf#page=3>
Combination of website address for PDF file and # tag to page number 3 within the specific PDF file.
- To within the document
file:///c:/users/mary/documents/cmos_links.docx#i1
Combination of the address for the location of file working on and # tag to predefined bookmark named i1 marked within the document. The bookmarks 'filing and 'qualifiers' in the example refer to bookmarks for *see* or *see also* references. Take care not to mix hyperlinks using bookmarks and headings.



It is possible to create the index to the Word document in the normal way using your indexing software. Generate the RTF file and cut and paste it where required within the document. Using search and replace features or specific macros you can update all the locators to predefined bookmark hyperlinks created for each page.

Alternatively, you use your indexing software to create a hyperlinked index in a similar way I described for the *ANZSI Newsletter* index (see *Melbourne Indexer Bulletin* 2017(26):1–5 <https://www.anzsi.org/wp-content/uploads/2017/11/MIB-Sept-2017.pdf>) using full bookmark location details instead of web addresses.

If the page layout alters the bookmarks will move too. The links will still go to the correct place, however the text for the link may be wrong. For example, text moves from page 5 to page 6. The link will go to page 6 but will remain as 5.

One final tip for hyperlinks using bookmarks. When you Save As the Word file as a PDF you need to delve into 'More options' and click 'Create bookmarks using Word bookmarks'. Otherwise the link in PDF file will be trying to open your Word file and go to the bookmark in the file, or you will get an error message saying the Word file cannot be found.

I have not seen this use of Word hyperlinks to form an index written up anywhere. Please let know if you know of any reference.

Mary Russell

An index by any other name: a collaboration in indexing

Fellow indexer Maryna Mews and I had been writing and editing a biography when an indexing job came Maryna's way.

It was from an eminent academic she had previously worked with, who has written extensively on race relations, leading to writing on Aboriginal and Torres Strait Islander (AATSI) sportspeople. His books have been timed to coincide with major Australian sporting events such as the Sydney Olympics in 2000 and the Melbourne Commonwealth Games in 2006. This one was to be published in time for the Commonwealth Games on the Gold Coast in April this year. Having worked

successfully with another indexer who was too busy this time to work with her, Maryna invited me to collaborate with her.

I had completed the UC Berkeley Indexing Theory and Practice course in 2016 – in my case, the emphasis being on the word ‘theory’. Since that time, I had only indexed three texts and felt a little out of my depth. I offered to index just the names.

The books consist of a short essay describing each sport, followed by biographies of outstanding AATSI representatives in each field. A piece of cake, I thought – just index each name and image and Maryna can do the hard ‘stuff’ with *see* references and so on.

Hmm. Little did I know what was ahead.

We were going to be given the proofs with less than a week to finish it. Maryna asked the author if we could have his working document in advance. As expected, the page numbers of his Word.doc text, around 380 pages, would not coincide with the final proofs. I put in false locators into my Cindex file as placeholders to give me an idea of how many locators I would need to include in the final index. I would send it as an rtf and Word.doc to Maryna who would collate the whole and send it to the publishers.

The author wanted the sportspeople’s names listed as a separate index. Sportspeople in the Hall of Fame were to be in bold and all honours (for instance, OAM, AM) were to be included. He also didn’t want *see* references or double postings in this part of the index due to considerations of space. Maryna sent me a copy of her previous one for him, which was a useful template.

The author’s original text was full of misprints, typos, inconsistencies and blanks where images were supposed to be inserted. We didn’t worry too much about that, as we had obviously been given a working draft – which was certainly better than nothing! Working through the names, however, brought to light some interesting issues.

How to index someone such as Frank Fisher when he was referred to in the book under many guises such as Frankie Fisher, King Fisher and Big Shot Frank, and when his father was also a Frank Fisher? I settled for Fisher, Frank Jr (‘Big Shot’) as this was how he was written up most frequently in the book.

Certain football teams were in the Hall of Fame and were therefore to be indexed in bold. The author categorically stated that, when there was an image of the team and the individual players were named beneath, the team was to be listed in bold but the player’s names were not to be indexed at all. However, some of these players had their own entries. It seemed odd to me not to list each individual but, at the author’s request, I left them out.

Another problem was how to index sportsmen from the nineteenth century who were only known by a nickname, and not necessarily a flattering one. Should they be listed as Mulga Fred or Twopenny? Even if their own Indigenous name were known, should they be indexed under their more commonly recognised acquired European name? I was pleased that my instincts matched the wishes of the author. I indexed them as Twopenny (Murrumgunrrimin) and Wilson, Fred (‘Mulga Fred’), inverted commas showing it was a nickname and the name out of brackets being the name a reader would look for. One particular sportsman likes to be known by both European and Indigenous monikers so, even though it made the index look inconsistent, I indexed his name as Bowditch, Steve Mangirri, with no brackets or inverted commas.

Some sportspeople are known by a shortened version of their name. To be consistent, I indexed them under their full name with the short version in brackets. If the short version was a corruption, it was in brackets and inverted commas; for instance, Freeman, Catherine (Cathy) and Dunn, Carmelita ('Karmi').

How were the married women to be indexed, under their maiden name with which they had achieved fame or their married name? Maryna's previous index showed me the way: Foster (Wilson), Eileen as the preferred option.

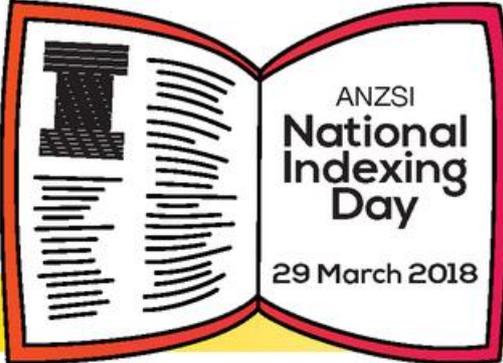
Another problem I faced was with well known and influential AATSI sportspeople such as Evonne Goolagong-Cawley who had eleven locators to her name. Did I include every reference to her in the text or did I skip passing mentions of her? And what about Pastor Sir Douglas Nicholls KCVO, OBE, KSTJ with ten locators taking up three lines of index? The author made it easy by asking for all references and honours, although that is somewhat unorthodox indexing practice!

The proofs arrived – sadly, poorly edited! Names were inconsistently spelled, honours were attributed incorrectly and inconsistently, some of the images were different to the original text we had been given and some had not even been acquired yet. (Indexing something that isn't there is a new one for me!) As Maryna and I are both editors, we had to doff our indexing hats for some considerable time and don our editor hats. Thankful for the internet, we were able to check the correct spelling of names and honours and send the list to the publisher.

Having gone cross-eyed over multiple Anderson, Burgoyne, Clark (or was it Clarke?), Crouch, Ella, Mullett, Roberts, Sands, Simon, Smith, Thomas, Walker and Williams entries, I reviewed the text three times, checking the spellings carefully, especially of names that I thought were unusual. The great benefit in collaboration was not only the division of labour but having a second pair of eyes. Maryna saved me (and the index) from one egregious error. Here is where a bit of topical knowledge would have helped me. I don't follow sport at all which meant that a famous and well loved AFL player whom I had indexed as Farnaklin was in fact a misspelled 'Buddy' Franklin!

In all, there were over eight hundred individual names and teams, with married names, nicknames and honours, various sports teams and Hall of Fame entries, not counting all the locators to index. As a newbie indexer, I don't know if this is a standard name index but I found it a useful exercise, and I enjoyed it.

Susan Pierotti



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Indexing the world of information

Professional tip – Hang on to your old indexes

You may think that once you send your index to the editor or author that is the end of the index's life. That is far from the truth. Old indexes are still valuable.

Firstly, and most obviously, you may get a query from the editor or author about your current index, so referring back to the index is essential. Secondly, if you are asked to re-index a subsequent edition of a text for which you have done an earlier edition, it may be possible to reuse the index or part of it. So if you can avoid re-entering some of the entries, you will save time. Lastly, if you are given an indexing job on a similar subject to one you have done previously, but from a different publisher, you may not recall how you constructed the entries on a particular topic. Being able to look back at one of your earlier indexes can be a lifesaver.

So don't send your old indexes to the Recycle bin. Let them live on, as they are a valuable resource.

Max McMaster

To be continued...The Australian Newspaper Fiction Database

This project involves the hunt for fiction in Australian newspapers digitalised on Trove. The details of how the index to the serialized fiction was developed and the search strategies employed was reprinted in *The Indexer* 2015(2):57–65.

The project has progressed. It featured on Radio National recently.

<http://www.abc.net.au/radionational/programs/the-hub-on-books/the-hub-on-books-tuesday-6-march-2018/9492298> and on the National Library of Australia blog

<https://www.nla.gov.au/blogs/trove/2018/02/28/to-be-continued>. Further details about the project, database and outstanding work can be found here

<http://cdhrdatasys.anu.edu.au/tobecontinued/>

Upcoming meetings

Date: First Thursday of the month

Venue: Hawthorn Library meeting room 1 (called Glenferrie), 584 Glenferrie Road, Hawthorn

Regular time: from 6.00 – 8.00 pm

Carparking is available down the side of the building. If you are travelling by public transport there is a tram stop nearby, and Glenferrie Station is just a couple of tram stops away.

After the meeting we will go to a local restaurant for a meal (at own expense). For those travelling by public transport, there is always plenty of space in members' cars to enable us to all get to the restaurant quickly. You will also be well located for getting home afterwards, with the train station and tram stops just a short walk away.

Thursday	Topic	Description
April 5	Five things you like to have at hand while indexing	You have the indexing software and a copy of the item you are indexing, what else do you require or like to have at hand to work effectively? It could be specific reference books or Apps, a touch screen, the Look inside feature on Amazon, or even chocolate or Panadol. Come and share your favourite five things.
May 3	Comparing indexes to biographies	The way indexers index the main character of the biography can vary from not having an entry under their name to placing everything under their name to something in between. Then the way the indexes are set out can vary. Suddenly subheadings are not filed alphabetically but in page number order or a forced chronological order. Is this used for all subheadings or only for the main character? How do you use your indexing software to file subheadings like this? Run-on style can be used for subheadings or even sub-sub-subheadings. With all these variations what features would be most useful to the biography readers? What indexing tips can we learn by examining various biography indexes? There will be examples to compare, however why not explore your bookshelves and bring along an example to share?
June 7	Five things from the indexing puzzle bag	The indexing puzzle bag contains a collection of topics we may puzzle over. <ol style="list-style-type: none"> 1. What is the common way to display page ranges? 2. How do you index book introductions or the long preface, particularly those with Roman page numbers? 3. How and why do you turn an indexing job down? 4. American spelling – traps for Australians. 5. How do you index concepts known in professions by acronyms or abbreviations? How do you file them?

Contributions to *Melbourne Indexers Bulletin* are welcome at melbourneindexers@gmail.com