Key Words

AMERICAN
SOCIETY OF
INDEXERS

Feature Article:

Indexing a Classic: Thoreau's fully annotated *Walden*, 2004

By Randall Conrad

ASI Officers, Directors, and Contacts

Officers
President: Enid Zafran (2004-2005)
  enid@indexingpartners.com / 703-207-9440
Vice-President/President-Elect: Maria Coughlin (2004-2005)
  mariac@indexing.com / 410-269-0978
Treasurer: Dave Ream (2004-2006)
  DaveReam@LevTechInc.com / 440-838-1203
Secretary: Carol Roberts (2003-2006)
  indexer@execpc.com / 414-964-5271
Immediate Past President: Frances Lennie (2004-2005)
  flennie@indexres.com / 212-633-0994

Directors
Colleen Dunham (2002-2005)
  colleendunham1819@hotmail.com / 206-329-4010
Julie Kawabata (2004-2007)
  jkawa@teleport.com / 503-524-1192
Fred Leise (2004-2006)
  locatelli@aol.com / 773-561-5211
Seth Maislin (2002-2005)
  seth@maislin.com / 781-641-1834
Kay Schlembach (2003-2006)
  schlem@hal-pc.org / 281-550-5959
Richard Shrout (2004-2007)
  rshrout@erols.com / 301-963-2591

Executive Directors
Francine Butler, *fbutler@resourcenter.com* / 303-463-2887
Jerry Bowman, *jbowman@resourcenter.com* / 303-463-2887

Committee Chairs
Archives: Al Austin, *aha@chesco.com*
Bylaws: Terri Hudoba, *tahudoba@juno.com*
Chapter Relations: Diana Witt, *dlwitt@concentric.net*
Hines Award: Sandra Topping, *sctopping@earthlink.net*
International Representative: Enid Zafran, *enid@indexingpartners.com*
Jobs Hotline/*Locator* Publicity: Linda Mamassian, *indexing@mamassian.com*
Key Words: L. Pilar Wyman, *pilarw@wymanindexing.com*
Membership: Ina Gravitz, *inagravitz@earthlink.net*
NISO Representative: Judy Gibbs, *jmgibbs@mindspring.com*
Nominations: Nan Badgett, *nbadgett@earthlink.net*
Organizational Memberships: Galen Schroeder, *galenschroeder@dakotaindexing.com*
Publications: Enid Zafran, *enid@indexingpartners.com*
SIGs: Melinda Davis, *abcdavis@comcast.net*
Webmasters: Nora Harris, *nharris@ix.netcom.com*;
    Lucie Haskins, *LucieH@worldnet.att.net*;
    Karen Lane, *klane@klane.com*;
    Carolyn Weaver, *CGWeaver@weaverindexing.com*
Wilson Award: Carolyn Weaver, *CGWeaver@weaverindexing.com*

Chapters and Groups
See the listings at the ASI Web site: *www.asindexing.org*.
All of the above persons can also be reached via the administrative office.

The American Society of Indexers

The American Society of Indexers, Inc., (ASI) is a national association founded in 1968 to promote excellence in indexing and increase awareness of the value of well-written and well-designed indexes. A nonprofit professional organization, ASI serves indexers, librarians, abstractors, editors, publishers, database producers, data searchers, product developers, technical writers, academic professionals, researchers and readers, and others concerned with indexing.

The only professional organization in the United States devoted solely to the advancement of indexing, abstracting, and database construction, ASI is affiliated with the Society of Indexers (UK), the Australian Society of Indexers, the Indexing and Abstracting Society of Canada, the Association of Southern African Indexers and Bibliographers, and the China Society of Indexers. ASI encourages participation of all persons, groups, and organizations interested in indexing and related methods of information retrieval.

ASI provides services to members on both the national and local levels. The national organization offers annual conferences, a professional bulletin, and member directories. Local chapters and groups offer regular meetings with knowledgeable speakers, professional development workshops, and informal gatherings.

ASI increases awareness of the value of high-quality indexes and indexing, offers members access to educational resources that enable them to strengthen their indexing performance; keeps members up-to-date on advances in indexing technology and the expanding role of indexing; provides members with a variety of means of communication; defends and safeguards the professional interests of indexers; promotes index standards for indexers, editors, and abstractors; and cooperates with other professional organizations in information science.

Contents

President's File

Summer Doldrums? Not for Indexers!

Enid Zafran

While most professions look forward to summer doldrums and a nice vacation, I, like many indexers, face the beginning of the busy season starting in July.

Locator

And it ended up a very wild season indeed, with a wide variety of calls generated from the ASI *Locator* listing of my business. For those of you who do not list your services in the *Locator*, I encourage you to sign up.

Based on my experience, the types of possible clients who use the *Locator* range from publishers to authors to nonprofits to construction companies.

I have had some great repeat customers who found me through my *Locator* listing as well as some interesting topics that I don't think I would have had the opportunity to index otherwise.

When I am contacted by a new client, I ask how they discovered me, and over and over the answer is, "The *Locator*"!

Inclusion in the *Locator* is a unique benefit to ASI members who choose to participate. Yes, it costs to have a listing, but it is the most cost-effective advertising I have ever done. When indexers ask me about promoting their businesses, this is one of the first vehicles I recommend.

ASI Training Initiative

We are moving forward to reaching an agreement with SI (the British Society of Indexers) to license their indexing training materials provided via an interactive CD for use by members of ASI and others in the U.S. indexing community. Our training committee is working on the materials to ensure a perfect fit for the American market.

In the coming months, there will be more news about our progress so be sure to check on the ASI website for announcements. We hope to commence enrollment in late spring 2005.

ASI Conference 2005

Maria Coughlin is planning a great schedule of events for the upcoming conference in Pasadena, California. She expects to have sessions to appeal to all levels of indexers, from beginners to advanced.

If you don't know about all the sites and fun things to do in the Pasadena area, look at *www.pasadenacal.com/visitors.htm*, which gives lots of information. If you liked Old Town Alexandria last year, you are sure to find Pasadena equally enjoyable as it has an older area of shops, restaurants, and theaters as well as an outdoor mall within walking distance of the hotel. Allow time to tour the Gamble House, built during the Arts & Crafts Movement, with the most stunning woodwork and stained glass; the Huntington Museum, whose gardens deserve an entire day of their own for viewing; and the Norton Simon Museum, which houses an amazing collection of Impressionist art. And, I encourage you to venture a bit further to see the splendid Getty Museum which offers a stunning vista over LA, landscaped gardens, intriguing modern architecture, and eclectic art. ⌐⎯

Editor's File

Loony Tunes for Loony Times

L. Pilar Wyman

For this fall issue of 2004 we have one of the best articles I have had the honor of receiving on behalf of ASI, "Indexing a Classic: Thoreau's fully annotated *Walden, 2004*" (*see* page 137). Many thanks to **Randall Conrad** for such a thoughtful contribution. I'm sure many of our readers will enjoy his account of working on the latest reissue of Thoreau's *Walden*.

We also have a couple articles on embedded indexing: "Indexing in FrameMaker Without Tearing Your Hair Out" by **Lucie Haskins** and "Why Embedded Indexes are Different, Not Better" by **Dave Prout**. Many of us are being asked to prepare embedded indexes these days. Embedded indexing is a medium we all need to be at least familiar with if not versed in.

We've also got a delightfully practical piece from **Nan Badgett** on how to index how-to books, "Lick the Needle, Not the Thread." Trade books can certainly be fun, and practical, to work on. (I have a 'thing' for maritime and naval books, and periodically raid the working bookshelf of my husband, the boatwright. He, in turn, periodically raids the portfolio bookshelf in my office, where I keep most of the boating trade books I've indexed. I can't say "all" as some appear to have taken up residence at the boatyard where he works, I'm proud to say.)

In addition, from **Kari Kells** we have the second installment in her series on indexer work methods, "How do I index thee? Indexers count the ways: Part II" with contributions from **Cheryl Landes**, **Seth Maislin**, **Cher Paul**, and **Kathy Sychra** (*see* page 124). **Robert A. Saigh** has also responded to this series and contributed a provocative article, "Index or Perish" on the impact of outsourcing on indexing work methods. I look forward to your responses to these pieces.

In the midst of this chorus of contributions, by popular request at the annual conference earlier this year, **Martha Osgood** has submitted two apt pieces on guidelines for peer reviewers and logistics for peer reviews. I'm sure we will all make good use of these articles.

Happy Indexing,
Pilar ⊙⟜

Always a sucker for birds, the editor, above, once had the pleasure of working with a baby blue jay rescued from neighborhood cats (photo by Maria Coughlin, 1980s). "Twit," later released in a wildlife sanctuary, enjoyed playing with my hair and 'talking back' to the computer. A pair of zebra finches, Snorlax and Pikachu, continue the tradition in my current office.

ASI Board of Directors Call for Nominations

ASI is seeking candidates for the following positions:

Vice President/President-Elect (3-year commitment)

Qualifications: previous service on ASI Board as an officer or director-at-large. Responsibilities: annual conference program.

Director (3-year commitment)

Qualifications: active members committed to ASI and willing to spend time regularly on ASI business. Requirements: attend two board meetings a year, one at time of annual conference, and another via conference call; committee responsibilities in areas such as awards, chapter relations, education, etc. There are openings for two directors this year.

If you would like to give back to ASI through service on its board, please contact Nan Badgett, Nominations Committee Chair, for more information: *nbadgett@earthlink.net*, 520-825-2892.

ASI News

Hines Award Call for Nominations

ASI is what it is today because of the contributions of its members. The Hines Award is one way in which ASI honors those who have made contributions to the organization. Winners have been instrumental in writing and editing books, in publicizing ASI programs and services, in the formation of chapters or SIGs, and in improving training for indexers.

Do you know someone who you think is worthy of this honor?

The Hines Committee requests letters telling us of these achievements. It is helpful if more than one letter is received about an individual, so please ask others to write letters in support of your nominee, as well.

The recipient, who should be a current or former active member of ASI, will receive a lifetime membership in ASI.

Previous winners include Bev Ann Ross ('95), Dorothy Thomas ('96), Hans Wellisch ('97), Bella Hass Weinberg ('98), Nancy Mulvany ('00), Linda Fetters ('01), Jessica Milstead ('02), Anne Leach ('03), and Robert Palmer ('04). No award was given in 1999.

The Committee will make its decision by April 1, and the 2005 award will be presented at the Annual Meeting in Pasadena in May. Committee members are Sandy Topping (chair), Sharon Hughes, and Kate Mertes.

Nominating letters must be received by **March 1, 2005** and should be sent to:

Sandy Topping, Chair
Hines Award Committee
2508 Pebble Beach Drive
Valparaiso, IN 46383-0400
Phone/Fax: (219) 465-3923
e-mail: *sctopping@earthlink.net* ⊶

ASI-L Mailing List

To join this list, go to: *www.yahoogroups.com/subscribe.cgi/ASI-L*.

All ASI members are invited to join ASI-L, an electronic forum for the administration of the American Society of Indexers (ASI). Topics appropriate for this list include ASI-related strategic planning; association policy and practices; volunteering requests; communication with the Board, committees, and other members; administrative announcements; and other issues relating to ASI functions. Subscription to ASI-L is strictly limited to current ASI members, but message content is unmoderated (with an expectation of no inappropriate or abusive language).

Mutual of Omaha Association Advantages

ASI and Mutual of Omaha are working together to provide economical insurance protection for you and your family. That commitment to helping protect your needs means you receive personalized customer service from Mutual of Omaha and a local representative. ASI's customized association insurance plans provide insurance coverage to you at reduced rates or with enhanced benefits not available to the general public. Together, ASI and Mutual of Omaha want to help you protect the things you've worked so hard to achieve.

Quality Products Backed with Experience and Service

Service is our top priority. A local Mutual of Omaha representative will help you select the coverage that will best fit the needs of you and your family. Mutual of Omaha is skilled in providing comprehensive, flexible insurance programs for individuals and families.

Choose a Plan that Fits Your Needs

- Disability Income Insurance (15% discount)
- Life Insurance (free riders)
- Critical Illness Insurance (free rider)
- Pension Plans
- Long Term Care Insurance (10% discount)

Consult the ASI website (*www.asindexing.org*) for up-to-date information, or for more information and to receive a free financial profile, contact a local Mutual of Omaha office. To find the office closest to you: *www.mutualofomaha.com*.

Passings
Julia Child, 1912-2004

We are sad to report the August 12, 2004 death of *Julia Child*, who died of complications of kidney failure. She was 91 years old.

As Regina Schrambling said August 13, she "was a towering figure on the culinary front for more than 40 years" ("Julia Child, the French Chef for a Jell-O Nation, Dies at 91," *The New York Times*).

She was born Julia McWilliams in Pasadena, California. In 1934, she graduated from Smith College in Amherst, Massachusetts. In 1942, she joined the OSS, where she worked as a file clerk. She worked for the OSS 1944. During that time she helped invent shark repellent and, as previously reported by Diane Worden in this bulletin (Vol. 5/Nos. 3&4, page 6), "she developed an appreciation for what could be found or hidden by manipulating the alphabet, an experience that also convinced her that indexers possess great power." In 1946, she married Paul Child, a fellow "OSSer" and epicure. In 1948, her husband was posted to Paris, France, and in 1949 she entered the Cordon Bleu cooking school and began her life-long love affair with French food and cooking.

In 1961, Julia Child published *Mastering the Art of French Cooking*, and in 1962, she launched the television series "The French Chef," which went nationwide and aired 206 episodes over 10 years. In 1980, she received the National Book Award for *Julia Child and More Company*. In 1989, she published *The Way to Cook* and by the 1990s, in her 80s, she appeared in three PBS TV series and published nine books.

In 1993, she was inducted into the Culinary Institute Hall of Fame. In 2000 she was awarded the Légion d'Honneur by the French government. In 2003, she received the Presidential Medal of Freedom. When she moved from her longtime home in Cambridge, Massachusetts to a retirement center in California, she donated her kitchen to the Smithsonian Institution, where it is now on display, and her huge cookbook collection to the Schlesinger Library at Harvard. She is also featured at the International Spy Museum.

Indexers know Child best from the 29th Annual ASI Conference in Winston-Salem, North Carolina, "Food for Thought," for which she was our keynote speaker. As an author and ASI member, Julia Child always felt that indexes are an important part of cookbooks.

She said in the foreword to *The Way to Cook*, "A reference or teaching book is only as good as its index."

Anne Leach said in this bulletin in 1997 (Vol. 5, Nos. 3&4, page 4), "It was enjoyable to meet and hear the popular and loved Julia Child, who appreciates the art of indexing."

Julia Child also served ASI as a general session panelist with cookbook indexers Elinor Lindheimer and Diana Witt in a panel discussion "Cooking Up An Index." She also actively participated in a pre-conference workshop "Cookbook Indexing" with Elinor Lindheimer the previous day. Participants in these sessions recall her passionate participation in discussion of how to index "hamburger" and other food concepts.

And yes, as Diane Worden reported, "the chefs all came into the hall for a bow to much applause" after the main conference dinner that year. One can only imagine how nervous they were cooking for Julia Child.

In an April 1998 interview with Jan Roberts-Dominguez, Julia Child reiterated the value of indexes: "I think a book is only as good as its index. Because if it's not in the index, it's lost."

Her biographer, Noel Riley Fitch, said of her that her appetite for life would never be sated. "In this line of work, you never have to retire," she said to him. "You keep right on until you're through."

As Julia Marshall said on Index-L August 16, "The indexing world has lost a wonderful advocate for the profession."

For those of us who provide our own keyboarding and consider our disability insurance as insurance for our hands and fingers, the following is especially apt, from the forward to volume one of *Mastering the Art of French Cooking*, which she wrote with Louise Bertholle and Simone Beck: "Train yourself to use your hands and figures; they are wonderful instruments. Train yourself also to handle hot foods; this will save time. Keep your knives sharp. … Above all, have a good time."

Julia Child is survived by a sister, Dorothy Cousins, of Mill Valley, Calif., and several nieces and nephews.

2005 ASI/H.W. Wilson Award for Excellence in Indexing Submissions

The ASI/H.W. Wilson Company Award for Excellence in Indexing was established in 1978 to honor excellence in indexing of an English language monograph or other non-serial work published in the United States during the previous calendar year. Its purpose is two-fold: to provide and publicize models of excellence in indexing, and to encourage greater recognition of the importance of quality in book indexing. The award consists of a citation and $1000 for the indexer, and a citation for the publisher.

Books may be submitted by indexers or publishers for consideration for the 2005 ASI/H.W. Wilson Indexing Award between December 1, 2004, and March 1, 2005. The award will be presented at the ASI annual conference in Pasadena, CA, May 12-14, 2005.

Submissions must be received by **March 1, 2005.** The submission fee is $25.00 for ASI members, $35 for nonmembers. Further information about the award, a list of past winners, nomination forms, and submission instructions are available at *www.asindexing.org/site/awards.shtml*.

Send nomination materials to:
Nancy Cisneros, Registrar
Wilson Award Submissions
7518 144th Ave. NE,
Redmond, WA 98052

For more information, please contact Carolyn Weaver, Chair, ASI Wilson Award Committee at *cgweaver@ weaverindexing.com*.

Interview

Interview with Karin Newton, representative of ASI organizational member Matthew Bender

Edited by L. Pilar Wyman

This is the first in a series of interviews with representatives of ASI organizational members. This inaugural interview is with Karin Newton, Index Manager, Matthew Bender & Company, Inc., a member of the LexisNexis Group (Karin.newton@Lexis-Nexis.com, 415-908-3248). Matthew Bender is a long-term member of ASI.

In 1992, Rachel Jo Johnson received the H.W. Wilson Award for Excellence in Indexing for The American Law of Real Property *by Arthur Gaudio, published by Matthew Bender.*

In 1999, Richard Genova received the H.W. Wilson Award for Excellence in Indexing for Brownfields Law and Practice *by Michael B. Gerrard, published by Matthew Bender & Co., Inc. In her praise of Genova's work, Colleen Dunham, chair of the 1999 Wilson Award committee, noted that Genova's index met a three-pronged challenge of (1) bringing readers to the new vocabulary of a new frontier in environmental law, (2) charting an easy map to the large and immensely complicated text of* Brownfields*, and (3) addressing the novice, as well as the sophisticated,* Brownfields *researcher.*

Today, LexisNexis Matthew Bender® is a leading provider of analytical legal research information in print, CD-ROM, and via the Internet. Their authoritative, comprehensive, and accurate legal information covers every major practice area and is authored by leading experts in the legal community.

As many of our subscribers may be unfamiliar with your company, please give us an overview of your organization or your company's core business, and your organization's affiliation with ASI.

I work for **Matthew Bender** which is part of the LexisNexis group, the legal division of the English-Dutch company Reed Elsevier. LexisNexis is a global provider of authoritative legal, news, public records and business information, including tax and regulatory publications in print and online. The online service provides searchable access to four billion documents from 32,000 sources. LexisNexis does business in 100 countries and has 13,000 employees worldwide.

Things weren't this complicated until 1998 when LexisNexis bought Matthew Bender. Before that Matthew Bender was part of the Times Mirror Company, at that time, the owner of the *Los Angeles Times*. During that era, Matthew Bender operated as an autonomous business unit publishing CD's and printed legal treatises and state codes.

Despite this change in ownership, the Matthew Bender indexing group runs pretty much as it did in the past. I manage an indexing team based both in San Francisco, California and Newark, New Jersey. I have a staff of twenty in-house Index Editors and four Index Supervisors. Our group is responsible for the indexing of 1,300 legal treatises and law school books. A separate indexing group in Charlottesville, Virginia, formally the Michie Company, is responsible for indexing Matthew Bender's statutory publications. That group has a staff of twenty-one including an Index Manager, three Index Supervisors, and seventeen in-house Index Editors and Legal Analysts.

Matthew Bender's secondary source indexing group has been a member of ASI for the twenty years that I've been a part of the company, and probably for a few years before that. A couple of us usually attend the local and national conferences where we have given some presentations and had the important opportunity to learn about indexing practices and initiatives at other big companies. The conference presentations have helped us keep up to date on state-of-the-art indexing technology and provided training on building taxonomies, thesauri, and web indexes. Last

but not least, we've met and contracted with new freelance indexers at these conferences.

Tell us about the challenges facing your company that you think indexing can solve.

LexisNexis primarily provides online access to its vast collection of documents through free text searching and assisted searching. The Dayton, Ohio staff responsible for creating and managing the online search tools is made up of an impressive group of engineers, librarians, indexers, and attorneys who have created some remarkable search tools. That group's current big challenge is to provide online search tools that will perform well on a global level. They are currently working on some very exciting projects that will enhance our offerings in our key legal markets in North America, Europe, Africa, the Middle East, Asia Pacific and Latin America.

Meanwhile, Matthew Bender's print publications have been put online and have thus become a part of the vast collection of documents available to LexisNexis customers. In response to the many requests from our customers, we are in the process of moving some of our print indexes online. I believe that it's important for online legal researchers to have access to our print-based indexes because they provide better access to publication information than do either the free text or assisted search functionalities offered by LexisNexis. These print-based indexes are manually crafted by legal indexers who read every chapter page in the publication. As a result, the indexes reference key terms only when there has been a substantive discussion of that key term. The researcher can navigate the print-based indexes via a logical hierarchy of main headings and cross references instead of wading through a long list of search results.

My biggest challenge now is to make sure that the company at large appreciates the

value of these indexes and understands that *lexis.com* needs to continue to put them online. I also need to ensure that the interface and functionality for these indexes is intuitive and user friendly.

I understand you may have a confidential relationship with your organization, but can you paint for us in broad strokes how indexing work gets done there?

Matthew Bender's 1,300 publications vary in size from one volume (typically 1,000 pages) up to publications as large as 159 volumes. Our smallest index is 1 page and our largest index is 2,500 pages. The average size index is 500 pages. Each publication is updated on an as-needed basis, but typically between two and four times a year. Most of our publications are in loose-leaf format which means that the pages fit into three ring binders. The advantage of this format is that whenever a publication is updated we send the subscribers only the pages that have been updated, rather than every page of the book. Of course every time a text page is revised the index must be revised if necessary. Most of our indexing work involves updating existing indexes.

So, how do we get all this indexing done?

Once we have a master publication release schedule for the year, we divide the index releases between all the in-house Index Editors. Of course, due to one manuscript problem or another, the release schedule changes frequently, and so we are always revising Index Editor assignments.

Index Editors try to index as many of their assignments as they can by themselves, but they hire freelance indexers whenever their workload gets to be too much. Quite a few of our freelance indexers are former employees, but we do hire legal indexers with no prior Matthew Bender experience. Typically an in-house Index Editor is working on some aspect of as many as four to five different indexes at once. Index Editors work in CIN-DEX™ and are responsible for parsing and composing the indexes, checking proofs and QCing the CD and online indexes.

How have your indexing procedures changed over the last 5 years?

Our indexing procedures haven't changed a whole lot during the last five years. Probably the biggest change is that we've started indexing some of our publications more lightly than others.

As LexisNexis acquires other legal publishing companies, our indexing group becomes responsible for maintaining the indexes formerly produced by those companies. For the most part these indexes are much simpler than our traditional Bender indexes and so we realized that they should be treated differently. *Dave Ream* (Leverage Technologies, *LevTechInc.com*) helped us develop a semi-automated way to index some of these newly acquired indexes. Essentially, we extract the section headings from the publication TOC and then export them to CINDEX™. An index editor then converts the headings into an index by creating titles, groups, cross references, reversals and other distributions. We are able to complete these indexes in about a quarter of the time it would take us to index

Interview

them in our traditional manner.

Another significant indexing procedural change is that we are now using a file compare tool that allows us to quickly pinpoint what needs to be considered for indexing in a revision release.

As I mentioned, most of the indexing we do is a matter of updating existing indexes. Our authors aren't always as good as they are supposed to be about telling us where they've made changes during a publication update. If we don't know where the changes have been made, we have to re-index entire chapters or complete publications, when in fact the actual changes are often minor and require little re-indexing. For years we tried to find a file compare program that could work for us, but we always ran into trouble when we tried to compare our master SGML previous release files with the updated Word or WordPerfect files submitted by the authors. Several years ago we finally found *NuCompare* (from OpenSource, Inc., *opensourceinc.com*), a file compare program that could compare files with different formats and as a result our in-house productivity is up and are freelance costs are down. [*Editor's Note: This tool was presented at the ASI Conference in Alexandria, VA earlier this year (see also the conference report in the last issue of this bulletin).*]

Within the largest definition of indexing, please tell us about the kinds of people who are doing that kind of work for your company.

The Matthew Bender secondary source indexing staff is made up of people with varying backgrounds. Close to half of them are attorneys and most of the rest have had paralegal training. Lots of them have post graduate degrees, particularly in literature. Like other indexers, they have analytical minds, are articulate, like organizing things, love to read, and are interested in all kinds of things.

What makes a great indexer for your company?

First, the indexer must find legal indexing interesting and then be good at it. I know there are many indexers out there who don't care for legal indexing, but the indexers who work here love reading about the law and learning about changes to the law as they index the publication updates.

Next, they need to be very comfortable using technology, including CINDEX™, Lev-Tech utilities, file management systems, print composition programs and all of the Microsoft desktop products, just to mention some.

They need to be able to handle multiple projects at once.

Like all indexers they need to be able to sit alone and work on a project for hours, but they also need to feel comfortable attending publication meetings and representing their own interests there.

They also need to be comfortable with the fact that procedures and technology are always going to be changing around here.

Finally, they need to be comfortable working on department or company-wide initiatives, such as updating our Best Practices Manual or working on the initiative to convert our products from SGML to XML.

Any new areas of interest? Where do you see indexing taking you and your company?

We still have a way to go to make the interface and functionality of the *online indexes* as good as they can be. We are also struggling to find new ways to make the distilled information contained in our online indexes available in a format different from a typical back of the book index. Those two things alone keep me busy and interested in my job.

Indexing is always going to be important for Matthew Bender print publications and I'm hoping we can make it just as important online.

Anything else you'd like to comment on? Please elaborate.

One big concern I have is that LexisNexis is investigating the feasibility of *offshoring* some of our indexing and editorial work. We are currently working on a pilot project with an offshore company that so far has submitted indexing that doesn't begin to meet the quality of the indexes we create in-house. I am somewhat worried that LexisNexis might find these extremely low cost indexes hard to resist. ⌐⚯

Peer Reviews

Peer Reviewer Guidelines

by Martha Osgood

The following guidelines were originally distributed as a handout at the "Peer Reviews– Doing It Well" session at the ASI Conference in May 2004.

Our purpose as indexers is to make the information in a book available to the readers as efficiently as possible, taking into account various factors such as audience knowledge, the book topic, complexity and needs, and the publisher's requirements. The more we can expand our awareness of how to accomplish that, then the more interesting will be our work, and the stronger our skills, capabilities, and confidence.

All other writings for publication receive a formal proofreading at the hands of the editor, yet the index is supposed to arrive in perfect working order. The intention of the Peer Reviews idea is to become our own proofreaders. An effective peer review process is one of mutual assistance. We do it *with* each other, not *to* each other.

A peer review is a continuation of our own editing process, but with a fresh set of indexer eyes looking at the work. That this review is from an indexing perspective, rather than just an editor's point of view, matters; an indexer will be pickier than an editor.

Uses for Peer Reviews include:

a) Discussing indexing guidelines in the context of a specific index to understand how the needs of different books change how guidelines are followed; *a learning tool*.

b) Critiquing with a fresh eye to bring an index up to professional standards prior to submitting to the publisher; a learning tool and a validation of the quality of the index; *an editing tool*.

Following are some very general guidelines to help a Reviewer focus their attention. The Reviewee might use this list as a starting point in their own ever-changing quality control sheet. Each indexer will surely have other items to add to this list.

The publisher's style guide and even an indexer's personal style will make some of these categories redundant, and the different settings and purposes for a peer review itself may change some of the focus.

1. What is the ***metatopic***? Has the indexer provided this information? Can you see it in the structure of the index? How is the metatopic handled in this index? Could it be handled differently?

2. Who is the ***audience*** for this book, the probable readers? What kind of appropriate language or language adjustments has the indexer used?

3. Is it easy to read the index? Does the indexer use ***keywords*** first? Do the words flow in sentence-like style or do you have to awkwardly back-up and re-read the entry? Is there evidence of *note-taking* vs. indexing? (Note-taking occurs when the indexer is thinking, "If it's there, I should index it," rather than, "If it's there, is it indexable? will the reader thank me? how will the reader look it up?") Point out some entries that work especially well.

4. What are the ***interconnected discussions*** in the book? How is related information gathered? Why did the indexer use one method or another? Has the indexer given the reader more than one route to the information? Find a few double-postings and cross references that work well.

5. Have the more specific ***indexing guidelines*** been followed or is there a good reason to break the rules? Find an example of a rule that has been broken and try to determine if it can be justified. Can we imagine or ask what the publisher's style guide asks for? Can we determine whether there is a tight line limit or length restriction for this index?

6. Are there more than an acceptable number of ***unanalyzed locators*** in an entry? Is this okay in this index?

7. Are ***prepositions and conjunctions*** used only as they are needed for clarity? Are some missing? Can an entry be deliberately misunderstood to show such a need? Are conjunctions structured consistently (either before or after the subentry content)?

8. How are ***similar entries*** structured similarly? Or not? Are all the entries for popes structured similarly? How about chiefs? methods? song titles? etc.

9. Is the ***level of detail*** consistent through the index? Are some entries too vague to stand alone as main entries? Do they rather belong as subentries under other topics or should they be yanked? Are some entries too specific and should be reworded to a slightly higher conceptual level?

10. Point out how ***hierarchies*** are used well or poorly.

11. Have ***widows*** (single subs under main headings) been raised to the main level? Can series of subentries with single locators be reconsidered and where possible combined and rephrased at higher concept levels?

12. Do all main entries begin with ***plural nouns or gerunds***, or sometimes ***noun phrases***?

13. Are correct kinds of ***cross references*** used properly?

14. Is ***mixed-entry structure*** useful to the reader or not? Will the reader understand those ***unanalyzed locators***, which run off from the main entry when there are also subentries?

15. Consider all the other rules and guidelines found in *Mulvany*, *Fetters*, *Wellisch*, the press's style sheet, and now Do Mi Stauber's new book *Facing the Text*. ☞

Peer Reviews

Logistics for Peer Reviews

By Martha Osgood

In addition to giving and receiving feedback on our indexes, one of the benefits of peer reviews is meeting good people in the process. Following are recommendations for how to handle the logistics of peer reviews so that you too can reap the benefits of peer reviews and get to know some of those indexers.

Format

Choose a format for the review: Will attendees review each other's indexes? Will attendees index a small book, an article, a chapter from a book, and then compare and discuss the differences in their indexes? Will an already published index be reviewed by the group? Will there be a combination of these options?

Whatever option chosen, will indexes be distributed by email prior to the gathering, or will it be a "cold review" with indexes first seen at the meeting?

Reviews can be done in red pen, or in Word or WordPerfect with comments in CAPS or in colors.

Other methods of peer review are also possible.

Beginning indexers may request copies of other index reviews as learning tools.

Location

For face-to-face peer reviews, you'll need a location. Peer reviews can happen at tables pushed together in a restaurant or coffee house during slow hours, in a shopping mall/galleria food court, in a room at the library, or at your dining table.

A regular monthly time and place is helpful in encouraging attendance. Consider too arranging a time and room at a regional chapter meeting for cold reviews.

Announcements

An announcement should be sent to potential participants. Participants do not need to be members of ASI. In fact, participation might lead to ASI membership. ASI provides chapters with the names and addresses and email addresses of all ASI members in your area. Consider asking the chapter for that list, and invite those members and other interested people to attend.

Include the date, time and location. Remind folks to bring 4-5 copies of an index for review, or to email an index for review to the convener. A map or directions might be useful.

Invite like-minded indexers. In Eugene, Oregon peer reviews, we send invitations to chapter members via a regional email announcements list indicating these processes. We also forward invitations to others who have mentioned their interest in indexing. (*See* example announcement below.)

Group Size

The discussion in a peer review is key. The discussion is where context, the underlying thinking, the possible solutions, the potential misunderstandings, and the reasons why become more clear.

The size of each small group should be conducive to hearing and participating in the discussion, to taking turns, and for everyone to have a copy of the index being reviewed. Groups of three to five seem to work best, but we've also seen success with ten or more cooperative participants. Participants can also be asked to divide themselves into sets of four or five indexers.

Be sure to have at least two or more experienced indexers in each group so that experienced indexers are reviewed at their level and not burdened with always "giving but not receiving" (*see also* below). More than one reviewer also provides the benefit of multiple perspectives.

While more experienced reviewers will notice more indexing issues to discuss in a reviewed index, peer review groups do not have to include experienced indexers – when

---

Local indexers will hold their monthly peer review on <date> from <time>. We will meet at <location> in the long, narrow room off the main food court. Some of us like to arrive a bit early for general socializing or to stay for lunch for more of the same. During summer months, the A/C is on full blast, so remember your sweater or coat!

Please send indexes for review (if you have one, attached, in RTF (Rich Text Format) to <name> at *<email address>*. At our review we will decide whether or not to split into small groups, depending on how many people attend.

Please respond to <name> with your index **by <earlier date>** so we can distribute the e-mail attachment to all those who will be coming. If you can't send an index in time, bring 4-5 copies to the meeting for a "cold" review, or just come to participate in the reviews.

If you haven't written an index to share, pick a short index from a book you like, make 4-5 copies, and review one copy yourself, heavily, in red pen. Compare your review with the review given at the meeting to see what you knew and how much you learn about indexing standards.

For those new to Peer Reviews, there are some general guidelines for face-to-face peer reviews on the PNW/ASI web site: *www.pnwasi.org/peerguidelines.html.*

If you have any questions, please feel free to ask. — <sig>, <email address>.

An example announcement to go out on a regional email list.

peer reviews began, we were all beginners and still could determine much about the user-friendliness of another's index.

Indexers can also create their own small groups to review for each other.

Procedures

Leaders start with personal introductions all around, and name tags are even more helpful. Describe the process of peer reviews and hand out guidelines to help focus the reviews.

Explain that reviews can be conducted even when reviewers have not read the book indexed. Accuracy of page references is the responsibility of the indexer, but the content of an index as a whole should make sense. The index should have an organization and structure that is useful, quick, targeted to the right audience, sympathetic yet professional. A good reviewer can tell if an index is complete.

Experienced indexers understand that they too can get bogged down in a complex book.

Reviewers with clear eyes can help them regain their balance. New indexers can blow experienced folks out of the water with their insights and pure editing abilities. Take turns and encourage an egalitarian approach instead of a teacher/student relationship.

Reviewers need to consciously point out good examples in the index reviewed, as well as items that need attention. This is in recognition of the courage it takes to present one's imperfect work to one's colleagues. The discussion itself, rather than the idea of "one right method," should be encouraged.

Reviewees may wish to defend some of their indexing decisions by discussing, but reviewees also need to check their egos at the door. The gentle manner of the group will help participants feel more secure, as will the reminder that we would all prefer to hear criticism from a peer than from a publisher or author — or worst of all — from the *New York Times Book Review*.

Peer reviews, whatever form they take, help us hone our skills, deepen relationships, and enjoy the indexing process. ☞

Index or Perish

by Robert A. Saigh

I will write some things you may not like to read, so I am warning you in advance. I am going to address two issues: the ***indexing process*** and the ***decline of the industry***. I know what you are thinking: What does he mean the decline of the industry? Well, bear with me.

First, the ***process***, and then the potential madness. I read the recent indexing magazine issue (Kari Kells, "How do I index thee? Indexers Count the Ways: Part I" (April-June 2004, 54-57) and was amazed how much time these indexers put into their work. I appreciate their dedication to their craft and art, but for some of us, indexing is a job. It pays the bills and allows us to do other things, such as spend time with our families.

My clients pay me by the page. So, whether I spend thirty hours or three hundred hours, they do not care. Why should they? Hit or beat the deadline: that is all they worry about and rightly so. In this frenetic world, the clients are pushing me to finish indices more quickly. If I want to keep them as clients, I have to help them.

To accommodate their schedules, I drill down through the text. First, I index the chapter heads followed by the text heads and any subheads. I start again and index any italicized, hyphenated, or boldfaced terms. Some clients want tables and figures indexed, so I do those. Some clients want author names (in the footnotes, for example) and company names. Whatever customization the client wants, the client gets. My process mimics Ford's automation in that I do discrete passes, which do not overlap.

Oh, and do not forget cross-references. I look at the index from the reader's point of view. No cross-references and I have compromised the index's quality. I have encountered books without cross-references. That's nuts. The only reason for dropping the cross-references is the clients have not given the index

enough room. Their loss, not mine.

Once the project is out the door, I forget about it. I have more projects behind that one, and I must spend time every day answering e-mails and scrounging up new clients. I do not rest on my laurels. But back to the process.

After all this, I attack the text if I have any room left in the index. When the client gives me the indexing job, I ask how many lines are available and I never exceed the limit. I have completed 600-line indices and 6,000-line indices. Most important, once I do a segment of the drill-down procedure, I never go back. After twenty-five years of indexing, I know myself. I do not waste time. No highlighting, no index cards. In and out. Badda-bing, badda-bang.

So you understand, I do take pride in my work, but I am not obsessed with it. (Who knows? Maybe my indices are award-winning material.) Within a week of the project's completion, I have electronically archived the file and have recycled any paperwork. I have not entered my indices in any contest because I do not think about them once I have finished with them (and I have done thousands). And, no, I do not keep page proofs. What for? If clients have to repaginate with more indexing will follow, they will send new pages. The old pages are, therefore, worthless to me.

Lastly, I save the file as an RTF and check the spelling. Whatever mistakes I find, I correct in the index file, so I know the RTF and index file match.

I have given you my process in a nutshell. It would not be a cakewalk for a beginner such as an author who wants to do it by himself or herself. (To those people, I say, "Good luck.") After twenty-five years in the business, I can index in my sleep. I often catch myself doing so, which is scary. I would rather be dreaming about being poolside.

Scary. How about the ***state of the business***? Since 9/11, many of my clients have

Robert A. Saigh has been indexing since the days of DOS and index cards and has been editing fiction and nonfiction even longer. His nonfiction work has covered medicine to veterinary sciences, law to finance, religion to history, and more. He has written two computer books and has two fiction books under consideration for publication.

gone south, lowered their indexing rates, or have outsourced their work. Take each one of these in order.

Companies go south and belly up all the time. I grieve for them for about two seconds and then move on to find another client. I can usually tell when a client is going bye-bye when Net 30 becomes Net 45 (or Net 60) by accident and then consistently. I watch those clients carefully and take fewer jobs. Most of the companies I deal with now are stable and will be around for the foreseeable future.

Clients are lowering their indexing rates. I have taken jobs below my normal rate if the index will be short and I do not have to spend much time on it. As I wrote earlier, indexing is a job. You may argue that if I take lower indexing rates, the client will decrease the rate further. That may be, but what do you suggest I do? What have you done in that situation? I have a family to feed. The family comes first, and I will do whatever I have to do to keep them safe and secure.

As to declining rates and outsourcing, read this excerpt from Robert Reich's *Reason*:

> The Internet has taken over the routine tasks of travel agents, real estate brokers, stockbrokers, and accountants. Meanwhile, back-office work is being shipped out over satellite dishes. With digitization, high-speed data networks, and improved global bandwidth, an Indian office park can seem right next door…. In 2003, companies headquartered in the United States paid workers in India, China, and the Philippines almost $10 bil-

Indexer Work Methods

How do I index thee? Indexers count the ways Part II

By Kari Kells

n the first part of this article (which appeared in the April-June 2004 issue of this bulletin), *Janet Perlman*, *Cathy Martz*, *Sherry Smith*, and I shared our indexing processes with you. In the interest of presenting a varied landscape, a few more indexers here go on-record with their processes.

Cheryl Landes

Cheryl Landes started indexing in 1991. Her topic specialties include computer software, programming and engineering manuals, travel, history, transportation, occupational health and safety, environmental issues, children's books, and cookbooks.

My indexing methods are all over the place, varying project-by-project. Following are some factors that impact my processes.

Embedded indexes

In these cases, I read the text online and insert the entries directly into the files as I go. When I first used embedded indexing tools, I would print out the manuscript, mark it up and then go back to the electronic files to insert my mark-ups. Once I became accustomed to the programs with embedded indexing features, it became easier and faster for me to do everything online.

Subject matter

Some subjects are easier to index than others. Subjects in which I have a background are easier to index than those that I'm not as familiar with. Some publishers will give me subjects I've never indexed before. It's interesting to read the material and learn something new. It's easier for me to mark-up unfamiliar material on paper and then enter the information into an indexing program. If it is familiar and well-written (see next point below), then I'll type in the entries as I'm reading through the text. Otherwise, I'll

mark-up the text first and then type in the information.

Quality of the content

Well-written manuscripts are *much* easier to index than those that aren't. I've noticed over the years that authors who are very good writers also know how to organize their thoughts and material well in a manuscript. When I receive a book that's well-written, I generally read the book and type in the entries as I go, without marking the pages. If the concepts are hard to decipher, then I'll read through the book and mark-up the manuscript before attempting to enter anything on the computer.

Location, location, location

Often I've been working while I'm traveling. If I'm on a plane, I will mark-up whatever manuscript I'm assigned. It's hard to type in entries on a laptop on a plane because of the cramped surroundings, so marking the manuscript gives me a head start until I can settle in a place where there's more room to work. On the train, there's more room to spread out, so I work with the computer there.

Editing

Most of my time is spent editing – the ratio is around 70:30 (70% of the time spent editing; 30% spent analyzing text and creating entries). I will try to edit as much as possible as I go through the text and then have a final pass at the end in MACREX™.

If I'm creating an embedded index, I'll usually create the entries for a chapter or section, compile the index, and edit. I keep doing this until I've reached the end of the document and then do a final edit pass. There are a couple of exceptions to this process because of client requirements. In those cases, I embed the entries; then the publisher compiles the index and gives it back to me to edit.

Kari Kells was a founding member of the Pacific Northwest chapter of ASI, and has served that chapter as Webmistress, Vice-President, President, Newsletter Coordinator, Directory Coordinator and on numerous committees. She has served ASI as one of the original web site co-authors/Webmistresses and on the Web committee. Kells teaches indexing through her business IndexWest, the USDA Graduate School Correspondence Program, and in universities throughout the Pacific Northwest. For more information about her background and indexing services, visit her web site at *www.indexw.com*.

Kathy Sychra

Kathy Sychra has been indexing for three years, primarily in religion and education.

Regardless of the type of book, I follow the same steps. I skim through the entire book and make up a mini-index (metatopics). That helps me stay focused through the marking up stage.

Then I mark up the hard copy. At the end of a chapter, or after marking up 20-30 pages, I do the data entry in SKY Index™. I immediately run a proofing report, and proofread what I have just done. Generating Proofing Reports is one of my favorite SKY Index™ features, although I assume other programs have something similar. I find that the proofing report step insures correct spelling and accurate reference locators as I go along. If there are corrections, I try to make them right away, so I'm finished with that section.

When I'm about a third of the way through a text, I print the index in indented format so I can see how it is shaping up. I make notations and suggestions, but I don't really do any editing. I print another index about two-thirds of the way through, and make more notes.

When all my data entry is complete, and

everything is in the index, I start editing. I first go back over my notes on each of these hard copies and start making the noted changes in my SKY file. Then I deal with all the entries that have questions – how to word an entry, whether a cross-reference is needed, pages I just didn't know what to do with, that sort of thing. Then it's just going through the standard steps of editing an index. Editing is fairly time-consuming and takes about 30-35% of my time for any given project.

Finally I run the SKY function that checks for errors in indexing, then run a spell check (though I try to check spelling very carefully each time I do a proofing report).

I let the finished index sit overnight and give it one more pass the next day, before sending it off.

Seth Maislin

Seth Maislin is an indexing and information architecture instructor and mentor. His biggest success to date has been convincing his mother-in-law that indexing is really, really cool.

When writing a standalone back-of-the-book index, I often receive electronic files, which I print. Now armed with hard copy, a clipboard, and any handy pen or pencil, I start circling ideas that I consider indexable. In many cases I add notes in the margins (or on top of the text itself) that suggest terminology I might consider when writing the entries. After each chapter, or for a short book the entire text, I return through the marked-up pages and begin typing entries into my indexing application. Finally, I review, edit, and improve the index, referring to the text as needed: paging through print versions when reconsidering my choices, or searching electronic versions to resolve vocabulary control issues.

For embedded indexing projects, I rarely print the electronic files. Instead, after a quick review on the screen, I begin the indexing process from the first page. For some clients, I am obligated to return an indexed chapter quickly, often before other chapters are available to me. As I continue indexing, therefore, and I find myself wanting to edit previous chapters, I make several notes to

myself. These notes might be written as an email message that I send myself; other times I access the already-submitted chapters and make corrections using colored text. Eventually, after all chapters have been indexed once, I may have access to a compiled index. I use my notes and the colored text to identify my desired changes and update the final index, before I begin the full editing process. If my client will compile and produce a final index, I will also provide (for additional fees) an incredibly thorough, itemized list of all index edits, ordered either by chapter (if they'll make changes to the index data) or alphabetically (if they'll change only the compiled index).

In both cases, editing usually takes about 40% of the total project time. The reason for this is I prefer to spend time away from the text. That is, I try to be thorough with the hard copy or electronic files so I don't need to continuously refer to them. I find that I can avoid continuously referring to the text if I try to capture every indexable idea up front and worry about organization, alternative access points, and language later. Therefore, I spend the majority of my time working with the compiled index.

Cher Paul

First, there are a few details that color my process. I provide editing services, as well as indexing, so I switch among different processes throughout any given workweek. Because an indexer's eye sees very differently from an editor's eye, I am more methodical as I approach each task. Because I prefer to immerse myself in the material, I prefer to stay with one job for at least several days at a time. On a practical level, pages often flow from the compositor in fits and starts, and I am finished with one set of pages days before the next arrives. In this case, immersion is tossed out the window and I'm just groping for continuity.

To address both these situations – my several work processes and immersion/continuity – I sometimes create a detailed table of contents for projects. I frequently did this when I started indexing and was surprised how often I referred to it. I mostly do it now for projects that flow in fits and starts. I also use yellow stickies to mark chapter openers. I write page numbers in the upper right in a bold color, and highlight in-text name citations (for name indexes) in yellow.

After that, I suspect that my process is like many other indexers' processes. In textbooks (which is mostly what I index), section and chapter headings include indexable terms and concepts, key terms are bolded, and terms are often pulled into marginal notes with their definitions. Those features make indexing terms jump out at me. Because I'm thinking as I'm marking pages, rather than merely in-the-eyes-and-out-the-fingers typing, I'll (a) think of other terms not used in the text, and (b) begin to see whatever structure might underlie the discussion. Of course, I must still weave the structure. The author's skill – or lack thereof – and how much editorial attention the manuscript received will determine how difficult this is.

Weaving

As I mark pages and enter terms, I make notes, draw pictures, question connections between concepts, and compile lists. Illustrations are *very* helpful to me, so I sometimes draw trees, Venn diagrams, or connected bubbles to help fix in my mind connections between concepts. Translating those connections into cross-references is relatively simple, but I don't make the translations until the major editing pass. I edit a little bit as I initially add entries into my software – I may stop every few chapters to clean up little things – but not so much that I lose momentum. For things I must come back to (missing data, for example) I may include "???" or "XXX" in the entry. I remove these as they are resolved, and search for them late in the process to be sure they're all gone.

With ***textbooks,*** I mark several chapters, and then enter my terms into my software. How this moves back and forth varies a lot.

In higher level books, ***scholarly books***, or other books that are more narrative and less broken up with the crutches and cues common for undergraduate readers, I underline and make detailed notes. I will often read the material twice and skim sections as needed. What is written on the pages is pretty close to my initial entry. I mark much more of the text before I enter anything into my software.

After initial entry is complete, I prefer to walk away from a project for a day. If it has been a full-out, total-immersion, overtime experience, I'll probably do something very different on my day off, something physical and brainless that isn't mentally taxing (yard

Indexer Work Methods

work, cleaning the house, hiking). I like to work up a sweat, get winded, and go to bed with a tired body as opposed to a tired mind. Wouldn't that be nice? More often, I take a good long walk, and then work on another project.

I figure on spending about 50% of my time editing; sometimes it's less, but it's never been more. For me, editing begins in earnest with a line-by-line read, during which I add to or amend my notes, pictures, and lists. Somehow, this read is never completed; its purpose seems to be to get me into Edit Mode. Where I start editing varies; often cleaning up small, discrete issues is the place to start, but sometimes it is more helpful to resolve larger structural issues first. Often I Find and Group on a particular term, print the results, decide how to handle the issue, then make the changes. By the time all the items I listed, noted, or drew are finished, I have read the entire index. And I have used every error check mechanism the software provides. With luck, the index has had an external review via a peer review group or IndexPeers; these generally provide a few forehead-slapping moments and elicit much gratitude.

After another break, the final edit is a line-by-line read of the entire index. This is cleanup, and there's not much of it. I'm usually pretty happy by now.

A note on *accuracy*: Typing numbers keeps me very alert because I expect to make mistakes. I use the feature that starts each new entry with the locator of the previous entry, and have trained myself to move my right hand to the number keys whenever my left hand turns the page, then look from page to screen to double-check the new locator. I spot-check every chapter or two. During editing, I am in and out of the manuscript and spot-check locators all the while, as well as checking locators after resolving each question.

Conclusion

Once again, reading summaries of the main steps involved in processes isn't nearly as revealing as seeing details contained in the layers of steps.

Compare the processes described by *Kathy*

Sychra and *Seth Maislin* to see examples of this: Both mark up hard copy of texts, and both work chapter-by-chapter. However, Kathy generates and reviews proofing reports after each chapter, a unique step which none of the other contributors mention.

One huge benefit of looking at a variety of methods employed by indexers is that we have concrete illustrations showing that the logistics of how one goes about indexing isn't nearly as prescriptive as new indexers might first think. Rather, it is how one makes decisions about selecting access points, writing phrases, and creating structures – the creative, subjective processes involved in writing indexes – that is *most* important to the learning process.

Since I began the first part of this article with a selfish note, I'll end with one. I was fascinated by how differently each one of us approaches editing our indexes. Some interesting activities are described by these eight indexers. I'm anxious to try a few of those on for size, to add them to my own editing process to see if any of them feel comfortable to me.

I look forward to hearing and reading about other indexers' processes and getting an even more widespread look at the variety of processes we follow in order to reach our common goal: creating indexes that are useful to as many readers as possible in the target audience for whatever text is in-hand.

Editor's Note: In September 2003, in response to Kari's initial posting about this topic on the indexstudents list (www.indexstudents.com), I summarized my process in comparison with hers and noted that my first step was similar to hers, of which she said, "I browse through the text, reading the table of contents, chapter headings, sections within chapters, and looking at illustrations."

> Ditto! Plus, as I do this – and I believe it's called "**vetting**" – I also mark page ranges for discussions that go over one page (an arrow to show if it's just to the next page, and with the ending page if it's more than that), and I jot down in the margins next to their citations in the text the page numbers of figures, tables, boxes, or other non-text items.

But in comparison to Kari's second step ("I index section headings, inputting them into my indexing software"), my process begins to differ as here I simply **input the index**:

> Not quite – after having browsed and done that preliminary read-through, I then sit down and input the index at the computer. It's amazing how much goes in my head, I guess, when I did that first pass. But by the end of it, hopefully the entire book if it's <500pp (otherwise I take the biggest chunks I can for larger projects), I usually have a good idea of what's going on in the book. Maybe my first reading is a little more detailed than Kari's (it also depends on the type of text and how much attention is required).

That is, I skip her third step, and mush together her second and fourth ("I input the highlighted terms and marginal scribbles into my indexing software"). And **editing**, *Kari's fifth step ("After all the terms are in my software, I edit the index"), is my third step:*

> I do this at the computer. Sometimes I'll stop inputting and revise a section as I get into material more. Either way, I also do at least 1-2 (or 3 or 4 or more) passes after inputting everything. One pass may include spell checking, for example, or verifying cross-references, or working on certain concepts, etc. But there's always one final go-through of the whole sucker, too.

As Kari noted, she then sends the finished index to the client. This too is my last (and fourth) step. In summary, I vet the text, input my index directly from the text, and then edit my index. ⚷

Lick the Needle, Not the Thread: A How-to Guide for How-to Books

by Nan Badgett

'm a junkie, a how-to junkie. That's right. Whenever I want to do anything or go anywhere, I get a stack of books from the library to tell me the best way to get there or how to do it. Of course online research is useful and often more up-to-date, but I still like to sit down in my recliner or on the porch swing or in the bathtub and read a book. That's really no surprise. After all, I produce indexes for printed books: how-to books.

Producing indexes for how-tos may not be as noble as struggling through a scholarly tome, but I can argue that it is more pragmatic. I can work faster on how-tos than on scholarly books, so I can make more money per hour. No author index required! And since how-tos no doubt have larger readership than specialized scholarly books, trade publishers often can pay more.

I index a few scholarly books every year and always find them interesting and challenging. But useful to me, personally? I once indexed a book on theories of teaching mathematics. Fascinating, yes, but I'm not a teacher and I never liked math. On the other hand, I've had many occasions to fix a toilet or unclog a drain, remove a stain or unclutter my desk. My how-to indexing career has provided an incredible wealth of information I can use every day.

For example, my sister the quilter sat struggling to thread a needle. "Lick the needle, not the thread," I suggested. It worked! I hadn't even realized I knew that.

My mother's caregivers thought I was a genius when I removed a broken light bulb from a socket using a potato.

Got candle wax on your tablecloth? I know all the tricks for removing it.

Does your eraser smudge? File it with an emery board.

If you're painting the stairs, paint every other one so you're not stuck at the top or the bottom.

Although my brain is full of how-to tips, I don't choose to use them all. I don't wash my husband's baseball caps in the dishwasher, nor have I wired a house during construction, although I've read many, many times how to do so.

Nonetheless, I live the books I index. While indexing a book on running, I enjoyed a short stint as a trail runner. Since completing a book on birdfeeding, my yard is becoming a bird sanctuary.

Even so, I don't remember *everything* I read. When I need information on how to cook a trout or clean an heirloom quilt, I hope there's a well-indexed how-to that can provide it. Like all how-to readers, I want specific information and I want to find it fast.

Beginning indexers may think how-tos will be great entry-level work. Perhaps, but don't be deluded. I started indexing how-tos because they were the kind of books I knew and loved, and I thought sitting around reading cookbooks and craft books would be fun. It is! But I quickly learned that indexing them can be more challenging than expected, and these challenges can affect index quality.

Nan Badgett, dba Word-a-bil-i-ty, has been indexing how-tos since 1991 after she discovered the indexing profession while researching careers in publishing. She is a past president and secretary of ASI's Arizona Chapter. Her Tucson home is a continual home-improvement project. Floors are next!

hit the highlights. If I have 5 index entries per page of text allowed, I may have to dig to find enough entries. No, this isn't always indexing at its best.

Writing indexes for length sometimes forces compromise. I once submitted an index to an established client and was asked to add about 100 lines. My index was fine, but the book designer had made a mistake and we had to fill another page. The editor and I decided on additional terms for the index, although I admit some of them were fluff.

> **"**My how-to indexing career has provided an incredible wealth of information I can use every day.**"**
>
> — *Nan Badgett*

One of the issues I've struggled with throughout my indexing career, one over which I have little control, is ***index length***. Not all publishers or designers do a good job of figuring index length. I've worked on books with far too little space allowed, as well as a couple with too many lines needed. To create an index within the range of lines requested requires a little planning.

I always ask the publisher for the number of lines allowed for the index. Then I translate that figure into number of entries per page of text. That gives me a good gauge for the depth of indexing. If the publisher has allowed a 3-page index for 300 pages of text, I can only

Even though length restrictions can pose real problems, that's not an excuse for an index with too many ***unanalyzed page references***, which I often see in trade indexes. I believe the indexer must address this problem with careful analysis and creativity.

For example, I own a 350-page consumer medical book with a 3-page index. Maybe not enough room for a quality index, but with careful analysis, it could be greatly improved. When I analyzed the entry below, I found that many of the page references did not provide substantive information and therefore should not have appeared in the index. Differentiat-

The author takes a break from indexing how-to books and practices with the tile saw for her next big project: Floors! (photo by Jerald Harmon)

ing substantive references from passing ones is an integral aspect of good indexing—and the challenge that assures computers won't replace us.

Original entry:

> Carbohydrates, 4, 134, 136, 139, 140, 141, 143, 154, 157, 223, 234, 261, 276, 290–291, 348, 351, 356

Revised entry:

> Carbohydrates
>   cravings for, 156–157, 234
>   defined, 351, 356
>   types of, 140–142
>   dietary intake of, 154–155

In the original index, the carbohydrate entry took four lines, while my revised version takes five. Not to worry. Since the original index is more of a concordance than a true index, I think careful analysis would actually provide more available lines. After all, "cortisol" had thirty-six unanalyzed references! Perhaps editing this entry would have allowed room for "caffeine" or "coffee." Neither appeared in the index, but both were prominent subjects in the text.

Another issue that I believe affects index quality in how-tos is **sub-**

ject-matter expertise. Many trade books don't require experts as indexers, but a lack of subject familiarity may be evident in the index, especially in cross-referencing.

Few might think of sewing as a technical subject, but it is a subject with its own specialized vocabulary. I once saw a sewing index in which the terms "facing" and "interfacing" were confused. It was evident that the indexer wasn't a seamstress.

Especially in a poorly written book, such distinctions may be difficult to make if the indexer doesn't know the subject. The solution? Acknowledge your skills and find your niche. I grew up sewing at my mother's knee, and I've indexed dozens of sewing and quilting books. Construction and home improvement? I'm not an expert, but I've assisted my do-it-yourself husband with laying brick, setting roof trusses, and pouring concrete. I watched as he remodeled our kitchen with granite countertops and a tile backsplash. Last month alone, we replaced a water heater and repaired the underbelly of a mobile home. So I have a clue about several subjects, and I know the terminology. I even enjoy shopping at Home Depot.

Balancing home improvement projects with indexing sometimes compounds the **deadline pressure**, another factor that can affect index quality. Publishing seems to be moving faster all the time. I think most indexers have made mistakes or missed making corrections simply due to the speed at which we must work. But there are a few things an indexer can do to help ease the pressure and assure that enough time is allowed to do a good job.

Although I was reluctant to negotiate deadlines earlier in my career, I've since learned that deadlines are sometimes more flexible than an editor would have you believe. I now have no problem asking for an extra day or two when negotiating a project if I think I'll need it – especially if those extra days fall on a weekend. I would always rather build a cushion into the project and submit it early than to be late. In fact, meeting deadlines has been one of the hallmarks of my success.

Once I receive a project, I set up a work schedule and try to stick to it. I decide how many actual days I will work on the project, considering other work in progress or other life events, then determine how many pages a day I need to index, allowing a reasonable amount of time at the end of the project for editing.

With experience, I've learned that these simple how-to books are sometimes not so simple to index and may require more time than anticipated.

For example, coffee-table books may seem straightforward, but such books sometimes contain volumes of information requiring careful analysis and very subjective decisions. An easy-to-read book on home remedies might require many entries per page, increasing keyboard strokes as well as careful editing to make sure all terms are posted or double-posted as needed. A discussion of RICE treatment for wrist sprain might require the following entries:

> Cold compresses
> Compression
> Elevation
> Ice. *See* Cold compresses
> Rest
> RICE
> Sprains and strains
> Wrist injuries

And that may only cover one paragraph! A book on herbal remedies may require entries for common and scientific names, as well as ailments and symptoms treated. That could add up to five or ten entries for each herb.

Last but not least, publishers sometimes impose style requirements or **specific requests** that don't make for great indexes. Although I may suggest alternatives, I'll please the client in the end if they insist.

I once indexed a zany book on growing tomatoes. The author wanted the entire index to be listed under "tomatoes," an idea that fit the tone of the book. I agreed to do so, but only if we could add a head note: "Of course everything is indexed under Tomatoes. Where else would you expect to find information in a book about tomatoes?"

The editor of another book wanted an entry for "zucchini" in a book about zucchini, with recipes included as subentries. This meant

> **"**Easy-to-read does not necessarily mean easy-to-index.**"**
>
> — *Nan Badgett*

that almost every recipe in the book would fall under "zucchini." I tried to negotiate the point, but in the end couldn't convince the editor.

Issues of index quality really are much the same regardless of book genre. The point to remember is that easy-to-read does not necessarily mean easy-to-index.

But don't be discouraged; the challenge is worth it. Indexing how-tos can enrich your life with things you never knew you needed to know.

Yes, I painted my office green after indexing a book on feng shui, and I've made soap in the microwave.

Perhaps my indexes will help others find the information they need to try a new hobby or pursue their bliss. We never know how far-reaching our work can be. I talked to a friend just this morning who told me, "I thought of you today, as I filed my eraser." ☞

Indexing or Perish *(continued from page 123)*

lion to handle their data entry, billing, customer service, payrolls, insurance claims, taxes, accounts receivable, and even routine software development and computer coding. India already has over a half million workers.[1]

Sobering news, indeed. According to Gartner Research, Business Process Out-sourcing (BPO) revenue has been increasing eleven million dollars every year.[2] Offshore IT Outsourcing states that India is "in a perfect position to enable 24-hour, around-the-clock development."[3] Forrester Research estimates that about 500,000+ jobs are now outsourced and by 2015, about 3.5 million more American white-collar jobs will move from the United States.[4] To low-cost countries, mostly to India, concurs Robert Reich.[5]

One man I corresponded with at Suntec (in India) said he and his associates charge $1 per page proof page for indexing. I cannot compete with that. Now, before you get your software in a twist, realize something important: He, and others like him, has to earn a living, too. He has to feed his family. Life is cheaper there, so the cost of living is less. You cannot blame him or be angry with him. If I were in his shoes, I would do the same. In fact, I wished him well.

E-Business Strategies states,

According to the U.S. Department of Commerce, the value of U.S. exports of legal work, computer programming, telecommunications, banking, engineering, management consulting, and other private services jumped to $131.01 billion in 2003, up $8.42 billion in 2002…. Meta Group predicts that offshore outsourcing will grow by more than 20% annually….[6]

The list continues. What should we index-ers do? Rail against the large publishers, which are doing they have been told to do (cut costs)? Shame them into using US instead of THEM? Form a union even though union membership and clout has been decreasing yearly to its current anemic levels? Move to India? I do not have answers to those questions. I only know I may not be able to keep my day job.

Footnotes:

1. Reich, Robert B. *Reason: Why Liberals Will Win the Battle for America* (New York: Alfred A. Knopf, 2004), p. 126.
2. *See www.dataquest.com/press_gartner/ quickstats/ outsourcing.html.*
3. *See http://offshoreitoutsourcing.com/Pages/ outsourcing_statistics.asp.s.*
4. *See www.forrester.com/my/1,,1-0,FF.html.*
5. Reich, p. 126.
6. *www.ebstrategy.com/Outsourcing/trends/ statistics.htm.* ☞

Members are our Business

Chapter Membership Lists

Up-to-date lists of members are available to chapter representatives at any time from ASI headquarters.
Contact Ruth Gleason at 303-463-2887 or *rgleason@resourcenter.com.*

Your Membership Information

Keep ASI current by logging on to the ASI web site *www.asindexing.org* Members Area to enter your personal changes. Contact the ASI office to change chapter and SIG membership.

Fellow ASI Members

Search by chapter or SIG at the ASI web site *www.asindexing.org* Members Area.

ASI Materials

ASI Brochures

To obtain copies of the ASI Brochures for your chapter or group meeting, indexing courses, or your clients, contact *info@asindexing.org.*

Sample ASI publications

A rotating collection of sample ASI publications (ITI books and issues of *Key Words*) is available for display at chapter meetings, trade show exhibits, etc. If you are interested in using the collection, please contact Marilyn Anderson, Chair of the Publicity Committee: *mjand@verinet.com.*

Embedded Indexing

Indexing in FrameMaker Without Tearing Your Hair Out

by Lucie Haskins

Well, maybe some hair loss isn't avoidable but, with the availability of two plug-ins, emDEX and IXgen, and other techniques, embedded indexing has become much more manageable.

Indexing in FrameMaker has some similarities to indexing back-of-the-book style. I read the pages, I create index entries, and I edit the index.

However, instead of reading hard-copy pages, I read the FrameMaker files that are provided by my clients. I create the index entries by positioning my cursor at the appropriate spot in the FramerMaker file itself and then creating the index entry in the Framemaker marker box.

I follow this process until I have added all the index markers into the files. I then generate the index and edit/massage the index into its final shape. This is a very painstaking and tedious process.

Some of FrameMaker's embedded indexing shortcomings

FrameMaker functionality for indexing is very rudimentary and doesn't provide the features that reduce input and/or editing time and effort. Shortcomings include:

- tiny marker box size and tiny font size
- minimal marker box functionality
- no index preview
- no entry autocompletion
- no change propagation
- no temporary grouping

As you can see, FrameMaker does not provide much of the functionality that indexers expect with their dedicated indexing software. FrameMaker seems to have the mindset that once an index entry is created, it is in its final form and no further manipulation is needed for it.

In the following sections I have provided an overview of where I use emDEX and IXgen (and sometimes other techniques) to work around the shortcomings mentioned above.

IXgen and emDEX functionality

IXgen and emDEX are third-party plug-ins for FrameMaker that work independently of each other. (*See* the Additional Information section for links to these products' web sites.)

IXgen and emDEX do not provide all the functionality available with dedicated indexing software, but they are a lot better than trying to index with FrameMaker alone. Time is money and any time saved is worth the relatively small purchase price for these two plug-ins.

Once installed, these plug-in functions are accessed via drop-down lists off the FrameMaker main toolbar. I can use one or both plug-ins at the same time. The plug-ins complement each other. I use both, for different purposes and at different times.

Figure 1: IXgen and emDEX as they appear on the FrameMaker main toolbar after installation.

Marker box size

I have found that emDEX (especially the current 2.0 version) is most suitable for helping with my data entry needs. The ability to enlarge the marker box and, more importantly, the text in the marker box is invaluable. I can actually see what I am typing because I can enlarge the font size to whatever my eyesight requires.

Lucie Haskins became a freelance indexer in 2000 after a long career in the computer industry. She is the current chair of the Colorado Area Chapter and a member of the ASI Webmaster team. For more information on embedding indexing, visit her web site, especially the Resources page: *www.asicolorado.org/members/lhaskins*.

Working late at night was horrible before this functionality was available. In figures 2 and 3, below, notice the side-by-side comparison of the marker box sizes and font sizes. The emDEX marker box and font size can be enlarged even further if necessary.
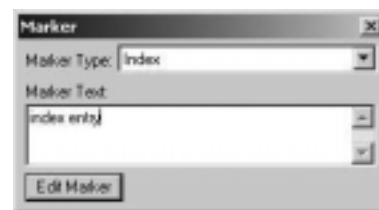

Figure 2. The FrameMaker marker box.

Figure 3. The emDex marker box.

Marker box functionality

The emDEX marker box (figure 3) contains a **delete button** to delete existing markers. I did not think I was going to use this feature extensively but have found it to be quite a timesaver when doing my final editing passes and when I need to get rid of markers quickly. Deleting markers the "old" way had been more cumbersome than I had realized.

When italics or bold formats need to be applied in FrameMaker, special codes have to be manually entered around the affected text. When the index entry is part of a page range, start range and end range codes need to be manually inserted into the marker box. Cross references require special coding also. FrameMaker provides no functionality to reduce the tedium of inserting these style codes manually.

However, emDEX 2.0 provides **customizable radio buttons** within its marker box. I can have long strings for <Emphasis>, <Default Para Font>, <$startrange>, <$endrange>, <$nopage>, and so on (up to 10 strings) predefined and available to insert in my marker box with the click of a button or shortcut key.

This feature was exceptionally helpful this past year with one client who used so many different style codes that I had to include codes in just about every marker box. Imagine what that would have been like without emDEX's capability!

Figure 4. emDEX provides the ability to customize up to ten radio buttons in the emDEX marker box. (See figure 3 to view the radio buttons defined here.)

Index preview

In FrameMaker, I cannot see the index as it is being built. When I create an index entry, I do so through the index marker box (figure 1 or 3). Once the index entry is created, it is written (embedded) in the FrameMaker file and disappears from the marker box. If I want to see how that entry looks in the index, I have to take a separate step and generate the index.

Because I cannot see the index, I often do not remember the exact wording or spelling of previous index entries, and I often forget how I constructed them. Then, I end up using slightly different phrasing or wording for subsequent index entries. These slight variations build up, and then require cleanup at the editing stage. This is a major drawback.

However, emDEX provides a special window to show the index as it is being built (figure 5). If I invoke the option to automatically update the emDEX window as I enter index entries, I can see my index as I am building it. It is wonderful to have visual verification of what is going on!

There is a caveat on using this feature: The larger the index file, the slower this process works. To get around this problem, once I have indexed several chapters and am relatively comfortable with my term selection, I often do not bother to use this feature at the book level. However, I do use it extensively at the chapter or file level, where I can see all

Figure 5. The emDEX window that shows an index as it is being built.

the entries I have created for a specific chapter or file, and where the index size does not get large enough to cause performance problems.

I have found that I also do quite a bit of editing from this window during the input process. The window provides a "jump" capability from the "selected" index entry to the actual index marker in the FrameMaker file. Editing as I go saves on editing time down the road.

Viewing index entries right in the document text

IXgen takes a different approach to making the index entries "visible."

With IXgen, I can view (and edit) markers right in the document text through the "expand markers" and "collapse markers" functions (*see* figure 6, next page).

This feature is especially helpful when checking a section of the file to review what I have already done in that section.

Entry autocompletion

FrameMaker treats every index entry that I create independently of any other index entry. That is, FrameMaker does not provide auto-complete suggestions for the entries I type into the marker box. I either have to remember what I typed previously or generate the index to see the previous entry.

Unfortunately, no magic bullet exists with either IXgen or emDEX to help in this area. The best solution that I've come up with to-date is to be as vigilant as possible when entering information. I use the emDEX window for previewing.

I also rely on online post-it notes (*see* Additional Information) to copy and paste terms that I think might bear watching. Because I have a dual-monitor setup (figure 7), I "paste" my post-it notes all over my ancillary screen (where they are always visible) while I index in my main screen.

When I need that term again, I simply copy it from the post-it note and paste it inside the marker box. It really saves on typing for large or difficult-to-spell words. (Caveat from sad experience: do *not* place an online post-it note inside a FrameMaker file. It will corrupt the file and the file, once closed, will not be editable.)

Figure 6. The IXgen expand markers feature at work.

Old version:

```
InfoPath
    defined   215
    Excel and   225-227
    generating HTML output   261-263
    linking forms   230-236, 245-247
    populating controls   236-239
    scripts and   243-245, 247-255
    sharing data   227-230
```

New version:

```
InfoPath (Microsoft)
    defined   215
    Excel and   225-227
    generating HTML output   261-263
    linking forms   230-236, 245-247
    populating controls   236-239
    scripts and   243-245, 247-255
    sharing data   227-230
```

Change propagation

FrameMaker allows you to edit only one index marker at a time. Any changes made to one index marker do not propagate (or cascade) to the related markers. For example, if I need to edit the main heading of a group of records for the InfoPath example above right, only the record I update will reflect the changes. Other related records will still need to be updated individually. Because some of the records in this example also contain page ranges, each portion of the page range would need to be updated individually.

In other words, this example would require seventeen separate edits. Each page locator identifies a separate record.

While emDEX and IXgen do not propagate changes, they do provide the much needed ability to view multiple markers at one time. This is the next best thing to having changes cascade down the impacted records.

Especially helpful is IXgen's Editable Marker List (figure 8), which provides a view of all markers at the book level or selected markers at the file level. Markers are copied into an IXgen table where I can edit multiple entries one at a time (but regarded by IXgen as one overall task). When I finish editing the IXgen table, I then apply the changes.
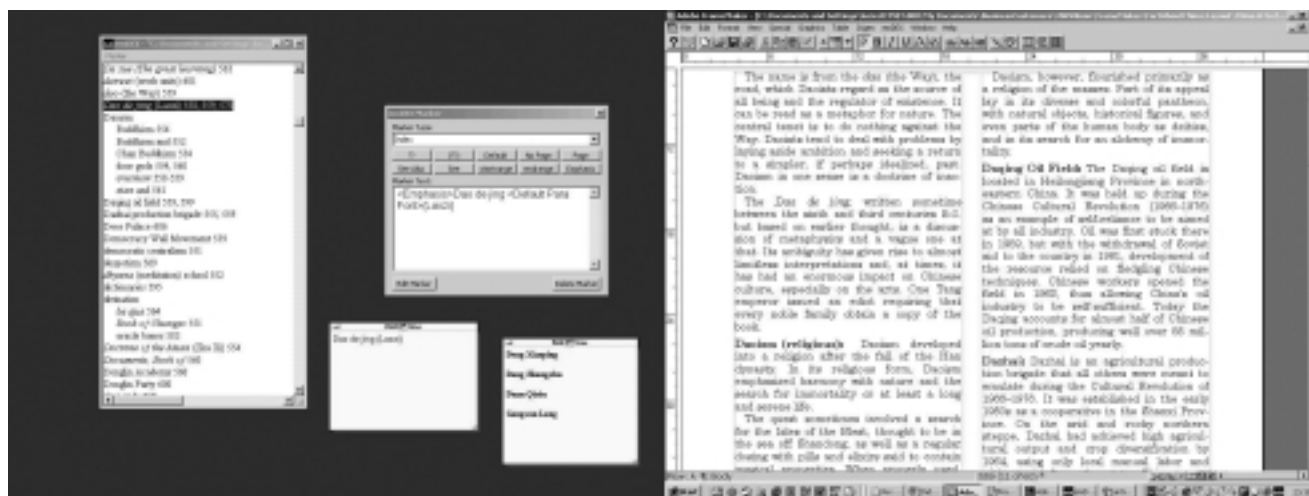

Figure 7. The author's dual-monitor setup, with post-it notes, emDEX window, and emDEX marker box on an ancillary screen and a FrameMaker file open in the main monitor.

IXgen, behind the scenes, updates the affected index markers in the FrameMaker files.

I use this feature heavily during my final editing pass.

Figure 8. IXgen's Editable Marker List, that allows editing more than one index entry at a time.

Temporary grouping

FrameMaker provides no ability to temporarily group index entries. Unfortunately, neither do emDEX nor IXgen. The next-best thing is using FrameMaker's Find/Change function (figure 9) within IXgen's Editable Marker List.

I invoke Find/Replace searches as many times as necessary to find similar concepts.

Figure 9. The FrameMaker Find/Change box.

Conclusion

You can imagine how time-consuming indexing in FrameMaker can be. Therefore, any time that I can save anywhere in the process, helps in the long run. And, while helpful, emDEX and IXgen do not make up for all of FrameMaker's embedded indexing shortcomings.

Even with these labor-saving devices, embedding index markers in FrameMaker typically takes at least 50% longer than producing equivalent back-of-the-book indexes.

I have gotten speedier in my work efforts, from 5 pages an hour in 2000 to over 11 pages an hour this year. I am convinced that this increase in speed and efficiency is due to my use of emDEX and IXgen. I could not imagine doing an embedding indexing project without them.

Additional Information

Software tools

emDEX: *www.emdex.ca/*
FrameMaker: *www.adobe.com/products/framemaker/main.html*
IXgen: *www.fsatools.com/*
Online post-it notes:
www.3m.com/market/office/postit/com_prod/psnotes/download_lite.html

Resources

Barrett, Anne C., "IXgen: Tips, Tricks and Totally Cool Techniques," available at *www.stc.org/48thConf/postconf/anne_barrett.pdf*.

Haskins, Lucie, "IXgen Demonstration," ASI National Conference, Galveston, May 2002, available at *www.asicolorado.org/members/lhaskins/resources.htm*.

Mauer, Peg, "Embedded Indexing in FrameMaker," *KeyWords*, The Newsletter of the American Society of Indexers, September/October 1998: 1, 6-8. Also available at *www.stc.org/ConfProceed/1999/PDFs/STC-4.pdf*. ⌖

Why Embedded Indexes Are Different, Not Better

by Dave Prout

Dave Prout, a freelance indexer for many years, currently lives in Chapel Hill, NC. He can be reached at *ddprout@yahoo.com*.

I recently completed my first embedded index and wanted to share the experience in Key Words and see if, after catching a glimpse of the brave new world of on-line, on-demand publishing, other indexers feel that the future may not include them either. Obviously, one embedded index an expert does not make, but the purpose of this article is to stimulate discussion about some of the assumptions that go into preparing both embedded and traditional indexes.

Although I was glad to have the learning opportunity, I find myself hard-pressed to say it was a positive experience, and in this my reaction seems to be decidedly mainstream. In a much-cited article, Nancy Mulvany (1994) reports that 95% of her respondents were not satisfied with embedded indexing programs. Although this informal survey did not try to imitate more rigorous studies like the Kinsey reports, many will suspect that the other 5% were probably lying.

After ten years, embedding programs have yet to make a leap in usability or friendliness, and a majority of book indexers still seem to prefer stand-alone software. Despite the same concerns about the difficulties of editing embedded indexes that have been raised from the beginning, publishers are simply turning a deaf ear and appear intent on using embedded indexes for more of their projects. Why?

The good news is that the software is not completely automated yet and cannot replace the wetware (i.e., humans), *for those in the know.* The italicized phrase is an important qualifier because the ability to explain and appreciate what makes one index more useful than another is being lost even among publishing professionals.

That presses are turning out more product faster and cheaper is great, I think. It is as senseless to pine for the small editorially driven companies of yore as it is to mourn the replacement of family farms by agribusi-ness. Although I lack hard data, many publishers seem to be deliberately narrowing their editorial involvement in order to streamline production as much as possible. Like other corporations, they have jumped aboard what George Ritzer (1996) calls "the McDonaldization of society:" a reliance on automation, quantity rather than quality, and efficient but cheap workers. Consequently, inquiring indexers need to know: ***Will embedded indexes become the norm, and do they suffer from poorer quality?***

Encounters of a Technical Kind

My saga begins with a European university press — let's call it the Most Venerable Press (MVP) to avoid pointing fingers — which claims to be doing all of their scholarly books with embedded indexes (2,500/year). In an effort to simplify the particulars, I have conflated my interactions with the project manager and the computer technician who wrote the indexing instructions into a single character called Randy.

Figuring out what was needed was not that difficult, even though Randy's chirpy instructions had almost driven the first-time author, who had originally planned to do the index, to despair. A printout of the unedited manuscript's XML (extensible mark-up language) file was provided. I would use stand-alone software (CINDEX™) as usual but, in addition, I would mark the hardcopy with start and stop anchor tags. Then presumably some well-educated but underappreciated serf (perhaps in Hyderabad, India?) would later add the tags to the XML file, so as to automatically convert the index locators into final page numbers.

While I have never been comfortable around numbers, I immediately noticed that Randy might be even worse off in this regard. Her recommendation was either to use ran-dom numbers (my index would have 2,100 locators) or to use a "more sophisticated" four-part system of chapter, page, line, and entry number (e.g., "0912.1902" for chapter 9, page 12, 2nd entry on line 19). Pointing out the obvious, I was able to suggest a two-part numbering system, just the page and a sequential entry number, which seemed to work just as well.

As for the text anchors, I would have to mark the printout by hand for each index entry with, for example, for my third entry on page 40, "40.3b" at the beginning of the discussion as the start tag and then "40.3f" on page 43 where the discussion finished three pages later for the stop tag. Nothing could be easier, of course, were indexing only a linear process that identified key terms in the text which have definite start and stop points, but more on this later.

What immediately raised a red flag, however, was that the sample Randy provided had all the tell-tale faults of an index prepared by fully automated software, of what we in the South refer to as the tragic result but unavoidable risk of marrying a cousin. Of the fifteen entries and two cross-references (one of which referred to another subentry under the same main heading), twelve were simply authors cited in the text. The other three (e.g., "judgment") were vague enough to be useless. In other words, her sample did indeed look like an index but was not a very good one, *for those in the know.*

Needless to say, I was glad to point all this out. But Randy brushed away my criticisms by cheerfully admitting that she did not actually have any indexing experience. The idea, she thought, was nonetheless sound, and besides,

the Society of Indexers agreed with her. I could be sure that a prestigious publisher like MVP would not have adopted such a plan without thoroughly thinking things through.

A Different Tack

Well, we U.S. indexers are nothing if not meticulous and tenacious (and cranky?), so I tried another gambit. I conceded that many types of books (scientific, technical, medical) are good candidates for embedded indexes, especially those planned for frequent revisions, repackaging, or spinoffs. However, other books (particularly those in the humanities, such as the literary analysis I was working on) often pose more complex challenges that are best handled by traditional indexing methods.

This split of scientific and humanistic literature reflects how western culture has become polarized into opposing tribes of intellectuals: those who have scientific training and the humanists who do not. Not surprisingly, neither group is adept at communicating with the other because they use different cognitive languages, as C. P. Snow (1998) pointed out in his famous 1959 lecture, "The Two Cultures and the Scientific Revolution." Although both camps have many similarities, scientists rely predominantly on objective data while humanists are much more comfortable with subjectivity (although each specialty uses a mixture of both).

With this insight, I proposed to Randy that there are different types of index entries: objective facts and subjective concepts. For example, an index I did recently for Henry Giroux (2004) argued that the First Amendment protects civil rights, but the USA PATRIOT Act undermines them. My factual entries included "civil rights," a cross-reference at PATRIOT Act but the main heading under USA, and "Constitution, First Amendment of," all of which could be easily tagged in the text. Giroux then went on to say that neoliberalism is not unlike terrorism, but the terms had several overlapping meanings: Neoliberalism is often interchangeable with free trade, open markets, and laissez-faire economics, but sometimes different. Terrorism might refer in one place to authoritarianism or cutbacks in welfare programs and in another to militarization or social Darwinism. Thus, deciding which conceptual entries to use is itself often notoriously subjective, doubly so because few authors systematically

define or are rigorously consistent when using interrelated terms and synonyms.

Factual entries rarely pose a problem for wetware or software, regardless of the subject matter, because they are easy to identify and can be clearly delineated within a couple lines or pages in the text. Conceptual entries for a scientific book are usually pretty straightforward as well. (Maybe because the genre encourages clear definitions and syllogisms?) However, literary works often rely on a highly metaphorical or theoretical discussion with many nuances and qualifications. The index may have more conceptual than factual entries, which may not correspond to specific words on the page, and numerous digressions or interruptions may make it hard to determine exactly where a discussion starts and stops. (Perhaps this is one reason cultural studies books in particular often have either an unusually bad index or none at all?)

And it gets trickier. As things progress, an indexer is always comparing other entries culled from different parts of the text. Scientific books tend to rely on professional jargon, which acts like a controlled vocabulary, but the conceptual entries from a literary study are typically much more expansive, ambiguous, and polysemic — and deliberately so. Consequently, more time is needed for the final edit when a great deal of reshuffling typically occurs along with combining individual pages, merging similar entries, and rearranging or eliminating subentries.

Such changes cannot be predicted but are enormously complicated by having to readjust the original tags in the text.

Alas, Randy remained unconvinced that any of this posed a problem per se, and I realized it probably came down to our different upbringings: I was still stubbornly holding on to some analogue notions better suited to print media, while Randy had gone completely digital. Bottom line: All I needed to know was that MVP was going to do indexes this way from now on and that the Society of Indexers had signed off on it.

Old Dog, New Tricks

Let me share a couple tricks that made the indexing go a little easier:

- Of course, since the goal is to minimize rearranging the anchors as much as possible, you cannot *overprepare* by thoroughly reading the text beforehand and making as many (tentative) decisions

about the main headings as possible. However, no matter how much preparation you do, the better the index, the more time is spent editing it.

- Even though all the locators are supposed to reflect only the start page, it is well worth the extra key strokes to *include the stop page* in order to change the anchors in the text later, if necessary. Since I was using CINDEX™, I also entered the stop page by using braces and angle brackets. In the example above, the locator would be just 40.3 in the formatted view, but the draft view would show "40.3{<43>}."

- Similarly, I found it helpful to *hide definitions and related terms* within brackets for more difficult conceptual entries. In the example above, let's say I am not sure yet if the main heading should be at free trade or neoliberalism, so I would flag the problematic terms: "neoliberalism{ or free trade?}" and vice versa. This allows me to do a search for question marks at any given time and to assess how the flagged concepts are shaping up with regard to (my best guess of) the author's preferred terminology.

- Even some factual entries benefit from *hidden notes and reminders*. This is one way of keeping track of stylistic preferences, and should more than one subentry on the same page suggest itself, rather than deciding which one is best too soon, the other can be included within braces, which gives more flexibility during the final edit.

- Don't disbelieve those who warn that *embedded indexes take twice as long* (e.g., Wyman 2002). Although the learning curve was faster than expected, marking and juggling those darn anchors certainly gobbled up time. The author raised my quoted fee by 20%, which helped but by no means compensated for the actual time expended.

Finally, just because you do not agree with a set of instructions does not mean it will not work. In the end, I surprised myself by being basically satisfied with the index, but I still felt I could have done an even better job without embedding.

What, Me Worried?

Embedded indexes are here to stay (the scheduling and economic advantages to pub-

Embedded Indexing

lishers are just too attractive), and indexers like me who are hung up about doing a good job will need to find another line of work. Since it is obviously possible to prepare an embedded index for a literary book, why do I resist? The question is easier to ask than answer, but bear with me as I ponder a couple ramifications.

Many things benefit from a Fordist approach (the classic example is a pin factory). But is indexing still more of a handicraft? A principal lesson from the digital as well as industrial revolution is that the technology always defines what is considered acceptable quality, which is often poorer than the artisanal standard it replaces. Although Randy listened patiently to me, it was as if she already knew that for MVP's system to work it had to be dummied down even more. Nuance and quality issues would only complicate things and cost more than what they wanted to pay.

However, our main concern should be the growing communication gap between indexers and publishers, authors, and readers. I do not mean to imply that ASI has failed in its educational mission, but heaven knows there is no lack of work that still needs to be done. We should be able to explain what we do so everyone understands how we add value to a book. Clients do not see us working hard for a couple weeks or struggling with terminology; they see a list that a computer might just as well have generated and are disconcerted about the fee.

Perhaps we are used to doing unappreciated work because indexes are, to use a wonderful phrase by Kevin Jackson (1999), an "invisible form." Many consider indexes an inessential part of the book because the author did not write it (or wrote it as an afterthought). Few nonindexers come away from skimming our work full of admiration and praise. An index is either useful to them because it had an entry for the term they thought of, or not.

Although more research would be helpful, entry selection and the writing and reading of lists are not nearly as transparent or straightforward as MVP would like to believe (*see*, e.g., O'Banion 1992). The only glimmer of hope I see is the obvious one: authors, who

---

❝Our main concern should be the growing communication gap between indexers and publishers, authors, and readers.**❞**

— Dave Prout

---

are usually busy being a professor and who thought their job was done when they handed in the manuscript, are not always going to welcome the opportunity to stay up late and try to become an indexer.

I realize there may be readers of a computational ilk who would argue that many of the problems I have described here can be avoided by relying on information architecture and taxonomies. But humanistic books do not always use words that can be unambiguously defined and ranked hierarchically. Literary language is different because many terms have a subjective and interrelational, but not an objective, definition.

As Randy made all too clear, whoever controls the definition controls the argument. We have let production managers and computer technicians decide what an index is and should be. Our only choice now is to help them make what they want to do work even better. At the risk of sounding like a nostalgic humanist handicapped by an outmoded liberal arts education, let's remember that when the first indexes appeared in the fifteenth century, the invention was hailed as being as important to the advancement of learning "as the map [was] to geographical voyages of discovery" in that they "opened up non-linear modes of reading and thus of conceptual organization" (Jackson 1999, 295–96). To survive, we need to figure out how to do that again, but this time for e-books and Web sites.

Let's hope that every indexer of MVP books will want to go to the "extra" trouble of doing a thorough edit. But as embedded indexes become the norm, as they are no doubt fated to be, who will want to pay for the extra time needed to do a good job? Few will miss the concepts because indexes will naturally be

---

full of facts.

By embracing embedded indexes, are we hastening our own obsolescence?

Epilogue

After writing the above, I contacted the nice folks at the Society of Indexers for some background on what I had been led to believe was their active and continuing support of the MVP program. It turned out that although Randy didn't blatantly lie to me, she neglected to tell the whole truth and nothing but.

I learned, for example, that many of their indexers feel the system is being imposed with little regard to how it affects the quality of their work. MVP's rationale supposedly sprang from the desire to make things easier for authors who do their own indexes. Special free software has now been developed, and if Randy has had anything to do with it, the indexes will probably resemble her dreadful sample.

By the way, since entries are made from the unedited manuscript, the copyeditor is mainly responsible for formatting the index and resolving any inconsistencies and errors.

At least no one can accuse MVP of being behind the times. I was recently offered a copyediting job at a low rate by a U.S. university press, but to sweeten the deal, they would throw in an extra fifty cents per page if I supplied the "barest and most essential" of indexes at the same time.

References

Giroux, Henry A. 2004. *The terror of neoliberalism*. Boulder, CO: Paradigm Publishers.

Jackson, Kevin. 1999. *Invisible forms: A guide to literary curiosities*. London: Macmillan, 1999.

Mulvany, Nancy. 1994. "Embedded indexing software: Users speak out," *www.bayside-indexing.com/embed.htm* accessed July 17, 2004.

O'Banion, John D. 1992. *Reorienting rhetoric: The dialectic of list and story*. University Park, PA: Pennsylvania State University Press.

Ritzer, George. 1996. *The McDonaldization of society: An investigation into the changing character of contemporary social life*, rev. ed. Thousand Oaks, CA: Pine Forge Press.

Snow, C. P. 1998. *The two cultures*. Introduction by Stefan Collini. Cambridge: Cambridge University Press.

Indexing a Classic: Thoreau's fully annotated *Walden,* 2004

By Randall Conrad

L ike him or not, most Americans know a thing or two about Henry David Thoreau. "The man in the street knows that Thoreau went to Walden Pond to live and went to jail," his biographer wrote, "but has a vague notion that he spent one half of his life doing the one and the other half the other."[1] In real time, the American philosopher and naturalist spent exactly two years, two months and two days (1845-1847) living in relative solitude at Walden Pond on the outskirts of his native Concord, Massachusetts. In between two of those 794 days, Thoreau spent only one night, albeit a historic one, in jail rather than pay taxes which he said supported slavery and unjust war.

Not surprisingly, the sesquicentennial of Thoreau's masterwork this year is still ushering in a tide of Thoreau studies and a wave of "anniversary *Waldens*" aimed at diverse readerships. For those who know *Walden* well, the ultimate version is the massive "fully annotated" edition newly available from Yale University Press.[2] The editor, Jeffrey S. Cramer, is curator of collections at the world's most concentrated collection of Thoreau studies, the Henley Library of the Thoreau Institute, 8,000 books and a wide archive that includes the correspondence and files of generations of scholars, preserved in a state-of-the-art, climate-controlled library in Walden Woods.

By late spring of this year, Cramer's editorial labors were finally in press at Yale, under the guidance of manuscript editor Phillip King. To index the 400-page work, Cramer sought someone experienced with *Walden* and Thoreau studies. So when the author of these lines – freelance editor, indexer, Thoreau scholar and Thoreau Institute habitué – received an e-mail inquiring about availability to do the back-of-the-book index for the mother of all *Waldens*, you could have

measured the response time in nanoseconds.

That is the short part of the story. It took me rather longer to visualize what a 21st-century index to this idiosyncratic 19th-century text needed to be, and to arrive at an efficient solution after a few false starts. I would discover, as if for the first time, what it might mean to index a classic.

Scope of Work

The index, it was agreed, must cover Cramer's extensive explanatory notes (laid out in the margins of the page, concurrently with the text) on a par with the text itself, as distinct from the customary practice of selective entries using a differentiating device such as "241n." Users of this authoritative version, already familiar with Thoreau's work, would want the benefit of thoroughly searching the highly detailed editorial apparatus.[3]

In the end, I was allowed 3,200 lines (double the length originally envisioned) and extra time.

All you indexers reading this, pause with me a moment to give thanks for the Olympian patience of editors – the serene tolerance, at any rate, of the two gentlemen associated with the Yale *Walden*.

And please remain seated as I tell you that, in a spirit of Thoreauvian simplification, I used only index cards and pencils to accomplish the entire task.

I mean, don't they actually *recommend* this bracing exercise in Indexing 101?

By adding a pound or two of graphite powder and wood shavings to the world's waste stream, I was, in my way, celebrating the sesquicentennial.[4] The old-fashioned labor did bring me closer to Thoreau's text, and to the spirit in which he worked. Maybe even closer materially, considering that Thoreau and his father were innovative pencil manufacturers, the originators of today's Number Two and its kin.[5]

Randall Conrad, a writer, editor and indexer in Lexington, Mass., has contributed literary, historical and cultural criticism to *The Concord Saunterer, Thoreau Society Bulletin, Film Quarterly, Cineaste* and other journals. He recently edited *Henry David Thoreau: Cycles and Psyche* by Michael Sperber, M.D. (2004) for Higganum Hill Books.

pencil and graphite business, Thoreaus', 20, 42, 67, 68, 251
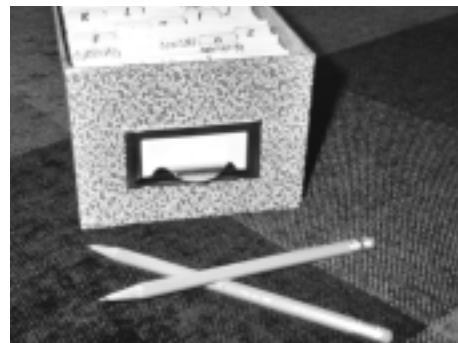
The author used index cards and Number Two pencils as he celebrated the sesquicentennial of Thoreau's Walden.

Genesis of a Classic

Thoreau's sojourn in Walden Woods bore literary fruit, notably of course *Walden,* that wry essay in individualist philosophy and social comment, but also a great deal of other work. True enough, Thoreau had withdrawn to the local woodlots to be close to nature and meditate, but his burning preoccupation was to get a lot of important *writing* done. Day after day during those 26 months, Thoreau sat at the green wooden table he had brought from home, consuming pens, pencils, ink and paper over what he called "some private business."
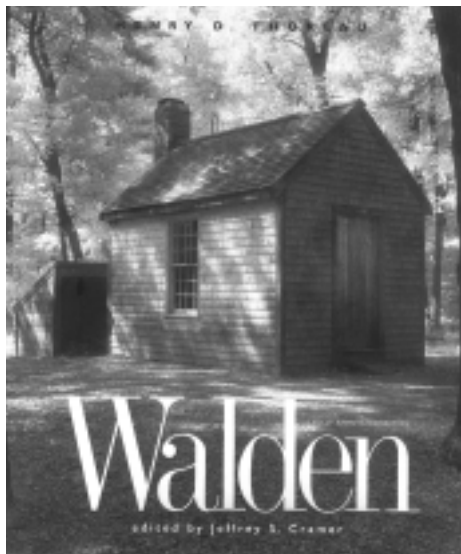
He wrote and revised his first book, *A Week on the Concord and Merrimack Rivers*, kept up a voluminous daily journal that was now in its eighth year, wrote his impressions of a trip to Maine and a bold climb up Katahdin, wrote several essays, conceived "Civil Disobedience," and composed the first draft of *Walden* itself, (as he said, "the bulk of these pages").

Years after the pond sojourn, that original draft had grown twice as long and infinitely deeper. For years off and on, living in the village, rarely traveling, and visiting Walden nearly every day for hours, Thoreau brought his manuscript through a succession of painstaking revisions. Having hit upon the idea of organizing the narrative around the cycle of a single year's seasons, Thoreau rearranged passages, added new material, and enhanced every page with poetic quotation, wordplay, jokes, fables, parables, allusions to history and myth, and references drawn from his wide reading in literature, philosophy, science, travel, and religious scripture.

Seven drafts later, *Walden* finally appeared in August of 1854. It was the second and last book-length work Thoreau would publish in his lifetime, and a classic of world literature, never out of print since its author's death. (He died at 44 from tuberculosis, incurable in those days.)

He made Walden Pond, "earth's eye," the centerpiece of *Walden*, and the play of images on that lake's mirroring surface aptly symbolizes Thoreau's shifting uses of reality as a writer — one source of the book's enduring fascination and, I dare add, its resistance to taxonomic practices.

> art: multi-layered for sense, truth, and beauty, 2, 315-16

Symbolic Realism

Part autobiography, part jeremiad, part invocation and divination, *Walden* is not your ordinary work of nonfiction, awaiting an ordinary index. Not as long as Thoreau held to his goal: "I would so state facts that they shall be significant, shall be myths or mythologies." As a writer, Thoreau sought to guide us to a world of higher truths, and used realities as the signposts: "All perception of truth is the detection of an analogy."

> analogy, 13; basis of Thoreau's art, xxiii

It follows from Thoreau's analogic tendency throughout *Walden* that, just when you believe he's been describing everyday realities, some trick of style may hint that *this may have been about something else at the same time*. Realities in *Walden* play hide-and-seek, just like the waterfowl that teases Thoreau one afternoon on Walden Pond in a famous passage as real as it is symbolic.

> loon: Thoreau chases a, 224-26; wild laughter of, 224, 226

There's the rub for the indexer. When is Thoreau's reference real, and when is it oblique, jocular, an idle throwaway? True, some throwaways are obvious enough, and we learned to spurn them in Indexing 101. For example, in recommending inward exploration over globetrotting, Thoreau advises, "It is not worth the while to go round the world to count the cats in Zanzibar." Neither of *Walden*'s two previous indexers fell for that one, and neither did I.[6] So you will have no "Zanzibar, cats in"; no "Zanzibar" at all.

Some instances, though, are more challenging. What should the indexer do about the question Thoreau asks in a passage on the spread of education, using place names to stand for universities? "Shall the world be confined to one Paris or one Oxford forever?" Of my two predecessors, one omitted them as if they were more Zanzibars; the other, however, specified: "Oxford University (England)" and "Paris, University of." I mimicked option two.

Being and Nothingness

Besides consulting *Walden*'s previous indexes for precedents, I used this touchstone: if even a casual item is explained in an editorial note, it becomes substantial enough to merit an entry. This proved helpful in the case of such Thoreauvian devices as the mock sermon, the knowing wink, and the tongue-in-cheek litany. For example, on the topic of fuel as a necessary of life, Thoreau wrote:

> It is now many years that men have resorted to the forest for fuel and the materials of the arts: the New Englander and the New Hollander, the Parisian and the Celt, the farmer and Robinhood, Goody Blake and Harry Gill.

Besides inspiring a straightforward main entry with cross-references ("wood, enduring value of, 241. *See also* fuel; fire; trees"), Thoreau's sentence had prompted editorial annotations identifying his facetious literary references, and your indexer accordingly produced these additional entries:

> "Goody Blake and Harry Gill" (Wordsworth), 241[7]

> Robinhood, 241

As to that New Hollander (native Australian), he does enjoy a more substantive presence (in another chapter) which I duly indexed. But in this fuel passage, I considered him and his fellows as generic as New Zanzibarians, and denied them entry.

Hard Realities

Thoreau's variable-density realities had disturbed *Walden*'s first indexer to some extent, as I judged from occasional entries at the back of the Princeton Edition that had an undertone of existentialist resignation:

> Nebuchadnezzar, name not on bricks, 241

> Reality, 98; not appearance, 95

Yet substantives in *Walden* are not all evanescent. More than his peers, Thoreau portrayed some of the hard social realities in the surrounding culture of antebellum Concord and America.

During his years at the pond, famine in the British Isles began to drive waves of Irish immigrants to New England shores, and Thoreau devoted dispassionate, sometimes unfriendly, pages to the new laborers whom he saw "living in sties" with their families along the new railroad their labor had built.

He observed the displaced Penobscot and Wampanoag selling their wares from door to door ("Indian(s), native American [...]; "strolling" (itinerant) in Concord, 20; basket-seller, 20") and he reflected on industrial degradation in Massachusetts's new textile mills: "the principal object is, not that mankind may be well and honestly clad, but, unquestionably, that corporations may be enriched."

Above all, Thoreau inveighed against slavery. One branch of the underground railroad, the slaves' clandestine northward route, passed through Concord, where Thoreau and his abolitionist family concealed and assisted fugitives on the road to freedom. He pointedly refers in *Walden* to one of the runaways "whom I helped to forward to the northstar" ("...helps runaway slave, 147"). In the chapter "Former Inhabitants," Thoreau offers poignant vignettes of men and women of color who lived marginal existences in Walden Woods in earlier times.

Rethinking *Walden*

A modern index, I felt, would have to accommodate this documentary side of *Walden* no less than its art.

For this to happen, moreover, a good index needed rethinking in terms of contemporary cultural sensitivities, of Thoreau's modern status as a founder of ecology, and of current scholarship around Thoreau's spiritual life, metaphysics, ideas about art, and more.

A modern index also would offer entries dedicated to *Walden*'s most famous passages. Previous indexers had been content to list Thoreau's eighteen chapter titles, yet modern scholars also think in terms of *Walden*'s set-pieces in their own right, such as the loon on the lake, the battle of the ants, the thawing "sand foliage," and the several original stories, parables, and fables woven into the narrative.

Earlier indexers had gotten along using loose categories, obsolete nomenclature ("Irish," "Irishman," "Irishmen" in one index, occupying separate lines, imagine!), and hit-or-miss subentries (under "Indians" for example, "Mucclase, 168; Puri, 112," but no "Penobscot").

And so I became systematic, creating more uniform entries such as the following (numerals omitted):

> African Americans and Africans, __; *see also* anti-slavery; slaves and slavery; Underground Railroad in Concord; and *particular names*
>
> Indian(s), native American, __; "strolling" (itinerant) in Concord; basket-seller; tents of; house-building of; Algonquin; Mucclasse (Muklasa); Penobscot; Wampanoag
> Irish immigrants in Concord, __; railroad workers; menial laborers; shanties and unhealthy conditions of. *see also particular names*
>
> New Hollander (native Australian)
>
> Puri (native Brazilians), expressions of time

Saving Closet Space

Religious references needed to be organized in the same spirit. Thoreau, who worshipped at an altar of his own devising, was as familiar with many sacred writings of Asia as he was with the King James Bible (perhaps more so, he claimed). As a result, he seasoned *Walden* with the wisdom of the Vedas and, to a lesser extent, Confucian parable. Unfortunately, prior indexes allowed only haphazard access to these enriching perspectives. So I provided this at-a-glance entry (numerals omitted):

> Asian belief systems
> CONFUCIAN: *Analects*; *Doctrine of the Mean*; *Great Learning*; Mencius; Thseng-tseu
> HINDU: *Vedas*; Brahma and Brahminism; *Bhagavad-Gita*; *Harivansa*; Menu (Manu); "Laws of Menu" (by Thoreau); *Vishnu Purana*; *Sankhya Karika*; *Hitopadesa*
> ZOROASTRIAN: Zoroaster; *Zendavestas*; let the farm-hand commune with Z

Yes, I confess, I was feeling unWellisch when I provided these classifications among my entries. But I meant well, and I tried to compensate. I replicated those sub-entries as main entries too, sometimes slightly expanded ("Sankhya Karika of Iswara Krishna, 94"). And I made entries for related material: "Kieou-pe-yu, sends messenger to Khoung-tseu (Confucian parable), 93."[8]

Once I had tasted the fruit of classification, I realized that this was like installing space-saver units in the bedroom closet. The entries "trees" and "plants," with a couple of dozen subentries apiece, saved me over 25% in precious lineage, while "birds" (statistically the most frequent natural reference in *Walden*) freed up some 33% of the space that the individual species would have occupied if each were a main entry – and you can still find your "loon" on his own, with his own subentries.

Nor was this all

Besides fauna, flora, natural history, and multiple cultures, *Walden* teems with double entendres, literary references, historical and classical allusions, and names, names, names ("Theseus, 28, 37, 77; Thessaly, 219, 281;" etc.) The classically educated Thoreau, who brought only Homer with him to Walden, freely alludes to the great books the reader is presumed to know, often intending parody.

> Trojan War, … used in anti-war description, 219-20

In this last example, I was quite aware of departing from tradition by indulging the term "used in." I saw that the indexer would have to take a step back sometimes, and treat Thoreau's art and style as subject matter in their own right. *I saw…* but wait!

Suddenly, everything that was bothering me – the generic New Hollander, the "not appearance" of reality, the puns, the endless parade of spear-carriers from Homer, Hesiod, and Virgil – swirled together in a single epiphany. Suddenly (but past my original deadline), the taxonomic spirits vouchsafed me a vision: *I saw that I would fit everything, absolutely everything, into those 2,300 lines.*

My predecessors, bless them, had indexed *Walden* for the general reader, but *I would be wrong to follow their model.* After all, this edition's specialized users know perfectly well that *Walden* teems with puns, parables, paro-

dies, set-pieces, autobiography, and literary devices. As indexer, I simply had to include these elements as so much material. (I was abetted, of course, by the initial mandate to index the notes on a par with the text.)

Like the sorcerer's apprentice, I summoned the genii of classification to my aid. Did I hear the editor hoping that every last classical reference would fit in the index? Very well, problem solved. If I lined them all up as subentries within two main entries ("ancient authors and authorities — references" and "classical myth and legend — allusions and references"), everybody from Aeschylus to Zeus himself was guaranteed a seat. I didn't have to worry whether the allusion was substantive or trivial, and I gained a whopping 50% in saved lineage. And I could spare more lines to assure individual entries for Homer and his translators Chapman and Pope, Achilles and his friend Patroclus, Hercules ("…labors trifling compared with Concordians', 2-3"), and others with substantive claims.

In a similar spirit, it occurred to me, why not attempt to index some of those puns? They are part of Thoreau's poetics, adding new dimensions to the text. A couple of instances would turn up in routine subentries, for example, "Christianity, traditional..., as 'improved method of *agri*-culture,' 36." (The italics and hyphen are Thoreau's. Get it? "agree-culture.") One problem, though: How to be selective? *Walden* is so loaded with verbal play that more puns are being excavated with each passing year.[9] Problem solved! I just used my rule of thumb: if it got a note, it got indexed. My space-saving entry "puns and wordplay — annotated" compressed 41 word-jokes into a mere 17 lines. Those 41 puns, out of Thoreau's many hundreds, had prompted editorial explication, and so deserved induction.

Walden is part autobiography, and the customary entries used in biographies were put to use. I created three for Henry, spanning 80 lines with a certain succinctness. Besides the obligatory "THOREAU, HENRY DAVID, Other Works," I wanted an entry that would accommodate the book's autobiographical aspects. Within "THOREAU, HENRY DAVID, Self-portrayal in *Walden*," I managed to encompass Thoreau's self-depictions (both acts and ideas) in a

more or less chronological string of subentries ("…meditates, 108-10; helps runaway slave, 147; values chastity, decries sensuality, 212-14…").[10]

Next, your intrepid indexer undertook "Thoreau, Henry David, Themes in *Walden*," and fashioned a rather pleasing daisy-chain using only 14 subheads: "alertness and waking," "books and classics," "growth and maturation," "higher laws and spiritual life," "living in nature," "morning," "present moment," "rebirth and renewal," "simplicity," "solitude and society," "spring," "time and eternity," "truth," and "wildness."

With my T's shipshape, could the equally populous W's be far behind?

In the company of "Walden house, Thoreau's," "Walden Pond," "Walden sojourn, Thoreau's," and "Walden Woods," I enjoyed assembling the self-referential "*Walden* (the book)." This entry was truly the place to revel in the indexing of a classic, and, in the last four subheads, the place to include Thoreau's most famous parables and tales: "…art of, (*see also* analogy); writing of; audience for; lecture version of (1847); publication of (1854); as heroic book; reading; universality of; parable of basket-seller; lost hound, horse, and dove; artist of Kouroo; strong and beautiful bug."

The Walden Experience

Working in a public library reading room amid the surprisingly audible voices of librarians and the ebb and flow of patrons, poring over *Walden*, word by word, pencil in hand, alert (I hoped) to new associations, I came to believe that indexing *this* classic was a privileged experience. It made me a silent, solitary reader of scripture; it showed me my own reflection even as I peered beyond it, looking deep into waters I scarcely knew.

But the clock had not stopped. By the time I reached *Walden*'s penultimate pages, tragically behind all deadline, I was ready to believe Thoreau was mocking me with his concluding parable, "the artist of Kouroo":

> When the finishing stroke was put to his work, it suddenly expanded before the eyes of the astonished artist into the fairest of all the creations of Brahma. He had made a new system…, a world

with full and fair proportions; in which, though the old cities and dynasties had passed away, fairer and more glorious ones had taken their places. And now he saw by the heap of shavings still fresh at his feet, that, for him and his work, the former lapse of time had been an illusion, and that no more time had elapsed than is required for a single scintillation from the brain of Brahma to fall on and inflame the tinder of a mortal brain.

When I put the finishing stroke to my index, behold, it was exactly 2,300 lines, and I had built a new system with full and fair proportions. So it seemed in my overheated brain, at any rate. Whether the lapse of time involved had been an illusion, only my serene and patient editors may say.

Such was one indexer's life in the woods. Have I told you any new techniques, ideas, or tips in the above tale? Probably not; my grand adventure merely allowed me to rediscover solutions as ancient as taxonomy itself, though each one, as I hit upon it, seemed as fresh and original as the light that dawns over Marblehead, north of Boston.
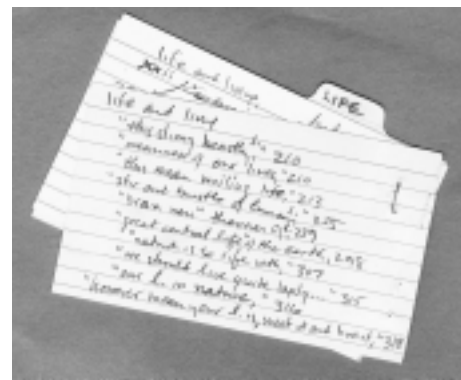
The author's index cards for "life and living".

Time will tell if the index to Yale's anniversary *Walden* will aid seekers as I hope it will. In the latest *Thoreau Society Bulletin*, which came out after the index was finished, a researcher asks if anyone has a lead on "the possibility that Bill Wheeler [an alcoholic cripple in Thoreau's Concord] may at one time have lived in a hollow tree."[11] Maybe my sixth sense told me to include the entry, "trees, hollow, dwellers in, 302, 321," although I can already predict it won't answer

New Products

Atlas™ Ergonomic Book & Copy Holders, Dainoff Designs, Inc.

At the 2004 ASI Annual Meeting in Alexandria, VA, I was delighted to see a new addition to the exhibit area: Atlas™ Ergonomic Book & Copy Holders. I consider my Atlas™ Standard copyholder to be one of the three absolutely essential items for running my business, right after my computer and the ultra-comfortable desk chair where I spend 90% of my working time.
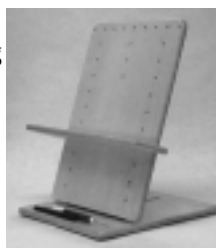
I started my indexing business in 1991 and spent the next 10 years or so looking for the perfect copy holder, one that was sturdy, adjustable, could handle 3-ring binders comfortably, and that wouldn't take up too much valuable real estate on my desk. I tried half the products on the market, from folding plastic stands to freestanding metal contraptions. Nothing worked quite right. Then in 2003, a message on Index-L recommended checking out the Atlas holders made by Dainoff Designs, Inc. I went Web browsing and was sold. I'm now the satisfied user of a copyholder that handles fully-loaded 4" 3-ring binders, bound volumes, loose pages, single issues of journals, and my personal checkbook (for entering records into Quicken) with equal ease.

Atlas™ Standard ($99)

Atlas™ Ultra ($65)

Atlas™ LC ($92)

> I bought the Atlas bookholder from you last summer, and I continue to profit from it. Really can't imagine how I managed before! It goes from my desktop to my laptop work environment. I even set it up on the coffee table when I'm couch-potatoing on the sofa!
>
> It's perfect for a monthly journal indexing job. I love being able to raise and lower the shelf.
>
> — *Sharon H. Sweeney, Ph.D.*
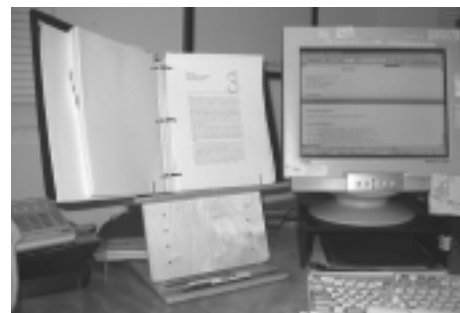
Atlas™ Standard copy holder loaded for indexing.

Events

—February 17-21, Washington, DC: **American Academy for the Advancement of Science (AAAS) Annual Meeting**. *www.aaas.org*.

—April 13-17, Tucson, AZ: **19th Annual Association of Independent Information Professionals (AIIP) Conference**. *www.aiip.org*.

—April 21-23, **Hollywood, CA: American Copy Editors Society (ACES) 2005 Conference,** *www.copydesk.org/conference.htm*.

—May 8-11, Seattle WA: **Society for Technical Communication (STC) 52nd Annual Conference "Experiencing Technical Communication**." *www.stc.org*.

—May 12-14, Pasadena, CA: **American Society of Indexers (ASI) Annual Conference "I is for Indexing."** *www.asindexing.org*.

—May 20-24, Atlanta, GA: **Council of Science Editors Annual Meeting**. *www.councilscienceeditors.org*.

—May 26-30, New York, NY: **International Communication Association (ICA) 55th Annual Conference "Communication: Questioning the Dialogue."** *www.icahdq.org*

—June 1-3, Boston, MA: **Society for Scholarly Publishing (SSP) 27th Annual Meeting**. *www.sspnet.org*.

—June 27-July 1, Montreal, Quebec, Canada: **Usability Professionals Association (UPA) "UPA 2005: Bridging Cultures" conference**. *www.upassoc.org*.

—July 6-8, Barcelona, Spain: **7th ISKO-Spain Conference "The Human Dimension of Knowledge Organization."** *http://bd.ub.es/isko2005/en/*.

—July 10-13, Limerick, Ireland: **Institute of Electrical and Electronics Engineers Professional Communication Society (IEEE PCS) 2005 International Professional Communication Conference.** *www.ieeepcs.org*.

Wyman, L. Pilar. 2002. "Why you don't want to index e-books" (review of Stephen Sottong's presentation at the ASI Annual Conference). *Key Words* 10 (4): 101.

Acknowledgments

With a footprint of only 11" x 11", the sturdy wooden stand has a weight capacity of over 25 pounds and a 14" x 3" shelf that can easily extend with supports on each end to accommodate 4" binders. The shelf can be positioned at virtually any height, and the back angle is adjustable between 15 and 60 degrees. There are metal page stoppers to restrain bound volumes, a spring-loaded clip that readily holds journal issues (and my check register!) in place, and a reversible line guide that is very useful when type starts to blur at 2 am while on deadline. And it's stable enough that even a cat using it as a launching pad can't turn it over.

Atlas™ holders come in three different models. Most share the Standard features noted above. *Standard* is the most versatile, with the widest angle adjustments, spring-loaded clip, and reversible line guide as standard features. The *Ultra* is more portable and has only two angle adjustments. The *LC*, designed for use by library catalogers, is extremely heavy-duty and has a wider shelf and back, with less angle adjustability. Page stoppers are standard with all models. (Although the page stoppers are easy to lose, free replacements can be requested by phone.) The spring-loaded clip is optional on the *LC*, and the line guide is an option for both the *Ultra* and *LC*. Set-up, using the enclosed directions, is a breeze.

Quantity discounts range from 5% for 3-5 units to 20% for more than 25 units.

For further information, visit the Atlas Web page at *www.bookandcopyholders.com* or call 800-GET ATLAS (800-438-2852).

— *Submitted by Carolyn Weaver, Weaver Indexing Service* ⌐⊙

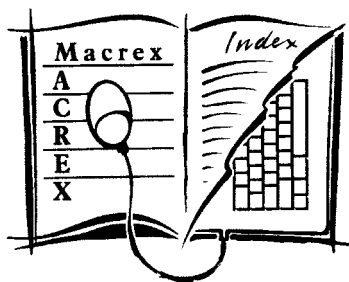the question. As the indexer of a classic, you will never know when one author's symbol is another one's reality.

Notes

1. Walter Harding, *The Days of Henry Thoreau* [1965], Princeton Univ. Press, 1993, xii.

2. Henry D. Thoreau, *Walden*, A Fully Annotated Edition by Jeffrey S. Cramer, Yale Univ. Press, 2004.

3. This marginal "running endnote" layout was also used by Philip Van Doren Stern in his *Annotated* Walden... *Together with "Civil Disobedience,"* New York, Clarkson N. Potter, 1970, and by Walter Harding, ed., *Walden: An Annotated Edition*, Boston, Houghton Mifflin, 1995.

4. Besides using pencils, cards, and a battery-run pencil sharpener, I did perform the list-building on a Macintosh PowerBook, but only using MS Word.

5. On Thoreau's place in manufacturing history, *see* Henry Petroski, *The Pencil: A History of Design and Circumstance*, Knopf, 1999, ch. 8.

6. *Walden* has had two prior indexes. Paul O. Williams provided the first, for the authoritative "Princeton Edition" of Thoreau's complete works (*Walden*, ed. J. Lyndon Shanley, Princeton Univ. Press, 1971). Indexers please note: Williams received *an indexing credit in the TOC*, which is

still there in the 2004 paperback reissue. The second index was compiled around the same time by Philip Van Doren Stern for his annotated edition (note 3).

7. With a flip to *Wordsworth, William*. (In the poem, Harry refuses to give Goody firewood.)

8. Fortunately, I knew I had Linda Fetters on my side: "I think it is preferable to make classified entries rather than leaving the reader guessing whether he or she has found all the relevant information that might otherwise be scattered throughout the index." (Linda K. Fetters, *Handbook of Indexing Techniques*, 2nd ed., Corpus Christi: Fimco, 1999, 31.)

9. *See*, for instance, Randall Conrad, "...Results of the First Annual Thoreau Pun Survey," *Thoreau Society Bulletin* 231 (spring 2000), 6-7; and Michael West, *Transcendental Wordplay: America's Romantic Punsters and the Search for the Language of Nature*, Athens: Ohio Univ. Press, 2000, esp. ch. 6, 12, 13, 14.

10. I chose "self-portrayal" over "autobiography" because the degree and authenticity of the latter concept in *Walden* are flashpoints of current scholarly debate.

11. Yes, Thoreau specialists worry about such things. "Notes and Queries," *Thoreau Society Bulletin* 247 (spring 2004), 12. ⌐⊙

American Society of Indexers
10200 West 44th Avenue, Suite 304
Wheat Ridge, CO 80033-2840