# The Indexing Life

## Australian and New Zealand Society of Indexers Conference

## 15–17 March 2007
## Melbourne, Vic

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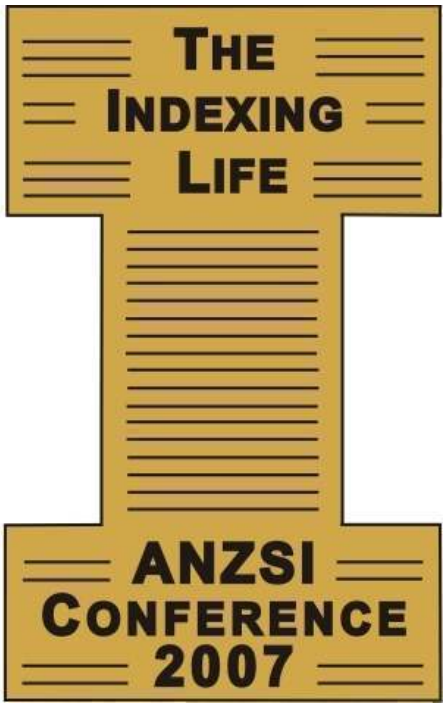
# *The Indexing Life*

Proceedings from the Australian and New Zealand Society of Indexers Conference

Thursday March 15 – Saturday March 17, 2007
Melbourne, Victoria, Australia




Edited by Mary Russell

Australian and New Zealand Society of Indexers

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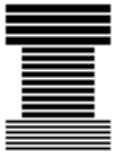

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# Preface

**Karen Gillen**
**ANZSI Victorian Branch President**

The Australian and New Zealand Society of Indexers (ANZSI) 2007 Conference – *The Indexing Life* – was held 15–17 March at the Amora Hotel, Richmond, Victoria. The Victorian Branch of ANZSI hosted the conference, and was pleased to welcome delegates from across Australia, Fiji, Hong Kong, Iran, Britain and the United States. Of the seventy-seven delegates who attended, thirty-eight were self-employed or freelance indexers, and the thirty-nine worked full- or part-time in organizations.

The theme of the conference – *The Indexing Life* – reflected the intentions of the conference organizers to put together a program that would reflect as many aspects of 'the indexing life' as possible; provide professional development opportunities for those just starting out in the profession through to those with well-established careers; and cater for database and web indexers and back-of-book indexers. In keeping with these ambitious aims, the conference provided delegates with a varied program of targeted workshops, presentations of conference papers on an array of subjects, 'birds of a feather' sessions, and panel discussions on a range of topics. The program also included a comic reading and a health and well-being session designed for sedentary workers. Delegates were also able to socialize and network at a range of enjoyable formal and informal social activities.

Among the highlights of the full and diverse program were the fact-filled and thought-provoking keynote addresses by Geraldine Beare (representative of the UK Society of Indexers) and Prof. Pam Peters (Dictionary Research Centre, Macquarie University). These presentations were delightfully complemented by Sharon Gray's comic reading of an article by Richard Boston, published in *The Guardian* (16 April 1989), on how the 20 volume Oxford English Dictionary (OED) came into being.

The conference also featured a display of ANZSI Medal-Awarded Books, along with a list of past Medal winners and those whose work had been highly commended. This is the first time that these books have been collected and displayed together. Conference delegates also had the opportunity to attend the official launch of *The Indexing Companion* by Glenda Browne and Jon Jermey (Cambridge University Press 2007).

The overall success of the 2007 ANZSI Conference could not have been achieved without the unflagging efforts of the Conference Convenor, Margaret Findlay, and Conference Committee members Max McMaster, Jenny Restarick, Mary Russell and Karen Gillen. In addition, the Conference Committee was ably assisted by other members of the ANZSI Victorian Branch Committee: Alan Eddy, Jane Purton, John Simkin, Kathy Simpson and Catherine Tully.

# *The Indexing Life*

# Conference Program

## Thursday, 15th March 2007

### Full day Workshop

| | |
|---|---|
| 9.00am – 4.00pm | **Newspaper/Magazine Indexing** *Max McMaster* |

### Morning Workshops

| | |
|---|---|
| 9.00am – 12.00 | **Cindex Software** *Frances Lennie* |
| 9.00am – 12.00 | **Law Indexing** *Alan Walker* |

### Afternoon Workshops

| | |
|---|---|
| 1.00pm – 4.00pm | **Web Indexing** *Glenda Browne & Jon Jermey* |
| 1.00pm – 4.00pm | **Indexing Annual Reports** *Michael Harrington* |

## Friday, 16th March 2007

| | |
|---|---|
| 8.30am – 9.00am | **Registration and coffee** |
| All day | **Trade Exhibition** |
| All day | **Honour Board of Medal Awarded Books** |
| 9.00am – 10.00am | **Opening:** *Karen Gillen,* ANZSI President |
| | **Keynote address (1)** Indexing Past and Present. *Geraldine Beare* |
| 10.00am – 10.30am | **Morning tea** |

| | | |
|---|---|---|
| 10.30am – 11.30am | | **Concurrent Sessions** |
| | **A.** | Database and Web Indexing 'Birds of a Feather' Session. *Prue Deacon* |
| | **B.** | Back of Book Indexing 'Birds of a Feather' Session. *Max McMaster* |
| 11.30 – 12.30pm | | **Concurrent Sessions** |
| | **A.** | Panel Discussion – Indexing Gardening/Botany publications. *Caroline Colton; Alex George; Roger Spencer* |
| | **B.** | Behind the scenes in publishing in nineteenth- and early twentieth-century Australia. *Wallace Kirsop* |
| 12.30pm | | **Lunch** |
| 1.30pm – 2.30pm | | **Concurrent Sessions** |
| | **A.** | Compiling a bibliography in the digital age. *Geraldine Triffitt* |
| | | Compiling and indexing a bibliography of theatre programmes. *Dennis Bryans* |
| | **B.** | The VOCED database – from indexing to dissemination. *Jeanne MacKenzie* |
| | | Learning architecture: issues in indexing Australian education. in a Web 2.0 world. *Pru Mitchell* |
| 2.30pm – 3.00pm | | **Book Launch**: Pam Peters launch of *The Indexing Companion* by G. Browne & J. Jermey (CUP 2007). |
| 3.00pm – 3.30pm | | **Afternoon Tea** |
| 3.30pm – 5.00pm | | **Concurrent Sessions** |
| | **A.** | Data Metallogenica. *Kerry O'Sullivan* |
| | | Indexers do the darnedest things. J*ennifer Gawne & Kathy Simpson* |
| | **B.** | Indexers' Roadshow. *Michael Harrington; Max McMaster; Michael Ramsden; John Simkin; Alan Walker* |
| 5.00pm | | **Meeting of ANZSI Council** |
| 7.00pm | | **Conference Dinner** |

## Saturday, 17th March 2007

| | | |
|---|---|---|
| 8.30am | | **Registration and coffee** |
| All day | | **Trade Exhibition** |
| All day | | **Honour Board of Medal Awarded Books** |
| 9.00am – 10.00am | | 'New look' Society-wide Mentoring Scheme. *Lynn Farkas* |
| 10.00am – 10.30am | | **Morning tea** |
| 10.30am – 11.30am | | Keynote Address (2) Language on the move. *Pam Peters* |
| 11.30am – 11.45am | | Oxford English Dictionary. *Sharon Gray* |
| 11.45am – 12.30pm | | Health and Wellbeing Session. J*enny Davrain* |
| 12.30pm – 1.30pm | | **Lunch** |
| 1.30pm – 3.00pm | | **Concurrent Sessions** |
| | **A.** | The database in your future. *Jon Jermey*<br>Maxus: A demonstration of database and thesaurus management software products in the construction of a database index. *Andrew Pentecost*<br>A study on the feasibility of subject authority control of web-based Persian Medical Databases: an Iranian experience. *Saeed Rezaei Sharifabadi* |
| | **B.** | Seminar: Business basics for freelance indexers: what to do before and after you hang up your shingle. *Renée Otmar* |
| 3.00pm – 3.30pm | | **Afternoon Tea** |
| 3.30pm – 4.30pm | | **Concurrent Sessions** |
| | **A.** | Indexing manuscripts and the Koorie Indexing Name Project. *Shauna Hicks & Simon Flagg*<br>Managing language; some reflections on corporate glossaries. *Sherrey Quinn* |
| | **B.** | Panel discussion – Indexing cooking/food publications. *Caroline Colton; Isabelle de Solier; Tricia Waters; Tim White* |
| 4.30pm – 4.55pm | | Consensus-based indexing: group development of indexing principles. *Glenda Browne* |
| 4.55pm – 5.00pm | | **Closing Session** *Karen Gillen*, ANZSI President |

# Contributors

## Geraldine Beare, *Freelance Indexer, UK*

Geraldine Beare is a freelance indexer who indexes everything from solar physics to biography; art to accounting. She has held a number of positions on the Council of the Society of Indexers including vice-chairman, programme organiser and newsletter editor. Apart from indexing, Geraldine also gives day courses on social history and is about to lecture on board ship - in May.

## Glenda Browne, *Freelance Indexer, NSW*

Glenda Browne has been a freelance indexer of books, journals, online help, databases and websites since 1988. She also teaches indexing and related topics for a number of organisations. With Jon Jermey she has written the books *Website Indexing* (Auslib Press, 2nd ed. 2004, www.webindexing.biz) and *The Indexing Companion* (CUP 2007), which is being [or has been] launched at this conference. Glenda is President of ANZSI NSW Branch and writes the 'From the literature' section of the *ANZSI Newsletter*.

## Dennis Bryans, *Melbourne*

Dennis Bryans was born at Ballarat. After a State School education he studied fine art at the Ballarat School of Mines, Camberwell School of Art, London, and RMIT. A change in career path in 1974, after 10 years in Television, to teach graphic design and typography at Swinburne led to further academic study there. A B.A. in Graphic Design (1980) was followed by a PhD by research in 2002. The topic of his thesis was the history of chemical printing; notably lithographic chemical transfer and photolithography.

He has been interested in Australian printing history since the mid-1980s and has written papers on Australian type founding, newspaper press directories, and more recently, 'Australia To-Day' and its long-time printer The Specialty Press.

Since 1996 he has operated as a small publisher under the imprint of Golden Point Press, and as a result of his publishing and research pursuits he has become interested in indexing and the design and practical everyday use of finding guides of all kinds.

## Lynn Farkas, *ANZSI Mentoring Coordinator*

Lynn Farkas is director of Lynn Farkas Information Services, a Canberra-based company that specialises in the practical management of organisational knowledge. Her particular interests include thesaurus development for portal sites, knowledge management applications, information architecture and taxonomies, metadata and database indexing. She has indexed for most of the major bibliographic databases in Australia and created the MAIS (multicultural) and OMBIS (ombudsman's) databases in the 1990s. She has prepared thesauri in the fields of multiculturalism, museum objects, seniors issues, aviation, workplace relations and Maori culture, and information architectures for an irrigation portal and a website for government lawyers. Before founding her own company, Lynn worked as a special librarian, indexer and later as a teacher in library studies. She has conducted many professional development courses, including training for the National Library of Australia and the State Library of New South Wales. In 2001, Lynn presented workshops on metadata creation to over 180 librarians in Thailand and Malaysia, and gave seminars on

knowledge management, mentoring, database indexing and subject gateways to the 'Online Information and Education Conference: Managing Knowledge in the Modern Library' conferences in Bangkok and Kuala Lumpur. Lynn is past President and currently Mentoring Coordinator of the Australian and New Zealand Society of Indexers.

## Jennifer Gawne & Kathy Simpson, *Sensis, Melbourne*

Jennifer Gawne has been working in libraries and information access for over 30 years. Kathy Simpson has nearly 20 years experience in special libraries. In their current positions, Indexing Specialists, Headings Rules and Standards, Marketing, Sensis Pty. Ltd., they apply knowledge and skills from traditional library and indexing practices to new and traditional resources in some very new media, and often, in some very strange ways!

## Sharon Gray, *Melbourne*

Sharon Gray's column in The Age newspaper began in 1984, and it has run continually. It is possibly the longest running column in a newspaper in Australia. Three collections of columns have been published and Sharon hopes to publish a fourth next year, to celebrate the column's 25th year.

Sharon also works as a facilitator and editor for the Makor Jewish Community Library's Write Your Story project, which has published over 60 memoirs from the Melbourne Jewish community and three anthologies.

## Shauna Hicks & Simon Flagg, *Public Records Office Victoria*

Shauna Hicks has worked in archives and libraries since 1981 including the State Library of Queensland, John Oxley Library (Brisbane), Queensland State Archives, National Archives of Australia (Canberra) and since 2003 with Public Record Office Victoria. Shauna has a number of qualifications including a Master of Arts in Australian Studies, a Diploma of Family History Studies and a Graduate Diploma in Library Science and also maintains professional memberships of the Australian Society of Archivists, the Records Management Association of Australia, the Australian Library and Information Association and the Professional Historians Association (QLD). A keen family historian and researcher Shauna combines both her hobby and her profession into a mission to provide easier access to archival records.

Simon Flagg is a descendant of the Wemba Wemba people from the Swan Hill region in Victoria. In February 2007 Simon was seconded to Public Record Office Victoria (PROV) as the Acting Manager of the Koorie Records Unit (KRU). In this role he manages the implementation of the Wilam Naling report recommendations to enhance access to Aboriginal records. Simon is also the newsletter editor for the Indigenous Issues Special Interest group within the Australia Society of Archivists.
Simon commenced employment with the National Archives of Australia (NAA) in 2002 as an indexer on the Bringing Them Home (BTH) Name Index Project. In 2004 he took up the joint position of Koorie Reference Officer for NAA and PROV. Through this position Simon has promoted both NAA and PROV Aboriginal collections, with the main focus on the former Aboriginal Protection and Welfare Board Victoria.

Simon has also been involved in the compilation of Footprints, a publication that showcases how records can be transformed to tell the life story of an Aboriginal

family. The publication provides a different insight into Aboriginal life which has rarely been seen before and is due to be published in 2008

## Jon Jermey, *Freelance Indexer, NSW*

Jon Jermey is an indexer, computer consultant, internet journalist and web programmer. He has twice been Webmaster for ANZSI and has co-written two books, *The Indexing Companion* and *Website Indexing* with Glenda Browne.

## Wallace Kirsop, *Centre for the Book, Monash University*

Wallace Kirsop is an Honorary Professor in the School of English, Communications & Performance Studies and Director of the Centre for the Book at Monash University. He taught French at that institution from 1962 to 1998 and edited the *Australian Journal of French Studies* from 1968 to 2002. His research and publications chiefly concern the history of the book trade in France (XVIIth, XVIIIth and early XIXth centuries) and Australia (XIXth century). He is General Editor of *A History of the Book in Australia* (UQP – in progress).

## Jeanne MacKenzie, *Senior Information Specialist, National Centre for Vocational Education Research (NCVER), Adelaide*

## Pru Mitchell, *education.au, SA*

Pru Mitchell works at education.au, Australia's national ICT in education agency as Senior Information Officer with the Education Network Australia (edna) project. Her previous experience as a teacher librarian spans a number of education libraries: K-12, TAFE and the Barr Smith Library, University of Adelaide. Her current position with edna involves web indexing and information architecture in an education context, and Pru is constantly challenged by the intersection of emerging technologies, information management and lifelong learning. She is currently a member of teams working on education metadata, personalisation and tagging, and she is also a member of the Schools Online Thesaurus (ScOT) Management Group.

## Kerry O'Sullivan, *AMIRA, Melbourne*

Most of Kerry O'Sullivan's career has been spent in and around the mineral exploration industry. After completing a doctorate at the University of Wales in 1971 he joined CRA Exploration in Melbourne as a geologist, going on to manage a broad portfolio of technical support services and research projects for CRAE and its successor, Rio Tinto Exploration. From 1999 he became increasingly involved with developing and managing AMIRA International's on-line mineral deposit database, *Data Metallogenica*, for which he is currently Project Manager.

## Renée Otmar

Renée Otmar is a long-standing member of the Society of Editors (Victoria), including three terms as president. In 2000 she was awarded honorary life membership of the Society. She was a founding member of the Council of Australian Societies of Editors (CASE) in 1998, and took an active role in its progression towards a national organisation for editors in 2005, the Institute of Professional Editors (IPEd). Currently she convenes the group assigned to develop the first national accreditation scheme for editors, due to be launched in 2008.

In partnership with a colleague, Renée has designed and presented countless workshops and seminars, including to RMIT's Graduate Diploma in Editing and Publishing students, training editors in basic business and marketing skills. She has delivered numerous presentations to conferences, seminars, workshops and other professional development courses.

## Andrew Pentecost, *Maxus, Melbourne*

Andrew Pentecost has a Bachelor of Arts with Honours in French and a Master of Arts in Librarianship. After completing his librarianship qualification, he worked in technical libraries, including more than 10 years at the Australian Road Research Board (now known as ARRB Group). He managed the library at ARRB and was also responsible for production of the Australian Transport Index, a major bibliographic database of local and international information on roads and transport. This role included tasks such as thesaurus design and maintenance, indexing of database records, and provision of database records to a number of external resources. Since leaving ARRB five years ago, Andrew has been working as a Client Support Consultant at Maxus Australia, a major international reseller of the Inmagic software. Andrew's role includes technical support, software sales, training, product development, and scripting. He is also the Maxus contact person for MultiTes thesaurus construction and management software.

## Pam Peters, *Dictionary Research Centre, Macquarie University*

Pam Peters is Professor in Linguistics and Director of the Dictionary Research Centre at Macquarie University. She researched and wrote the *Cambridge Guide to English Usage* (Cambridge University Press 2004) and the *Cambridge Australian English Style Guide* (Cambridge University Press 1995). As director of the Post Graduate Program in Editing and Publishing at Macquarie University, she works with trainee editors, and convenes the regular Style Council conferences for language-using professionals in Australia. She contributed six chapters to the sixth edition of the *Australian Government Style Manual* (John Wiley 2002), and is a member of the ABC's Standing Committee on Spoken English.

## Sherrey Quinn, *Libraries Alive! ACT*

Sherrey is a librarian and a partner in Libraries Alive!, a Canberra-based specialist library and information management consulting firm. Before establishing Libraries Alive! Sherrey worked in libraries and managed information services in a number of Australian science and technology research organisations. She has worked on indexing, documentation and training projects for several Australian databases. Sherrey is an experienced back-of-book and database indexer, and she has a long-term interest in thesauri – as an indexer, thesaurus developer and online searcher. It is this background which lead to her interest in corporate glossaries and involvement in the project described in her paper.

## Saeed Rezaei Sharifabadi, *Head of Department of Library and Information Science, Faculty of Education and Psychology, Alzahra University, Vanak, Tehran, Iran*

Saeed Rezaei Sharifabadi, is a PhD in Library and Information Science (Graduated from UNSW in 1996) and currently an Assistant Professor at the Department of Library and Information Science, Faculty of Education and Psychology, Alzahra

University and Deputy National Archivist of Iran. His research is mainly about information seeking behavior and I.T. Applications in Libraries. His Ph.D. Thesis entitled "Effects of the Internet on Research Activities, Information Seeking and Communication Behavior of Australian Academic Psychologists" (Supervisor: Professor Carmel Maguire). He has published several articles and book chapters.

## Geraldine Triffitt, *Canberra, ACT*

Geraldine Triffitt is a librarian and linguistics graduate from the Australian National University who worked at the National Library of Australia and other libraries before becoming the Bibliographer (Linguistics) at the Library of the Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS), until her retirement in 1997. She founded the ACT Region Branch of AusSI and was the first President. Since her retirement she has worked as a contract indexer and librarian and was co-compiler of *OZBIB: a Linguistic bibliography of Aboriginal Australia and the Torres Strait Islands* (1999).

# Keynote Address

# Indexing past and present – whither the future?

**Geraldine Beare**

*Freelance Indexer, UK*

## Abstract

*Indexing has come a long way since Ptolemy produced a name index to his first world atlas in AD 150. During the Middle Ages signs, such as the outstretched index finger in Barnewell Priory's* Liber Memorandorum*, were used to indicate a particular item in a document. By the Eighteenth century indexes as we might know them were beginning to take shape and these were perfected during the following century. Henry B Wheatley, the father of indexing and the founder of the Index Society in 1878 wrote a useful treatise on indexes and indexing which was the basis of the modern index. However, in the 50 years since the Society of Indexers was founded by G. Norman Knight, indexing has changed very little. We continue to produce detailed back-of-book indexes – but are these what the reading public really want? The advent of the World Wide Web, search engines, and Google – not to mention the global nature of publishing - mean that indexes and indexing as we know them are changing. New types of indexes are being produced not just to the written word but also to sound and image. Outsourcing is having an impact on who we work for and the practicalities of language, culture, time, payment and what is required generally. We need to change and consider carefully what we are doing. Just how relevant is a comprehensive index to younger generations who are geared to looking for their information on the internet in a simplified form; will technology take over more of what we do; and can we influence any of the changes before it is too late. All of these areas will be covered in this opening address.*

As indexers we are in the business of information retrieval and an index is the best means we have of doing this. Indexes as we would recognise them have been around for several centuries, but the business of retrieving information has been around for millennia.

Cave art is our first indication that primitive man was interested in preserving a record of his way of life. By cave art I mean not only the paintings to be found throughout the world from the famous caves at Lascaux in southern France, which were discovered by accident in 1940 by three schoolboys, to the Akakus Mountains in Libya and Central Arnhem Land in northern

Australia, but also to engravings and tools, for instance the giraffes found at Niger and the elegant ground stones found in the Ténére Desert in Algeria. Scenes of everyday life are shown, and so also are scenes of hunting, trading, mythology and abstract design. Each generation reads and interprets them according to the evidence available. It is both a sociological and a scientific exercise. Scientifically, the cognitive abilities of early man are being studied and sociologically, the linguistic movement spearheaded by Ferdinand Saussure has been a great help as has the work of Claude Lévi-Strauss, in particular his four volumes on *The Logics of Myth*. Upper Paleaolithic art shows the modern viewer what life was like thousands of years ago – the images are in themselves an index. At the time they were made they acted as aide-mémoires for the people showing where animals could be found, how to kill and cook them, how to conduct their lives and perhaps how to just appreciate the images as art, not to mention the mystical element that runs through much of the imagery. Interestingly for us many of these primitive paintings and engravings, wherever they may be found, have a hand motif in them – sometimes singly or in groups. The pointing finger is very important once we reach illuminated manuscripts and indeed the index finger is so called because it is the pointing finger.

For a true index to come into existence, at least as we would understand it, a written language needs to be invented and the written language needs to be capable of some sort of ordering. Early types of written language do seem to be unsuitable even though they can be remarkably user friendly as for instance Sumerian pictograms. On the other hand Etruscan and Phoenician are even now indecipherable – or rather attempts have been made to decipher these marks – but there is no consensus on their meaning. Similarly rongorongo – an allographic system from Easter Island.

Hieroglyphic signs first appear around 3000BC. The Egyptian language developed over a period of 26 centuries and included several stages. Old Egyptian corresponds to the language as it was used during the Old Kingdom and the First Intermediate period (27$^{th}$ to 20$^{th}$ centuries BC); Classical or Middle Egyptian during the Middle Kingdom (20$^{th}$ to 17$^{th}$ centuries BC); New Egyptian which started in the period of Akhenaten (16$^{th}$ to 11$^{th}$ centuries BC) and finally Ptolemaic which is what is seen on the walls of the great temples constructed during the last native dynasties and the late Roman empire (c.393BC-394AD). It is during this latter period, sometime during the 4$^{th}$ century AD that the Egyptian language disappeared in all its most traditional forms thanks to the Emperor Theodosius having prohibited the practice of pagan cults. As a result, no more hieroglyphic texts were written in the Nile Valley. Naturally, as the years went by no one was any longer able to decipher this writing since the Egyptian priests did not leave behind a grammar that would make it possible to understand the mechanics of their language. The discovery of the Rosetta Stone in 1799 provided the key. It appears to have been inscribed around 157 BC at the beginning of the reign of Ptolemy VI Philometor (c.191-145BC) and was in the main translated during the early 1820s by Jean-Jacques Champollion (1790-1832)

Although hieroglyphics do not look a very promising start to the making of an index, nevertheless it is possible to make a case for the first index to have been produced for what is known as the *Amduat* or the *Book of the Hidden Space*, which appeared during the Egyptian New Kingdom. This book portrays the journey of the sun-god Ra through the twelve hours of the night. There is a separate chapter for each of the hours and each of the twelve sections contains an introduction followed by three registers containing pictorial depictions together with a commentary and the names of the beings depicted. This in essence is an index for it is a catalogue of the figures presented in pictorial form with captions. (Wheatley makes the point

that although terminology changes over the years the changes in general refer to similar things ie table, register, calendar, summary and syllabus all had similar meanings). The earliest known complete version of the *Amduat* is dated to Tuthmosis III, an 18th dynasty Pharaoh who was initially co-regent with his mother Queen Hatshepsut but reigned independently until about 1425BC.

Even earlier, around 1800BC catalogues were being produced of books (ie clay tablets) held at Hattusas in north central Turkey. Hattusas, now Bogazkoy, was the capital of the Hittite Empire. A whole archive of clay tablets have been found, stored on wooden shelves, covering contracts, official documents, oracular prophecies, folklore, legal decisions and historical texts. Each entry begins by giving the number of tablets that made up the work being recorded, then the entry identifies the work itself by giving the title which may be by citing the first line or by giving a capsule description of the contents and then it tells whether the table marks the end of the work or not. A fairly sophisticated method for finding what one is looking for. Similarly at Nippur, a Babylonian city some 160 km south east of Baghdad two tablets have been found both inscribed with a list of Sumerian works of literature – various myths, hymns and laments. One has 68 titles and the other 62 though neither of the lists is in any discernible order. Since writing had first appeared a thousand years previously and since this writing is in the main inscribed on clay tablets – a remarkably useful and long-lasting material – it is quite possible that catalogues first appeared a lot earlier than 1800 BC. Certainly, when archives started to come into existence – and these were around from at least 2300 BC – then the cataloguing of contents would have been essential.

Ashurbanipal, Assyria's last important ruler who held the throne for nearly 50 years from 668-627 BC, was the man who is credited with introducing the first systematically collected library in the ancient Near East. It was discovered at Nineveh and contains hundreds of examples of writings of all sorts including the wonderful Epic of Gilgamesh. It was founded for the 'royal contemplation' but seems to have been available to other interested users. Most modernly, it contains exhortations to readers to take care of the tablets and not to deface them: 'In the name of Nabu and Marduk, do not rub out the text!' or 'Who rubs out the text, Marduk will look upon him with anger.'

Moving westwards the Greeks meanwhile were also coming to grips with written language. They borrowed the Phoenician language and adapted it for their own use. The Phoenician alphabet had 22 letters though the first Greek alphabet probably had 26. The Etruscans in turn copied the Greek letters around 700 BC and were followed by the Italian peoples, including the Romans. As the Romans conquered the lands around them so their language and alphabet came to be used. After the collapse of the Roman Empire the Roman letters were fitted to newer tongues, including primitive English around AD 600. Today about three-quarters of the world's population live in countries where an alphabet or alphabet-based script is the national writing system. Only Chinese, Japanese and Korean systems are not alphabetic. (According to the experts the alphabet was invented sometime around 2000 BC by Semites who lived as foreigners in Egypt. They were inspired by the Egyptian writing systems). By 500 BC Homer's verses were being read. The Greeks used a variety of materials to write on including what is known as scratch paper- actually discarded chunks of broken pottery, wax tablets (panels of wood with one side coated in wax), a form of paper made out of papyrus and parchment and other prepared skins. Bookselling was a flourishing industry by the beginning of 4th century BC and libraries were a necessary institution, the most famous being the one at Alexandria. This was founded c.300 BC. It was the policy of the library to acquire everything from exalted epic poetry to humdrum cookbooks. The Ptolemies, who reigned between 305

BC and 30 BC, aimed to make the collection as comprehensive as possible and they spared no pains at acquiring everything in sight but in particular originals. Lycurgus, Athens' political leader from 338-325 BC had passed a law stating that: 'written versions of the tragedies are to be preserved in the records office, and the city clerk is to read them, for purposes of comparison, to the actors playing the roles, and they are not to depart from them.' The reason for this was that since every copy of a book was done by hand errors inevitably crept in leading eventually to a script that could be very far from the original version. This was not helped by actors themselves wilfully changing the text to suit their needs.

Once a book arrived in the Alexandria library they were stacked in warehouses and tabs were attached bearing the author's name and provenance. The rolls were sorted according to the nature of their contents and then placed either in the main library or the daughter library. The former had a more restricted access than the latter and contained some 49,000 rolls (the latter had 42,800). The man in charge was Zenodotus who lived during the reigns of the first two Ptolemies. He was a pioneer in library science and to him goes the accolade of alphabetical order as a mode of organization. The alphabetization only went as far as the first letter but this was to be standard practice for many centuries – right up to the nineteenth century – although a fuller alphabetization did make an appearance as early as the second century AD. His successor, Callimachus (c.305-240 BC), went even further. He produced 120 volumes containing a detailed bibliographical survey of all Greek writings. He made initial basic divisions into poetry and prose then broke those down into subdivisions such as writers of tragedy, comedy, lyric poets and so on. Each author had a brief biographical sketch and a list of his works in alphabetical order. A key problem – familiar to us today – was how to handle entries that involved more than one category. There is no way of knowing whether or not he used cross-references but it is highly likely that he did. Both Zenodotus and Callimachus lived during the first half of the third century BC and their contribution to classification was immeasurable, but a final contributor to scholarship who should be mentioned is Dionysius the Thracian who lived c.100 BC. He it was who sorted out the elements and aspects of Greek grammar. He wrote a treatise in 50 pages covering the letters of the alphabet and the parts of speech which was to be the standard text right up to the 12th century. The Romans based their Latin grammars on it and through these it became the model for all modern grammars.

The library at Alexandria did not survive, the end probably coming in AD 270 when the Emperor Aurelian, in the course of suppressing the insurgency of the kingdom of Palmyra, engaged in bitter fighting in Alexandria. The whole palace area was laid waste along with the library.

During the first century AD several writers began arranging their material in user-friendly formats including Pliny the Elder (23-79 AD) who wrote his universal encyclopaedia, *Historia Naturalis*, in 37 volumes of which the entire first volume is a table of contents in which he lists, book by book, the various subjects discussed. Ptolemy (Claudius Ptolemaeus), an Egyptian astronomer and geographer, compiled his *Atlas of the World* around 150 AD which contains a catalogue of places with latitude and longitude, general descriptions and details regarding his mode of noting the position of places. This work is considered by many to be the first index. And there were others such as Valerius Maximus who wrote a collection of memorable deeds and sayings c.30 AD and Aulus Gellius who wrote *Attic Nights* c.160 AD, an assortment of items on Greek and Roman history, philosophy, grammar, rhetoric and antiquarian material in general.

Moving on in time we now come to Britain in the medieval period. Christianity had a

profound effect on the production of texts. Controlled by the Church, illuminated manuscripts are the glory of the period and it is in these that we once again comes across the hand motif, only this time much more refined, first noted in Palaeolithic cave art. Here the hand, or rather the pointing finger, is used to denote a particular passage that should be read and noted. Pointing fingers can be seen in marginalia as well as in the initial letters. One could view this as a somewhat retrograde step in the progress of the history of the index, and of course this is so, yet it is a very effective method of accurately indicating an important piece of text or image. Why produce an index when one is constantly reading and re-reading the Bible which was *The* text above all others and known by heart by many: what the monks needed was not so much an index but an indication of where important passages were located on a page

Yet inexorably the need for indexes grew as the Viking raids and the Norman Conquest receded in memory and the country became more settled and unified. As a result, the number of lists and surveys, commentaries, writs and record-keeping increased exponentially. And libraries once again came back into fashion thanks to the Dominicans. The Dominican rule of Humbert de Romanis (c.1260) lays down all the principal duties of a modern librarian: choosing a good site for the building and making sure it is secure, waterproof and well ventilated; that it has sufficient shelving and that the shelves themselves should be designated to different subjects; that there should be a catalogue of books and that the stock should be kept up to date.

The peripatetic nature of court and nobility meant that household records, Chancery rolls and other necessary documents usually accompanied the king and his court, but eventually the sheer number of these documents made it impossible to carry them safely around the countryside and permanent repositories were found. Generally the documents were kept under the safekeeping of cathedrals and monasteries and most of the principal towns had their own royal archives complete with official archivist. Finding what one wanted was not easy but eventually enterprising clerks came up with the solution of creating extracts of the royal documents. The most remarkable collection of extracts is Barnwell Priory's *Liber Memorandorum* which was composed in the 1290s. It contains texts of nearly 90 official documents and the compiler makes it clear that, 'It will not be necessary in future to go to the castle to see the sheriff's roll, but rather the facts can be seen and learned from this book.' The compiler also notes that 'this record is to be found in a certain roll on the white part (ie top side of the parchment) at the end of the roll where this sign is depicted.' The sign in question is a hand with outstretched index finger and this can still be seen in the Public Record office at Kew.

Mental indexing was also practised. To learn all 150 psalms in the Psalter for example it was recommended to make a mental grid of 150 sections, place the Psalms in order within and then learn them by heart. This was especially useful when pagination might differ from one copy to the next. But why was an alphabetical index not used more often? There is no answer to this though the principal as we know had been existence for centuries. There are examples of alphabetical arrangement from quite early on, a delightful example being the Initial 'A' of St Jerome's dictionary in which is drawn a man frantically trying to teach a performing bear the ABC by beating it with a stick to make it cry out 'A'. By the end of Edward I's reign (1239-1307) alphabetical indexes had been made to parliamentary statutes and other law books and in English Bibles of the 13$^{th}$ century, the list of Hebrew names is arranged in strict alphabetical order to the third or fourth letter of each word.

With the advent of printing in the middle of the 15$^{th}$ century however everything changed.

Multiple copies of works could be distributed throughout the land and across the world. The Church no longer had control over what was being written and texts in the vernacular, including the Bible, became commonplace. Erasmus and Martin Luther ushered in the Reformation and by the 17th century a wide variety of print was being produced. Newspapers, novels, books with images, playing cards, pamphlets, childrens' publications and magazines proliferated and so did the art of indexing initially to books of reference such as herbals.

Shakespeare mentions indexes in several of his plays and Thomas Fuller commented in 1650 that 'An Index is the bag and baggage of a book, of more use than honour, even such who seemingly slight it, secretly using, if not for need, for speed of what they desire to find.' By the nineteenth century the value of indexes were commented upon by a number of eminent writers including Thomas Carlyle and Lord Campbell who proposed that any author who published a book without an Index should be deprived of benefits of the Copyright Act. A certain John Baynes went further and said 'that the man who published a book without an index ought to be damned ten miles beyond Hell, where the Devil could not get for stinging nettles.'

It is at this point, in the 1870s, that a flurry of correspondence appears resulting in the setting up of the Index Society. The first Annual meeting was held on 26th March 1878 at the Royal Asiatic Society in London. In the chair was the President the Earl of Carnarvon and the Secretary was Henry Benjamin Wheatley. There were four Vice presidents including Robert Harrison, Librarian of the London Library, who had written the article in the Athenaeum (1854) which had been the bugle call to the formation of the Society. Institutional members included the Berlin Royal Library, the Dublin National Library, the Patent Office in Washington and numerous universities including three Oxford colleges.

Several large projects were proposed and several were mentioned that were already under construction including a General Index of the Journals of Congress from the organization of the Government to the present time and an Index to the drawings in the manuscript Department of the British Museum which had just been published. It was the opinion of Wheatley and the Index Society that indexes to subjects and in particular to periodicals and journals was the way forward. They wanted to see large-scale comprehensive indexes covering as many sources as possible – a very ambitious idea which only now, in the age of the World Wide Web, could possibly work.

The Society was plagued with financial problems and in 1891 it amalgamated with the British Record Society's index library.

All went quiet for several years but the idea of alphabetization and indexing by default continued to be in the consciousness of many individuals – and publications! *Punch* magazine, never slow to follow – or indeed lead – trends illustrated the usefulness – or otherwise – of the alphabet. But there were serious people out there beavering away indexing and writing about the subject. Wheatley himself had written a treatise on *What is an Index?* which was published by the Index Society in 1879. He makes the point that many books were and remained unindexed and as a result readers from students to researchers often made their own indexes. He laments that 'the occupation of the indexer has been allowed to fall into disrepute during the present century, and some have supposed that any ignorant hack can produce this indispensable portion of a book.' He goes on, 'An ideal indexer needs many high qualifications; but unlike the poet, he is not born but made.' (Some would dispute that I think). He must be a good analyser and know how to reduce the author's many words into a

terse form. He must also be continually thinking of the wants of the consulter of his index, so as to place his references under the heading that the reader is most likely to seek.' Quoting from an article that had appeared in the *Monthly Review* he reinforces this: 'The compilation of an index is one of those useful labours for which the public, commonly better pleased with entertainment than with real service, are rarely so forward to express their gratitude as we think they ought to be. It has been considered as a task fit only for the plodding and the dull; but with more truth it may be said that this is the judgment of the idle and the shallow.' But despite these words, as we have seen, the Index Society folded after 12 years and it wasn't until 65 years later that another attempt was made to set up a society devoted to indexing - and so far this society has been highly successful. I am of course referring to the Society of Indexers. The idea for the Society came from Gilfred Norman Knight who had begun indexing in the 1920s. On his retirement he decided to pursue his interest and after writing letters to national papers and organising several discrete luncheons at the Civil Service Club, the Society of Indexers was born. The inaugural meeting was held on 30 March 1957 at the National Book League in London. On 8th May *The Times* wrote: 'There are far too many societies. But plenty of people will readily supply a list of half a dozen that can be dispensed with in order to make room for the newly formed Society of Indexers. Here is a necessary body if ever there was one.' Nowadays, not only is there the original Society, which this year celebrates its 50th anniversary, there are also societies in America, Canada, South Africa, China, Germany, the Netherlands and of course Australia and New Zealand.

Indexing is a highly skilled profession. We are regulated by Standards, guided by books and articles, taught via correspondence courses and keep in touch with one another through publications, meetings, conferences, email and chat lines. In the main, we work as we have done for years – centuries even – compiling to a formula indexes to books and periodicals though other media are also being indexed including still and moving images and sound. We work to deadlines and for not a great deal of money. The look and content of the index has changed very little since Wheatley's time; we continue to produce detailed entries which both author and editor expect – and with which, to a large extent, we agree. We are hired, if that is the right word, by editors, some of whom work in-house, but others are freelance like ourselves. But times are changing – and rapidly. Outsourcing is increasing and publishing is jumping on the bandwagon with alacrity. India appears to be the country of choice that publishers are going to and for good reason. Over the last ten years or so a number of enterprising companies have set up businesses to provide electronic support facilities to e-publishing companies. Their target markets have been professional, trade, medical, legal, scientific/technical, scholarly, reference and college publishing. They provide an integrated, flexible and efficient service at a fraction of the cost and with the ability to seemingly work 24/7 they are constantly accessible and willing to do whatever is asked of them. A major plus is their ability to speak English and since their main markets at the moment are the UK and the US – and now Australia – they are beginning to have an impact on areas of publishing not previously considered viable outside the home country. For instance, *The New York Times* is already outsourcing many of its publishing tools from a US-based software company which is off-shoring work to India. Reuters has made the decision to move editorial services from US and Europe to India and digitalisation work of US newspapers is also being outsourced to the Indian companies. If journals can be dealt with overseas then so too can books. And they are. TexTech, a company barely 18 months old and based in Chennai, has recently acquired an American publisher, Stratford Publishing. It now has a customer base spanning four continents: US, UK, Australia and India and its customers include the world's largest publishers of higher-education, school and trade books. It is the vendor of choice for a large school book-publisher in the UK. Integra-India is 13 years old and is another company with

bases in US, UK, Netherlands, France, Germany and Australia. It includes as its customers, Elsevier, Pearsons, Thomson, Springer, OUP, CUP, Taylor & Francis, Wiley and Palgrave Macmillan. It has offices in both the UK and US, is based in Pondicherry and is currently positioned amongst the top five e-publishing companies in India. It is a pioneer in e-publishing and has recently acquired a financial partner in the shape of Barings-India. Outsourced publishing services overall are currently running at about $4.5billion of which $200million is being outsourced to India. According to a recent report by Capgemini and IDC 85% of companies are saving at least as much as they invest in outsourcing. 63% of companies are investing the savings back into the organization to improve operational performance, drive innovation or support growth and 44% of businesses surveyed said the most important criterion in selecting a Business Process Outsourcing (BPO) provider is its ability to deliver transformational services. Tata Consulting Group, another huge Indian company which has recently taken over Corus, is the first service provider to generate one billion dollars in a quarter and the company has doubled in size every 30 months. 50% of the world's GDP is services – and the sky is the limit.

But this is not the only possible threat to our way of working. And it is a threat since although the Indian companies continue to employ indexers and proofreaders from UK (and presumably US) nevertheless they are growing their own professional indexers who will at some point take over. No – the main threat comes from the World Wide Web and technology in general. Information is easily obtained just by Googling a question. Books, journals, newspapers, reports, surveys all are being produced on the Web and are fully searchable right down to the images, tables and advertisements and what's more they can be downloaded into ever-more user-friendly hand-held devices. This isn't to say that books will vanish - they are far too nice for that. But looking to the future, bookshops may not be around – at least not in the form we know them now. All publications will be uploaded to a publisher's website from where customers will be able to download what they want. Printers and binders will be sitting in dedicated office space in our homes or we will be able to go to a dedicated site where one will be able to go online, sample chapters, decide whether one wants the book (or magazine) and then arrange for it to be downloaded, printed and bound however we want. This site may well be the old bookshop and it may well have a range of books and periodicals for one to see – but not to buy – for those who don't want to peer at a screen. It wouldn't matter what kind of publication – academic, scientific, art, biography, novel – all would be available to mix and match at will.

But what about the index? Well – if we go the route I've just suggested, then back-of-book indexes could well be redundant. Text would automatically be searchable either on an individual book-by-book basis or across a range of media. On the other hand, custom-made indexes could be generated at the point of download containing all the references necessary. At the moment, if we want any information we are directed to a print-based site. If we want information from other sources such as film, television or radio, specific publications such as *Private Eye* or more general sources such as newspapers and journals then we must do separate searches for each of these. In future the search engines will link us to the various sources as a matter of course – in fact Google is working on this at the moment – and Wheatley's vision will almost certainly come true. This will take time – but not that much. Think back 10 or even 5 years. Remember when there was no email, when computers were slow, when the World Wide Web and broadband weren't even thought about, when indeed indexes were still being produced on 5x4 cards – and that is less than 20 years ago. In 1991 there was just one website; in 2003 there were 60 million. People spend on average 49 seconds on any one site looking for what they want. If they cannot find it they move on.

Speech, image and multi-lingual retrieval are all happening. Cross-border searches are now possible to the extent that one can type in a question in one country, have it searched in another country in an entirely different language and then have the answer returned in the originating language. Digitisation continues apace. Thomson Gale for instance has digitised hundreds of thousands of books from the 18th to the 20th centuries. HarperCollins is transferring all their physical books into a virtual, digital warehouse. Several thousand titles are already available on their website and several thousand more will be made available over the next couple of years. Google tweaks its algorithms every month to improve searching and natural language is the Holy Grail of the computing world. No more simple questions and endless possible answers – sensibly worded queries with more focused results is the goal.

Today one must ask oneself: Do readers still want the detailed indexes we at present produce? Certainly authors, publishers and ourselves do and we would throw up our hands in horror if it wasn't so. But should we not be thinking in terms of simplifying the index? In a biography, think of the columns dedicated to the biographee. Do we really want all that information? Google the name and information comes up. Maybe we should return to the pointing finger to tell us what is important. Some sites will highlight sections of text that is of interest – the *New Dictionary of National Biography* does this and it works well. It is one of the best sites for not only giving you the information you want on anything that appears within the database, but will direct you to related people and subjects as well. Recently it has started producing articles of specific interest which are also beautifully searchable and is very fast and easy to use. Time for people is of the essence. Do readers want to plough their way through our wonderfully detailed, lovingly produced indexes? I believe that the visible index as we know it will vanish, but that the hidden index as represented by the search engine will grow and improve, become more sophisticated and user-friendly.

To conclude I would like to leave you with a comment written by Eric Hoffer who was born in 1903 in the Bronx. Self-taught and an omnivorous reader, he was an itinerant worker during the 1920s and 1930s, became a stevedore during the Second World War and between 1951 and 1982 wrote 10 books including his most famous one, *The True Believer*, on mass movements. He is a much quoted author and this is one of his most astute sayings: 'In times of change, learners inherit the world, while the learned remain beautifully equipped to deal with a world that no longer exists.'

# Report: Database and web indexing 'Birds of a Feather' Session

**Prue Deacon and Kathy Simpson**[1]

## Introduction

Participants in this session were from a range of sectors (education, parliamentary, health, university, freelance) and had experience with a range of indexing tasks (database indexing, metadata, cataloguing, directories, taxonomy, thesauri). The discussion was free flowing with many ideas raised but without trying to reach consensus. The session was chaired by Prue Deacon.

## Summary

The future of database indexing is changing with databases closing down. This may be for economic reasons or because of changes in user behaviour. It is possible that users expect to find all the information they need via a search engine. There was a suggestion that metadata does not work because people have lost interest in ensuring a high quality of metadata and not all search engines use it.

Indexers should be at the forefront of technology changes and be proactive in suggesting ways to improve retrieval of information. Indexers could be more involved in intranets and Content Management Systems; in fact this could be the future of web indexing.

## Particular issues

- Once ceased, it is difficult to start a database again, especially to index the missed period retrospectively.

- It is difficult to find some important, but older, government publications – they tend to be hidden or even archived from agency websites. Some action was taken with the National Library Pandora project but the problem is not fully solved.

[1] Reprinted with permission from *ANZSI Newsletter*, vol. 3, no. 5, June 2007, p. 4.

- Metadata was sold as being 'easy' – implementation in government has been inconsistent and inaccurate, making search results worse rather than better. There is a big demand for training in cataloguing but, although metadata was seen as an opportunity for cataloguers, the time may have passed. 'Metadata is a dead horse we are flogging'.

- Users often get good results from quick searches on Google or other full text search engines. Hence it can be hard to demonstrate the benefits of metadata or other indexing. But good metadata can lead to better search results.

- There is a whole generation of people coming up with different expectations. Undergraduates may be content with whatever they can find easily on the Web. Postgraduates may be more discerning and understand other ways of getting information.

- It is a problem that indexers are a long way away from the users and do not really know how they use indexes. For example users will not look up a thesaurus and will try a quick search in preference to a harder but more accurate advanced search. They need information in a hurry but may waste time checking search results of little relevance. Indexers and cataloguers must save the time of users if their work is to be valued.

- The IT world will not come to indexers. Indexers need to be proactive and offer their skills to search engine developers. Web developers also make decisions without knowing what users want. Perhaps indexers need IT qualifications. Or perhaps they just need to make sure that indexing skills are seen as an essential part of system development.

- Indexers could also offer their skills to Content Management System designers and implementers. They should look at new trends such as organizing corporate intranets.

# Report: Back of Book Indexing 'Birds of a Feather' Session

**Mary Russell**[1]

This 'Birds of a Feather' session, chaired by Max McMaster, was a general discussion on some issues associated with back of book indexing. The discussion is summarised below.

Max McMaster

## Prepositions and conjunctions

Max presented two versions of filing:

| Version 1 | Version 2 |
|---|---|
| growth | growth |
| effect of deprivation | and mental retardation |
| emotional | and puberty |
| intellectual | and reading |
| and mental retardation | and walking |
| and puberty | and writing |
| and reading | effect of deprivation |
| reflexes and | emotional |
| retarded | intellectual |
| sex differences in | reflexes and |
| social | retarded |
| species differences in | sex differences in |
| spurt in | social |
| and walking | species differences in |
| and writing | spurt in |
| growth of brain | growth charts |
| and nutrition | growth of brain |
| growth charts | and nutrition |

[1] Reprinted with permission from *ANZSI Newsletter*, vol. 3, no. 5, June 2007, pp. 4–5.

Version 1 was the most popular method of filing, except most agreed 'growth charts' should come before 'growth of brain'. Several people suggested leaving 'and' out. This would solve the filing problem and 'and' was not necessary as the entries are pointers to appropriate page numbers. Others disagreed and said 'and' linked two nouns together. The use of '&' was not considered a useful alternative.

It was suggested that 'sex differences in' could be reworded to 'differences in sexes'.

## Medical consultation

Max presented two versions of filing:

| Version 1 | Version 2 |
|---|---|
| medical consultation | medical consultation |
| establish rapport | step 1 – establish rapport |
| explanation and education | step 2 – history taking |
| follow up | step 3 – physical and mental examination |
| history taking | step 4 – investigations |
| investigations | step 5 – explanation and education |
| physical and mental examination | step 6 – prescribing medications |
| prescribing medications | step 7 – referral |
| prevention | step 8 – follow up |
| referral | step 9 – prevention |

The examples had page numbers that spread over five pages, so the subheadings given in version 1 and version 2 were considered unnecessary. For the discussion the page numbers were ignored and the different styles were considered. Version 1 was the most popular as it was thought that author would have explained the steps in order. Version 2 could be useful for procedure manuals where potential users may only be familiar with a couple of steps.

## Undifferentiated locators

AS999 suggests 5–10 locators before need to differentiate. This is an arbitrary figure. Does it relate to the audience and tolerance level? Perhaps a child would be 2–3 while an adult could be 9–10. Max suggests 6–8. While multiple undifferentiated locators can show laziness of indexer, Max had example of 300 locators in *Australian weed control handbook* since each referred to a method of killing that particular weed.

What is a passing reference is not something that can be easily answered.

## Ethical dilemmas

A) Indexing an 18th or 19th century book today that contains derogatory language such as Abos or Blacks. How do you handle the situation?

Use the language of the text with see / see also links to politically correct terms. It may be appropriate to have a preliminary note explaining how the old terminology was handled.
Sometimes words have to be removed from the index as not appropriate. Max gave the example of 'humpy' removed from the index of a book on aboriginal history even though it was mentioned several times in the text. The word has other meanings and even with a qualifier it was not considered appropriate to list in the index. Under these circumstances you may need a 'sensitivity message' at the beginning of the text and/or index.

B) The indexers finds the work offensive or is opposed to the author's views. Can you say No to indexing this work?

Yes. Always get a sample of the work before agreeing to index. You are a professional so try and distance self from the views given in the book. You may tone down the language or views in the index and ask that your name not be published as the indexer.

If several indexers are working on the indexing of journals or newspapers, ask how indexers will handle the contentious articles. It is important to make sure all items are indexed in a similar way.

C) Slabs of information in the book are wrong. What do you do?

Alert the editor or publisher. It is never too late to change information in the text. You may save the publisher from severe embarrassment. If the author insists that the information stays the editor may introduce the section with 'the author believes…'.

## Popular names

How do you index names such as Elvis Presley, Dalai Lama, Homer Simpson, Bugs Bunny and Mickey Mouse?

Need to consider the audience. It may be appropriate to double post entries.

## Prefix 'pre'

A book on health and physical education had the following entries:

pre-game meal
pregnancy
prejudice
pre-menstrual tension
prescription drugs

It was suggested that 'pre-menstrual' could be spelt 'premenstrual', but it was 'pre-menstrual' in the text. Generally agreed that 'pre-menstrual tension' should come after 'pre-game meal'. While you could double post the entries would be close together.

## Mac and Mc filing

There is feeling that Mac and Mc should be filed as if Mac. This agrees with the *White Page* and copes with MacRobinson and Macrobinson. You may need to alter the settings of some of the indexing software packages to cope with this.

Care must be taken if also have African names such as M'Tumbo.

## *The Age*

Several options were given:

*The Age* (filed under A)
*Age*, *The* this is the defacto standard
*Age* (The)
*Age* (Newspaper)

I find I always come away from this type of session with something to think about.

## APPENDIX: Glenda Browne (2007) Filing prepositions and conjunctions in subheadings ANZSI conference example extended, *ANZSI Newsletter*, vol. 3, no. 6, August, p. 5.[2]

In the June 2007 issue of the A*NZSI Newsletter* (pp.4-5), Mary Russell reported on the book indexing birds-of-a-feather session, in which Max McMaster had presented the group with two alternative approaches to filing an index extract in which a number of subheadings started with 'and'. In Version 1 'and' was ignored in filing, while in Version 2 it was taken into account.

| Version 1 | Version 2 | Version 3 |
|---|---|---|
| growth | growth | growth |
| effect of deprivation | and mental retardation | effect of deprivation on |
| emotional | and puberty | emotional |
| intellectual | and reading | intellectual |
| and mental retardation | and walking | mental retardation and |
| and puberty | and writing | puberty and |
| and reading | effect of deprivation | reading and |
| reflexes and | emotional | reflexes and |
| retarded | intellectual | retarded |
| sex differences in | reflexes and | sex differences in |
| social | retarded | social |
| species differences in | sex differences in | species differences in |
| spurt in | social | spurts in |
| and walking | species differences in | walking and |
| and writing | spurt in | writing and |

[2] Reprinted with permission of *ANZSI Newsletter*.

Mary reported: ‘Version 1 was the most popular method of filing… Several people suggested leaving ‘and’ out. This would solve the filing problem, and ‘and’ was not necessary as the entries are pointers to appropriate page numbers. Others disagreed and said ‘and’ linked two nouns together...’

Last month I spoke about indexing at a meeting of the NSW Society of Editors, and took the opportunity to expand this example to include (see the top table) the suggested approach of leaving ‘and’ out (although I inverted ‘and’, rather than omitting it). While people’s references don’t directly relate to best practice, they can give us insight into user’s attitudes to index features. The editors much preferred Version 3.

In indexing classes that I teach I present the students with an index excerpt that has been structured and filed in these three ways. In this second example (the lower table), the entries contain prepositions rather than ‘and’, and the prepositions are deleted rather than inverted in Version 3. The preference for Version 3 is less marked when using this sample, although it is usually still the preferred version, followed by Version 2. The prepositions provide more meaningful groupings than ‘and’ does, thus providing advantages to both Versions 2 and 3.

| Version 1 | Version 2 | Version 3 |
|---|---|---|
| storage | storage | storage |
| in bathrooms | in bathrooms | bathrooms |
| in bedrooms | in bedrooms | bedrooms |
| of disks and tapes in home offices | in home offices in kitchens | disks and tapes |
| in kitchens in living areas | in living areas in small areas of disks and tapes of wine | home offices |
| in small areas under stairs | of wood for fires | kitchens living areas small areas under stairs |
| on walls | on walls | walls |
| of wine | under stairs | wine |
| of wood for fires | | wood for fires |

I had been using this example for a few years before I noticed that I had one remaining preposition in Version 3. Some students think we should be consistent and use stairs’ as the subheading, a few suggest using ‘stairs, under’, but many think that the subheading ‘under stairs’ is necessary to remove confusion.

# Report: Panel discussion – Indexing gardening/botany publications

**Mary Russell**[1]

This discussion was lead by Alex George, Freelance Indexer from Perth, with Roger Spencer from the Royal Botanical Gardens, Melbourne and Caroline Colton, Freelance Indexer, Sydney.

Alex George and Roger Spencer

Alex George provided a very useful handout explaining the classification scheme and format used in plant classification. His handout is reproduced at the end of this report.

Roger Spencer explained the different types of indexes used by botanists, including the *Plant Finder* lists of where to buy particular plants. He explained how detailed lists of plants can go to 7 or 8 levels of hierarchy. Another challenge is how to index plants by their growing habits so for example, red flowering climbers suitable for a west wall can be identified.

The main focus of his paper was the impact marketing had on plant names. There is a growing shift away from botanical names to trademark names in garden centres. Since these are often owned by the provider of goods or services, they can not act as plant names. For example 'Kiwi fruit' is a trade mark for Chinese gooseberry. This, however, does not stop plants being bought and sold using their trademark name, particularly as they often look like common names. This can lead to up to seven different names for one plant. Roger is part of a project developing a standard typographical label for all these various names to be used by nurseries.
Caroline Colton explained the different styles of indexes used in a multivolume work on grevilleas compared to a general gardening book. The work on grevilleas would need to follow plant naming conventions and it may be appropriate to have a botanist check the index before forwarding to the publisher. Decisions would be needed on how to handle the

[1] Reprinted with permission from *ANZSI Newsletter*, vol. 3, no. 4, May 2007, pp. 4–5.

trademark names such as 'Austraflora Copper Gold' versus 'Copper Gold'. Often a multivolume work has a combined index with volume number preceding page numbers.

In a general gardening book how to handle common names would need to be decided, particularly with names such as 'Daisy Buttons' that could refer to several different plants.

The house style used by publishers can dictate how entries are arranged. For example:

| Version 1 | Version 2 |
|---|---|
| *Grevillea* | *Grevillea* |
| *G. biternata* | *G. biternata* |
| *G. robusta* | *G.* 'Ivanhoe' |
| *G.* 'Ivanhoe' | *G.* 'Pink Pearl' |
| *G.* 'Pink Pearl' | *G. robusta* |

It may be appropriate to list all subjects related to Grevillea after the list of specific species. For example:

*Grevillea*
*G. biternata*
*G. robusta*
*G.* 'Ivanhoe'
*G.* 'Pink Pearl'
for fire prone areas
ground covers

There are several useful websites to assist with plant names including the Australian Plant Name Index http://www.anbg.gov.au/apni/index.html and the Royal Botanical Gardens, Kew (UK) electronic Plant Information Centre http://www.kew.org/epic/index.htm.

This concluded a very instructive session.

## APPENDIX: Alex S. George (2007) Indexing botanical and horticultural texts, *ANZSI Newsletter* vol. 3, no. 4, May, pp. 5–6.[2]

### Classification of plants

- The ranks most commonly used in plant classification are:

  family, e.g. Myrtaceae
  genus, e.g. *Eucalyptus*
  species, e.g. *Eucalyptus caesia*
  subspecies or variety, e.g. *Eucalyptus caesia* subsp. *magna*

- In the text, family names may be set in roman or italic.

- Genus and species/subspecies/variety names are usually in italic.

[2] Reprinted with permission of *ANZSI Newsletter*.

- Species/subspecies/variety names always have a lower case first letter.

- Plants are almost never indexed by species name alone (unlike some zoological texts).

## Common (vernacular) names

Common names are of two kinds—general (e.g. wattle for all species of the genus *Acacia*) and specific i.e. used for a single species (e.g. Manna Wattle for *Acacia microbotrya*). They are always in roman. Use of capitals is optional for common names, unless a personal or place name is involved. I prefer lower case for general names and initial capitals for specific names. Examples: Elephant Ear Wattle (*Acacia dunnii*), Drummond's Wattle (*Acacia drummondii*), Cootamundra Wattle (*Acacia baileyana*).

## Authorities of plant names

Each scientific name has what is called an authority. This is the name of the person who gave it that name, and in scientific and many other works it is cited immediately after the name, e.g. *Acacia baileyana* F.Mueller. Thousands of people have named plants and, to save space, their names are commonly abbreviated, according to an internationally accepted list (Brummitt & Powell, 1992). Thus F.Mueller is F.Muell., Robert Brown is R.Br. They are always in roman. If used in the text it is optional whether to include them with a plant name when indexed, but it can be useful for the reader to include them. They are not indexed as personal names.

## Cultivar names

Cultivar names consist of a scientific name followed by another registered name. This is set in roman and enclosed in single quotation marks. It may be more than one word, and each has an upper case first letter unless linguistic custom determines otherwise. The abbreviations 'cv.' and 'var.' are not used with cultivar names. Thus:

*Banksia integrifolia* 'Roller Coaster'

or place the cultivar name as a subentry:

*Banksia integrifolia*
'Roller Coaster'

The multiplication sign ( × ) is not used for a cultivar of hybrid origin. It may be part of a scientific name of a plant considered a hybrid but not a cultivar, e.g. *Thymus* × *citriodorus*. In such a case it should be included in the index entry.

## Format

Generic names should set flush left and species indented without repeating the generic name. Species, subspecies and variety should be further indented. If there are varieties under a subspecies then indent again. e.g.

Dryandra
fraseri
*var.* ashbyi
*var.* fraseri
lindleyana
subsp. *agricola*
subsp. *lindleyana*
var. *lindleyana*
var. *mellicula*
subsp. *sylvestris*
*shuttleworthiana*

Reverse entries are worth including for many common names but are never used for scientific names. It may also be worth having separate entries for the 'cultivar' part of the name of a cultivar, since the reader may remember only that part of it. Thus:

*Banksia aculeata*
*integrifolia 'Roller Coaster'*
*Banksia, Swordfish*
*'Roller Coaster'*
*Swordfish Banksia*

Include a running head if the entries for a genus flow over to another column or page.

In works that contain both scientific and common names you will sometimes see separate indexes to each kind, and even a third index to other subjects. I find this practice inconvenient and strongly recommend a combined index. Common and scientific names are readily distinguished by their typeface.

If there is an introductory chapter(s) followed by a taxonomic or alphabetical treatment, index the former as well.

For multi-volume works a combined index is well worthwhile.

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# Behind the Scenes in Publishing in Nineteenth- and Early Twentieth-Century Australia

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***Abstract***

*With the exception of Angus & Robertson, part of whose archives went to the Mitchell Library in the 1930s, little is known about the inner workings of publishing houses in Australia before the First World War. Topics like copy-editing and indexing have been neglected, largely because of a dearth of surviving documentation. The paper proposes to outline the problems and to set out some of the ways in which this hidden side of publishing can be explored with the scattered resources at our disposal. The emphasis will fall on nineteenth-century Melbourne, which was in any case the centre of the trade between the gold rushes and Federation.*

In the A. H. Spencer Papers in the State Library of Victoria there are files relating to the publication of his memoirs, *The Hill of Content*, by Angus & Robertson in 1959.[1] Apart from letters from enthusiastic readers there is the correspondence with his editor, the celebrated and formidable Beatrice Davis. On Spencer's side it is often playful, on hers always businesslike and to the point. 'Dear Mr Spencer' … Those were more formal times. And quite different in other respects as well. Spencer wanted to thank his long-suffering editor in the preface, but this was not something she would countenance. Editors are not thanked, they are anonymous, hidden behind the imprint of the publishing house.[2] Beatrice Davis was a pioneer, the first notable example in this country of the professional – and ultimately recognized – editor. What she decreed half a century ago was the norm, so that very often we know little about what hands shaped the classic books we read from nineteenth- or early twentieth-century Australia. Nowadays, of course, editors of all kinds are routinely thanked … a two-edged sword insofar as we know who should be blamed for the egregious errors that litter so many books of the new millennium!

There is little danger that the editors of now will be lost in obscurity. After all we have Societies of Editors in the various States, registers of freelance operators and so forth. Even if few will

1. MS 12361, box 3169/5–7: letters to A. H. Spencer, 1958–1970, and box 3169/8: 2 letter books of A. H. Spencer, 14 May 1957 – 5 December 1960.
2. 'Much as I appreciated your reference to me in the acknowledgments, I felt I must take it out. Publishers never allow themselves or members of their staff to be praised by their authors. Thank you all the same.' (letter III, 10 of 11 March 1959 in 3169/5).

achieve a memoir and a full-dress biography like Beatrice Davis,[3] there are serious efforts to interview and to tape notable practitioners.[4] Acquaintance of a solid documentary kind with work methods and procedures is another matter. The electronic files of authors and editors pose enormous archival problems, and, stepping back a generation, it is doubtful whether we have adequate paper records of many of our publishing houses. Some have survived – they have monetary value in the eyes of collectors public and private – and authors are now much more inclined to realize what they can from their correspondence and from their manuscripts. As the recent case of Patrick White demonstrates, destruction can somehow be avoided.[5] If one is lucky, as happened with Beatrice Davis and Bert Spencer, himself a long-time former employee of Angus & Robertson, both sides of a correspondence will be preserved. More frequently the dialogue will be one-sided unless there are both inwards and outwards letter books. This is the noble end of an archive. How often, apart from writers like, say, Henry Lawson, do we have manuscripts marked up for the press, corrected proofs and all the more or less ephemeral things that flow through the publisher's office?

Thanks to the prescience of George Robertson (of Sydney) in the early 1930s and to the public spirit of the eventual heirs to the business after the Second World War we have a remarkable but by no means complete record of what A & R achieved in its heyday as the leading Australian publisher.[6] The bookselling, alas, is another matter. It is not necessary to dwell on something that has been well publicized: by Anthony Barker's selection of Robertson's letters,[7] by Ph.D. theses by Teresa Pagliaro,[8] Jennifer Alison[9] and Caroline Viera Jones,[10] by academic articles and so forth. Figures like Arthur Jose emerge from the shadows as essential to the editorial work of the firm in the early part of the century. We also see how academics and would-be academics were pressed into part-time service to read submitted manuscripts. Yet we must remember that even A & R in the post-1945 years was publisher, bookseller and printer, in other words combining activities that were once linked in the same houses in Europe and North America in earlier centuries, but long since split up. With very few and minor exceptions the Australian book world was firmly set in the Old Regime until the second half of the twentieth century. However, I have expressly excluded A & R from what I want to treat today in a highly schematic and tentative way. It is perhaps enough to commend to you one memoir covering a post-1920 A

3. Anthony Barker, *One of the First and One of the Finest: Beatrice Davis, Book Editor*, Carlton: The Society of Editors (Vic.) Inc., 1991, and Jacqueline Kent, *A Certain Style: Beatrice Davis, a Literary Life*, Ringwood: Viking, 2001.
4. See the forthcoming volume *Editors in Conversation*, Melbourne, Australian Scholarly Publications.
5. See Marie-Louise Ayres, 'My mss are destroyed', *Australian Book Review*, no. 290, April 2007, pp. 8–11.
6. See *Guide to the Angus & Robertson Archives in the Mitchell Library, State Library of New South Wales. Part 1*, Sydney: Library Council of New South Wales, 1990.
7. *Dear Robertson: Letters to an Australian Publisher*, Sydney: Angus & Robertson Publishers, 1982. A second edition was published as *George Robertson: a Publishing Life in Letters* by University of Queensland Press in 1993.
8. 'Arthur Wilberforce Jose (1863–1934): an Anglo-Australian', University of Sydney, 1990. See her articles 'The Publishing Fortunes of A. W. Jose's *The Growth of the Empire*', *The Bibliographical Society of Australia and New Zealand Bulletin*, 7, 1983, pp. 5–14; 'Jose's Editing of *While the Billy Boils*', *BSANZ Bulletin*, 14, 1990, pp. 81–93; 'A. W. Jose: Angus & Robertson Editor', *BSANZ Bulletin*, 15, 1991, pp. 11–19.
9. 'Angus and Robertson as Publishers, 1880–1900: a Business History', University of New South Wales, 1997. See her article 'Unsolicited Manuscripts Received by Angus and Robertson, 1896–1914', *BSANZ Bulletin*, 20, 1996, pp. 45–60.
10. 'Australian Imprint: the Influence of George Robertson on a National Narrative (1890–1935)', University of Sydney, 2004. See her 'A Scottish Imprint: George Robertson and *The Australian Encyclopaedia*' in John Hicks and Catherine Armstrong, eds, *Worlds of Print: Diversity in the Book Trade*, New Castle, Delaware: Oak Knoll Press; London: The British Library, 2006, pp. 127–133.

& R period: Enid Moon's *Memoirs of a Galley Slave: a Proof-Reader Looks Back.*[11] The voice of the proof-reader is too little heard in any part of the book world and therefore well worth careful attention.

Book-history research in the last half-century has turned to some of the back-stage players. In looking at publishers' readers it is almost *de rigueur* to begin by referring to Richard Hengist Horne's first book *Exposition of the False Medium and Barriers Excluding Men of Genius from the Public*,[12] with its thorough-going denunciation of the nefarious activities of the people who passed judgment on authors' work. The same Horne later spent the years 1852 to 1869 in Victoria, becoming an habitué of the circle of the leading Melbourne bookseller and publisher Henry Tolman Dwight.[13] Another English sojourner in Australia, William Stanley Jevons, who was in Sydney from 1854 to 1859, was coincidentally, according to Henry B. Wheatley, one of the early advocates in 1874 of 'the systematic cataloguing and indexing of masses of historical and scientific information, which are now almost closed against inquiry'.[14] But, whereas we have extensive studies of the readers' reports done for the London firms of John Murray[15] and Richard Bentley[16] and a growing body of work on the literary agents in the Northern Hemisphere who acted for Australian authors,[17] I am not aware of any detailed investigations of indexers in the nineteenth century. Could it be that the preparation of indexes was either done perfunctorily by firms' principals or farmed out to poorly paid and ultimately unnoticed casuals?

It is always rash to make pronouncements about Australia as a whole. None the less, and regardless of what began to happen in Western Australia in the 1890s or of what had been achieved in Queensland, it is incontrovertible that Melbourne was the centre of the Australian trade from the gold rushes virtually till Federation. To be sure, the crash of 1892 was a dreadful blow, but the implications of the crisis for Melbourne's primacy were not grasped immediately.[18] As a result the student of bookselling and publishing needs to know what can be discovered about Melbourne operations in this period.

The answer is somewhat dispiriting. The archives of Lothian, a firm that passed out of family control quite recently, are in the State Library of Victoria and have been examined in particular by Cecily Close.[19] Some important material relating to Cole's Book Arcade is held by a private collector. For Samuel Mullen and George Robertson (of Melbourne), the principal of George Robertson & Co. and the giant of the Melbourne trade, we have printed catalogues and

11. Studies in Australian Bibliography, no. 34: Sydney: Book Collectors' Society of Australia, 1991.
12. London: Effingham Wilson, 1833.
13. See Ian F. McLaren, *Henry Tolman Dwight: Bookseller and Publisher*, Parkville: The University of Melbourne Library, 1989.
14. *How to Make an Index*, London: Elliot Stock, 1902, p. 208.
15. See Angus Fraser, 'A Publishing House and Its Readers, 1841–1880: the Murrays and the Miltons', *The Papers of the Bibliographical Society of America*, 90, 1996, pp. 4–47.
16. See Royal A. Gettmann, *A Victorian Publisher: a Study of the Bentley Papers*, Cambridge: Cambridge University Press, 1960, and Linda Marie Fritschner, 'Publishers' Readers, Publishers and their Authors', *Publishing History*, no. 7, 1980, pp. 45–100.
17. See, for example, Elaine Zinkhan, 'Early British Publication of *While the Billy Boils*: the A. P. Watt Connection', *BSANZ Bulletin*, 21, 1997, pp. 165–182.
18. A number of general studies published in the last four decades play up Melbourne's central role. On the 1890s crash, see Wallace Kirsop, 'From Boom to Bust in the 'Chicago of the South': the 19th-Century Melbourne Book Trade', *La Trobe Library Journal*, no.59, Autumn 1997, pp. 1–14.
19. See her Ph.D. thesis 'The Publishing Activities of Thomas C. Lothian, 1905–1945', Monash University, 1988, and several articles developed from it over the last two decades.

advertising journals,[20] but hardly any archival evidence beyond what is in public repositories. There is an engaging pictorial biography of Cole by his grandson, the late Cole Turnley.[21] Ian McLaren produced a valuable and comprehensive bibliography of Dwight. John Holroyd strove valiantly to retell Robertson's story despite a dearth of business documents.[22] On Mullen there is no more than an article or two.[23] Yet these were the major players. Marie Cullen has written a Ph.D. about E. A. Petherick, Robertson's London Manager from 1870 to 1887 before going into business on his own account and crashing in the 1890s.[24] All of this is meagre, and particularly so if one wants to understand how these figures ran generally successful publishing businesses. Before the advent of A & R, G R & Co were far and away the most substantial publisher in the Australian colonies, which they dominated in any case through their wholesale importing activities. Given this situation we have to try to be resourceful. Here, clearly, I am outlining a programme for future research rather than results already obtained. UQP's *A History of the Book in Australia*[25] is not a rounded synthesis, but a call for labour to fill the many gaps.

With Ferguson's *Bibliography of Australia*,[26] Morris Miller,[27] Castles[28] and Ford[29] we have a reasonable bibliographical basis, supplemented by Ian Morrison's *Index* to the printers and publishers listed by Ferguson[30] and by a series of specialist bibliographies of almanacs,[31] directories,[32] cookery books[33] and all the rest. Lurline Stuart's bibliography of magazines and journals,[34] as well as the union lists of newspapers can stand as indispensable keys to what was being done here in the nineteenth century. Once we understand this, we can gauge the role of

20. A comprehensive listing of this material, held chiefly in the State Library of Victoria and in the National Library of Australia, has yet to be done.
21. *Cole of the Book Arcade: a Pictorial Biography of E. W. Cole*, Hawthorn, Victoria: Cole Publications, 1974.
22. *George Robertson of Melbourne 1825–1898: Pioneer Bookseller & Publisher*, Melbourne: Robertson & Mullens, 1968.
23. See J. P. Holroyd's article in the *Australian Dictionary of Biography*, 5, pp. 309–310, and Wallace Kirsop, 'From Curry's to Collins Street, or How a Dubliner Became the 'Melbourne Mudie'' in Peter Isaac and Barry McKay, eds, *The Moving Market: Continuity and Change in the Book Trade*, New Castle, Delaware: Oak Knoll Press, 2001, pp. 83–92.
24. 'Edward Augustus Petherick: a Bio-bibliographical Study to August 1887', Monash University, 2000.
25. Volume 2, edited by Martyn Lyons & John Arnold, covering the years 1891–1945 and subtitled *A National Culture in a Colonised Market*, appeared in 2001. Volume 3, edited by Craig Munro & Robyn Sheahan-Bright and entitled *Paper Empires: a History of the Book in Australia 1946–2005*, was published in 2006. Volume 1, which tells the story to 1890, is scheduled for late 2007.
26. To the seven volumes of the original Angus & Robertson edition (1941–1969) one has to join the *Addenda 1784–1850 (Volumes I to IV)*, Canberra: National Library of Australia, 1986.
27. *Australian Literature from its Beginnings to 1935*, Melbourne: Melbourne University Press, 1940, 2 vols.
28. Alex C. Castles, *Annotated Bibliography of Printed Materials on Australian Law 1788–1900*, Sydney: The Law Book Company Limited, 1994.
29. Edward Ford, *Bibliography of Australian Medicine 1790–1900*, Sydney: Sydney University Press, 1976.
30. *The Publishing Industry in Colonial Australia: a Name Index to John Alexander Ferguson's* Bibliography of Australia 1784–1900, Melbourne: Bibliographical Society of Australia and New Zealand, 1996.
31. *Australian Almanacs 1806–1930: a Bibliography*, compiled by Ian Morrison, Maureen Perkins and Tracey Caulfield, Hawthorn East, Victoria: Quiddlers Press, 2003.
32. Margot Hyslop, *Victorian Directories, 1836–1974: a Checklist* (with Carole Beaumont, *Local History in Victoria*), Bundoora: La Trobe University Library, 1980; Joy Hughes, *New South Wales Directories 1828–1950: a Bibliography* (with Christine Eslich, Joy Hughes and R. Ian Jack, *Bibliography of New South Wales Local History: an Annotated Bibliography of Secondary Works Published Before 1982*), Kensington, NSW: New South Wales University Press, 1987.
33. Bette R. Austin, *A Bibliography of Australian Cookery Books Published Prior to 1941*, Melbourne: RMIT, 1987.
34. *Australian Periodicals with Literary Content 1821–1925: an Annotated Bibliography*, Melbourne: Australian Scholarly Publishing, 2003.

hidden professionals in making the whole enterprise work.

First then we have to have some basic facts. Until the second half of the twentieth century an overwhelming proportion – 80%? 85%? – of *books* bought in Australia came from overseas. Even now Britain and the United States remain major sources, a state of affairs that it is useless to deplore. We are a smallish part of a very large Anglophone community, and our heritage is much wider than this continent. On the other hand, we buy and read preponderantly newspapers and magazines produced locally, and this was, if possible, even more the case in the nineteenth century. Unless one was a journalist, one did not live by one's pen in nineteenth-century Australia. Many authors were exploiting their monied leisure or their spare time. The rest were scratching for casual employment.

What was being published? Almost everywhere – including Victoria, if one thinks of Collins's press on the beach at Sorrento in 1803[35] – government printers were first on the job. For two or three decades this was modest enough, but by the end of the century the official press was extremely busy. Hansard and parliamentary papers for the colonial legislatures, reports of all kinds and sports like the 1580 pages of George Alfred Tucker's *Lunacy in Many Lands* of 1887[36] were being competently and professionally produced. These were no Bodonis, Baskervilles or Didots, but their tradesmanlike work assumed and displayed the requisite editorial and indexing skills. Who were the workmen? What do the surviving official records tell us about them?

The rough-and-ready products of the early colonial press give no inkling of the standard reached in the newspapers of the end of the century. A recent obligation to read through the *Australasian* for 1888 has revealed how remarkable this weekly companion to the *Argus* was. With its serialized novels, its substantial reviews, even of books in foreign languages as supplied by Mullen, its myriad regular features and its good and uncompromising writing, it demonstrates the high level of civilization attained in colonial Melbourne, a fact commented on by more than one visitor.[37] If one thinks of all the metropolitan dailies with their attendant weeklies and of the suburban and provincial press one recognizes the competence that had to be mobilized. Journalists, like printing workers, moved around: out from Britain, but also into and out of neighbouring colonies. The occupational tables of the *Dictionary of Australian Biography* show how many trained immigrants there were to do the necessary work.

It is notorious that most nineteenth-century Australian periodicals failed, and often quite quickly.[38] However, there were exceptions, and the sector continued to provide work for journalists and writers. Once again editorial skills and organizing capacity were called for.

Belles-lettres and such genres played a smaller role than a century later, but they were not absent from the major houses' lists. They were, of course, quite distinct from the rebadged British series sold by Robertson, Cole and others with Australian title-pages garnishing sheets printed on the other side of the world. Genuine local publications required editing and indexing if that was appropriate. What is not clear to us now is how much vanity publishing there was. There is a

35. See *Garrison and General Orders Sullivan Bay 16 October 1803*, Clayton: Ancora Press, Monash University, 2003.
36. Ferguson number 17378. See Ford, *Bibliography of Australian Medicine*, pp. 287–288.
37. See Anthony Trollope, *Victoria and Tasmania*, new edition, London, Chapman and Hall, 1875, p. 107, and – specifically about newspapers – the report of an interview with Sidney Webb in 1898 reproduced in *The Webbs' Australian Diary 1898*, ed. A. G. Austin, Melbourne: Pitman, 1965, pp. 113–115.
38. See Lurline Stuart, 'Colonial Periodicals: Patterns of Failure', *BSANZ Bulletin*, 13, 1989, pp. 1–10.

strong possibility that authors who were paying to be published or distributed were also expected to furnish all the help needed to get their books through the press. Even today authors can expect to be asked to do their own indexing – even of chapters, as I have discovered recently in dealing with French publishers – not to mention things like the provision of camera-ready copy and large subsidies. The accountants in Canberra do not seem to be aware of the very thin line between commercial and vanity publishing. In some ways we are returning to the nineteenth century.

Authors could be skilled in these matters. One Benjamin Suggitt Nayler, who issued more than a dozen pamphlets as well as a book on English pronunciation during the decade – 1865–1875 – he spent in Victoria, almost certainly financed all his publications. They bear the strong impress of his idiosyncratic style down to their layout and to the index provided for the linguistic book in 1869. Nayler, an elderly Englishman, had been a publisher in The Netherlands between 1820 and 1848. His correspondence shows that he was being helped in his business by Dutch writers in addition to the work he and his wife were doing themselves.[39] These were common patterns for the period, and, given what we know of the activity of the George Robertson of A & R, we can wonder whether his Melbourne namesake, a bookseller in Dublin before his gold rush arrival in the colony, was not doing something similar. Like Cole with his inimitable scissors-and-paste books, Robertson must have had help from his staff. But the absent business records do not help us …

Colonial publishing had inevitably a bread-and-butter character. It did not eschew textbooks – despite the cherished legend that everything was cast in a British mould –, but the authors working with Mullen and others were expected to prepare their copy properly – and to guarantee that their teaching institutions would prescribe the books! Occasional surviving documents give us glimpses of practices we could view as somewhat suspect.[40] But, more important in the overall scheme of things were the almanacs and directories that became staples from early in the nineteenth century. In the 1870s the London organ *The Publishers' Circular* commented, in reviewing or rather noticing a colonial directory, that this was an area of publishing in which the outposts of Empire excelled.[41] One has only to consult the various examples that have been reprinted in facsimile to note the organizational flair required to bring off these eminently practical up-to-date guides. The recent bibliography of almanacs by Ian Morrison, Maureen Perkins and Tracey Caulfield, after earlier listings of Victorian and New South Wales directories, gives us some idea of the extent of the phenomenon.

The names of the publishers and booksellers responsible for these useful works are well in evidence – Dowling, Walch, Baker and all the rest –, but the people who did the compilation and the arrangement often remain obscure. What do we know of James Wood, absent from *ADB*, effective author at mid-century of a series of volumes for Van Diemen's Land?[42] Others are better attested, for example Robert Whitworth,[43] who did gazetteers for F. F. Baillière, the Australian representative of an Anglo-French medical and scientific publishing dynasty in the 1860s and 1870s.[44] These are the marginal figures of nineteenth-century Australian high

39. See Wallace Kirsop, 'Life Before and After Bookselling: the Curious Career of Benjamin Suggitt Nayler', *The La Trobe Journal*, no. 78, Spring 2006, pp. 11–37.
40. See a memorandum of agreement between C. H. Pearson, H. A. Strong and Mullen concerning the publication in 1876 of an English Grammar, State Library of Victoria: Box 436/5, MS 7168.
41. *Publishers' Circular*, 16 April 1875, p. 278.
42. See *Australian Almanacs 1806–1930*, pp. 80, 82–83.
43. See the article on him in the *Australian Dictionary of Biography*, 6, p. 395.
44. See Laurel Clark, *F. F. Baillière, Publisher in Ordinary: Publisher Extraordinary*, Canberra: Mulini Press, 2004, and Laurel Clark, 'Le Baillière des antipodes' in Danielle Gourevitch & Jean-François Vincent, eds,

literature, sometimes Bohemians, but in any case denizens of our version of Grub Street. The range of possible work extended to printed catalogues of libraries in this age before card files, to booksellers' lists and to the flimsy pamphlets got ready for auctions of all kinds. Many publications falling into the latter categories have perished as ephemera. The auction catalogue of the impecunious B. S. Nayler's library in 1870 survives in at least three copies, but he for one prepared it with professional flair and know-how. Most of the others were perfunctorily got together by unpractised hands. In the end many people were not willing to pay for order and accuracy. It is clear that Nayler had some part in the catalogues of the spiritualist bookseller William Terry.[45] Tracking casual and contract labour then as now poses all sorts of difficulties. Ultimately any picture we can build up of these activities will depend on a variety of scattered and anecdotal sources – diaries and letters, notably.

Australia's boom years of the 1880s saw some quite grandiose book-trade speculations, in particular the *Picturesque Atlas of Australasia*.[46] Such enterprises following the model of the subscription editions associated with Hartford, Connecticut[47] were, of course, contentious at the time, not least for the regular book trade, which was suspicious of door-to-door selling.[48] However, resources and people were mobilized to produce these books, and we come closer to the corporate culture of the next century.

Any conclusion has to be modest. Outside the newspaper world Australian publishing was small. It was therefore possible for the larger players to do much of the work in house. Thinking of what can be achieved in a modern academic's time free from teaching and research it is not absurd to imagine a firm's principal doing a great deal himself (a gender restriction that corresponds to nineteenth-century realities) with the help of one or two amanuenses. Self-help was a critical resource. The publisher's back room merges in this perspective with the author's study.

*J.-B. Baillière et fils, éditeurs de médecine*, Paris: Editions De Boccard, 2006, pp. 157–174.

45. Quite certainly in *Catalogue of English and American Books, Obtainable at W. H. Terry's Book Depot, 96 Russell Street, Melbourne*, Melbourne: R. Bell, Steam Printer, 1869.

46. See Tony Hughes-d'Aeth, *Paper Nation: the Story of the* Picturesque Atlas of Australasia *1886–1888*, Melbourne: Melbourne University Press, 2001.

47. See Michael Hackenberg, 'The Subscription Publishing Network in Nineteenth-Century America' in Michael Hackenberg, ed., *Getting the Books Out: Papers of the Chicago Conference on the Book in 19th-Century America*, Washington: The Center for the Book, Library of Congress, 1987, pp. 45–75, and Amy M. Thomas, ''There is Nothing So Effective as a Personal Canvass': Revaluing Nineteenth-Century American Subscription Books', *Book History*, 1, 1998, pp. 140–155.

48. See, for example, *S. Mullen's Monthly Circular of Literature, &c.*, n° 18, June 1885, pp. 3–4: 'A Word of Warning to the Unwary' – 'Those who have lived for about a quarter of a century in Victoria know something of the history of what are known popularly as 'American Book Swindles,' begun by a work entitled *America Illustrated*, and continued by others of a like kind too numerous to detail.'

# Bibliography in a digital age

**Geraldine Triffitt**

***Abstract***

OZBIB: a Linguistic Bibliography of Aboriginal Australia and the Torres Strait Islands*, compiled by Lois Carrington and Geraldine Triffitt, was originally published by Pacific Linguistics, Australian National University in 1999. Its basis was the combining of a number of published bibliographies and the library catalogue of the Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS). Additional entries were sorted by contacting authors directly, sending them copies of their entries and asking for additional items or amendments. This personal touch, facilitated by emails and personal websites, was used even more in the supplement to OZBIB prepared in 2005-2006 for the AUSTLANG database which AIATSIS will mount on their website. OZBIB will provide the bibliographical structure behind the language database.*

Collison in the Introduction to his *Bibliographies: Subject and National* (1969) wrote:

> There is something very satisfying in handling a well-constructed bibliography: …the finished product, if good, reads so easily that few give thought to the arduous and exacting nature of the task that confronts every bibliographer anew.

Bibliographies are reference works, compiled to enable a researcher to find information on a topic. They must therefore be cited accurately, so that the item can be found in a library, web address or so on. A bibliography is a two-step process. The researcher finds the reference and wants the full text. In this digital age, the citation may be linked to the full text if copyright permits it. A bibliography published on the Internet can be downloaded, modified, shared with others or loaded directly into a publication. This of course has implications for the rights of the compiler to control access to his work through copyright.

Bibliographies are ongoing although they are out-of-date the moment they are written. There must be provision for updating or they will quickly become useless. This may mean that authors will directly post their citations on the Web. If this is going into an already compiled bibliography on the Web, there may indeed be questions of the moral rights of the original compiler.

These questions have surfaced because I have recently had published in hard copy the Supplement to OZBIB: a linguistic bibliography of Aboriginal Australia and the Torres Strait Islands. The original, compiled by Lois Carrington and myself, published in 1999, the

supplement and future contributed works, will end up as a bibliographical database on the Web.

The compilation of bibliographies has changed radically since the advent of computers. This has raised for me some question of rights which I wish to address in this paper using the OZBIB project as the case study looking at hypothetical rights issues. My original paper planned for this conference was along different lines but I changed it thanks to my records manager/librarian son, Iain, who drew my attention to the problems of author's rights in a digital environment. I would like to thank Ian McDonald, Senior Legal Officer at the Copyright Council, Moyra McAllister, Copyright Officer for the Australian Library and Information Association for their advice and help, and Glenda Browne and Jon Jermey for their comments.

I will consider copyright and the Web and the more specific issues of moral rights, new copyright law and the Free-Trade Agreement with the United States, creative common and digital rights management as to how compilations such as bibliographies and indexes can be affected. Is there still a place for published hard copy bibliographies when the whole text can be found through a link on the Web and downloaded into a personal computer? Copying is so easy, and so difficult to police through copyright law.

## Old style bibliography

I have been a hunter and gatherer of bibliographical items for many years. My tools were an endless supply of 5 by 3 spoiled catalogue cards which I would even take on holidays in case the local library revealed some treasured unusual item.

It was the beginning of the electronic age. Computers were beginning to appear in large air-conditioned rooms in offices and libraries. As a research worker my first experiences were with punched cards that could be sorted using a knitting needle. When I joined the National Library as an APAIS indexer, I was introduced to flexowriter tape, and Magnetic cards. Then came automated catalogues telecommunications, and more sophisticated methods of information retrieval.

It was then that I began to realise that my cottage industry of typing bibliographies from 5 by 3 cards may be at an end. A computer could search for authors and subjects, sort records and print them out automatically. What would be the future of a bibliographer?.

In 1986 I joined the staff of the Australian Institute of Aboriginal Studies (AIAS) with the title of Bibliographer specialising in linguistics. I annotated and coded Australian Aboriginal language material according to the Institute's subject and language classifications for the card catalogues. As an adjunct to my job I prepared a bibliography of recent linguistic materials annually for the Australian Journal of Linguistics, the journal of the Australian Linguistic Society listing new acquisitions at AIAS (later AIATSIS Australian Institute of Aboriginal and Torres Strait Islander Studies) and the Australian National University libraries.

## OZBIB

On my retirement 11 years later, I used these bibliographies and others that had been prepared as a basis for OZBIB. This was the whimsical title given by my co-compiler Lois Carrington. We wanted a comprehensive bibliography of all that had been published about Aboriginal and Torres Strait Islander languages up to that time. Works solely in language, audio visual material, and manuscripts except for theses were excluded.. A virtual library of linguistic items covered material in electronic form, so that was also excluded. In any case we felt that Internet material could be transient and not easily traceable if the Internet Provider changed or links disappeared. However we did give brief details about authors, so they could be traced.

The basis of the bibliography was the extraction of linguistic entries from Greenway's Bibliography of the Australian Aborigines and the native peoples of Torres Strait to 1959, other bibliographies published by Pacific Linguistics and the AIATSIS catalogues Lois typed the bibliography in Word as most of the cannibalised bibliographies were in that format. This was an unfortunate decision, particularly when it came to compiling indexes. It would have been so much easier in a database format.

We then caught up with the electronic age by emailing and snail mailing those linguists for whom we had addresses in order for them to check our entries for them. They would give us additional items and often said "I had forgotten about that publication." In this way we had one-to-one contact with the authors in our bibliography.

Rupert Simms, who experienced many problems in compiling his *Bibliotheca Staffordiensis*, wrote in 1894

> The Work is not free from errors: it is not complete or perfect, either as to text or particulars. … These errors and omissions are the result of want of information and not intentional. The Work is as perfect and as correct as one man can make it by hard work and continued application.

This sums up how we felt after compiling OZBIB.

Our book was published in 1999 after both Lois and I had spent over 12 months compiling, checking, and finding new entries. Pacific Linguistics published it in their series and distributed it largely to libraries which had a standing order for the series. We were given 3 copies each instead of royalties. There were complaints from linguists about it being in Word and not available in a form that could be downloaded from the Internet.

## OZBIB and copyright

Although we were the nominal copyright holders the agreement we signed was that Pacific Linguistics had the rights over the content for five years and then full copyright reverted to us and we could publish in another form. A large survey of languages took place in 2001 and permission was given to the researchers to have access to the bibliography to convert the Word file to Endnote so that it could be searched as a database. This was done and about 90% of the bibliography was successfully converted.

When Lois and I claimed copyright in 2004 we asked Pacific Linguistics to do a second edition and bring the information up to date. They were not keen to do this, so we sold the copyright to AIATSIS who had the Endnote copy and wanted the bibliography as a basis for their Web Indigenous Database (WILD) later called AUSTLANG. They employed me for three months to update the bibliography. I was still collecting items when the three months finished, and it was apparent that the AUSTLANG project would not be fully operational for some time. Again I consulted bibliographies, but increasingly I emailed linguists and asked for lists of their publications and works in progress. The hunter-gatherer in me sought the foreign and more unattainable material. I have not yet been asked how to obtain it, but there could easily be access problems.

I sought permission from AIATSIS to publish a hard copy bibliography and after some discussion, it was agreed on condition that it was a once off. A friend agreed to publish the supplement as a limited edition if I distributed it. I paid the costs and the book was published in November 2006 with items up to September 2006. I am now trying to sell enough copies to recoup my expenses. It costs money to sell things, I have discovered.

I kept the format and style that Lois had devised. The indexes were a bit different. AIATSIS had published a language thesaurus and I used that in the language index, and expanded the topics in the subject index. I did not give details of authors, not even their email addresses, which may have been a mistake.

Why did I want to produce the book in hard copy? I felt that a book was more use in the outback where computer access might be restricted, some linguists did not like to use the computer, a book was a permanent record whereas an electronic file could disappear without trace and also was dependent on appropriate hardware and software. I also wanted recognition for my work.

I now have a practical problem to solve. The original OZBIB is out-of-print. Do I send the enquirer to the publisher or the copyright holder? As far as I now there are no contractual arrangements between Pacific Linguistics and AIATSIS. I asked the Copyright Council and they suggested contacting the copyright holder first who could contact then Pacific Linguistics who hold the masters.

## Copyright laws

A bibliography is derivative. The linguists wanted our work in electronic form so they could download it and place it in their own bibliography. What are the copyright issues involved? Does the compiler have any copyright? Bibliographies and indexes come within the scope of compilations, which are literary works under the Copyright Act. Compilers of bibliographies and indexes have copyright over a work

> in which copyright subsists as a result of skill and labour of the author in the creation of that work. (Australian Copyright Council G010)

That means that there is copyright in the selection of entries, format, indexes created, annotations and arrangement of the bibliography. Infringement of copyright is tested in courts and I have not found evidence of a case involving bibliographies or indexes. However there have been cases concerning the compilation of directories and stock catalogues.

Copyright strives for balance between protecting the rights of the creator and allowing access to users through fair dealing provisions or licences. Users were allowed to copy copyright material without the permission of the copyright holder for research and study, criticism and review, satires and parody, reporting news or professional advice by lawyers, patents or trade marks attorneys. There are special provisions for libraries, educational institutions and governments and annual licences allowing use of material for specific purposes without requiring permission each time.

Gerdsen wrote:

> An individual entry in a bibliography is insufficient to meet the requirements for protection under copyright law: Where an institution requires a copy of a particular bibliography, it would be prudent to seek the permission of the publisher where this bibliography is substantial. A short extract from an index may be copied where this represents an insubstantial portion of the work. Alternatively, licence provisions for educational institutions may apply to the making of a copy from an index or bibliography as part of a work in print or electronic form.

How much of a bibliography or index can be copied under the fair dealing provisions?

Australian Copyright law was affected by the Free Trade Agreement with United States. This has a bearing on the fair dealing provisions and the special case exceptions for libraries, archives and educational institutions. The *Copyright Amendment Act* 2006 is particularly concerned with copying of audiovisual and digital media. Basically it allows more recording of TV, radio and music, and copying of material from one format to another for private and domestic use in line with United States. Under the Act there is more extensive protection for technical protection measures (TPM) which are used by copyright owners to prevent unauthorised access to copyright content or unauthorised use of copyright content for both digital and non-digital material.

## Digital rights management

TPM is one aspect of Digital Rights Management (DRM) an umbrella term that refers to any of several technologies used by publishers or copyright owners to control access to and usage of digital data or hardware, and to restrictions associated with a specific instance of a digital work or device. (Wikipedia, 2 March 2007) It is technology created primarily for the music and film industries which monitor and control a computer user's behaviour through software and hardware. Digital Rights Management is a very contentious issue. There are various forms already in existence, some examples are I-Tunes Library where the purchased music files are encoded in AAC format exclusively compatible with Apple products, some e-book producers have embedded codes preventing copying and the British Library used it for its secure electronic delivery service to permit worldwide access to rare documents. (Wikipedia).

Advocates for DRM argue that it is necessary for copyright holders to prevent unauthorized duplication of their work to ensure continued revenue streams. The advent of personal computers, the ease of ripping media files from a CD or radio broadcast, combined with the Internet and popular file sharing tools have made unauthorized sharing of digital files easy and increased the worries of the copyrighted content providers.

Opponents say it restricts individual's use of their own copies of digitally published works and their rights to publish in a different format. Eventually it could destroy fair use and commons as every interaction with a published work is turned into a transaction. Presently copyright has a time limit after which content comes into public domain. DRM systems are not time limited, and the copy control systems can not be removed after the copyright term expires. Copyright law does not restrict resale of copyrighted works, or copying for fair dealing but DRM technology restricts or prevents the purchaser of copyrighted material from exercising their legal rights.

I cannot see at the moment that DRM will have any impact on OZBIB online because it is a tool for use by the big players where money transactions are involved. I mention this as a development that needs to be carefully monitored.

There is still the hypothetical question, how does AIATSIS restrict someone downloading a database like AUSTLANG or OZBIB and selling it? Moyra believes that it should be possible for AIATSIS to use DRM or TPMs to prevent copying or downloading. The circumvention of such measures for commercial purposes is now a criminal offence under the new *Copyright Amendment Act 2006*.

## Here is an interesting sidelight

In my course of publicising the Supplement, I contacted a German professor who has had a large bibliography on language in Australia, particularly English and its varieties such as Aboriginal English or migrant English, published by a major German publisher. He updates the bibliography on the Web with an online database called AUSBIB. It will be confusing having two databases with the same sound, although spelt differently. Does AIATSIS have any redress against his using this name? (Incidentally he did not list the original OZBIB in his bibliography, although he has promised to list the supplement). Moyra says this is really a Trademark Law question , and using words with similar pronunciation may be a breach of that law. Of course there is also the international aspect of it.

The professor suggested that the two databases be combined into the one Web database. I explained it was not mine to be able to do that. However, I pondered over what would be the copyright situation if AIATSIS agreed to download OZBIB into AUSBIB. It is unlikely to happen because the two databases serve different interest groups. Moyra's comment was that this would be thrashed out in a contract between the two bodies, which may be a shared copyright.

As mentioned above, currency is a factor in the usefulness of a bibliography. To cater for publications I knew were in the pipeline I compiled a database of items in process which I gave to AIATSIS for the AUSTLANG project As part of AUSTLANG it is planned to allow authors to mount the bibliographical details of their works on to the OZBIB database in order to keep it current. This is where the moral rights issue appears.

## Moral rights

Moral rights refer to the non-economic or personal rights of the author in a work. They refer principally to the rights of the author to be attributed (named) and acknowledged as the

author, not to be falsely attributed in an altered version of the work, and to enjoy integrity of authorship in the work." (Gerdsen (2003): 289)

Australia lagged behind in moral rights legislation. It was slow to comply with the requirements under the Berne Convention for the Protection of Literary and Artistic Works (the Berne Convention). Copyright law provided insufficient protection against breaches such as the unauthorised use of Indigenous art works for T shirts or carpets and infractions in the radio, film and newspaper industries.

Universities showed little interest in moral rights issues. They had their own set of rules and procedures to regulate attribution, authorship and integrity (Wiseman, 2005: 99). This may well change because increasingly academic authors are relinquishing copyright in the works that they create to publishers who may repackage work to suit the student market (Wiseman: 104). Also academic publications, particularly teaching materials, are being seen as potential sources of revenue in cash-strapped universities who may want to assert their ownership.

The *Copyright Amendment (Moral Rights) Act* 2000 brought Australia into line with the Berne Convention. Under the legislation moral rights are granted to the author for life plus 50 years. They remain with the author even if the copyright in the work has been licensed or assigned to another party. (Gerdsen: 289)

## What were the implications of moral rights for OZBIB online?

Lois and I wanted recognition for the many months of pro bono work we had given to the project. So the attribution clauses were important for us. It has often been said to us, that no one else would have undertaken such a project without a grant, and grants are few and far between for this type of work.

There could be a possibility of integrity issues relating to unedited items added to the database as proposed in the AUSTLANG project. If standards slipped and our names were given as compilers maybe this might affect our reputations. This is extremely unlikely but it is a rights issue of which authors should be aware.

It would appear that there is no problem in recognising our moral rights as far as attribution is concerned even if we have sold the copyright in the OZBIB project to AIATSIS. Claiming derogatory treatment or loss of reputation would be extremely difficult.

There are different ways of controlling material on websites. The American Society of Indexers will only post material cleared for copyright. Their Web Site policy states:

> We do not post copyrighted articles without the express permission of the copyright owners. The content of this site is copyrighted.

## Creative Commons

A way round the dilemma of controlling content on the Web has been the development of Creative Commons. That is a solution for people like me who would like the work widely distributed, but not downloaded without permission for someone else's profit.

Creative Commons is a new system, built within current copyright law that allows you to share your creations with others. This is an excellent way for peer production such as the contributed bibliography for AUSTLANG.

Creative Commons is an Open Content Licensing (OCL) project which provides free tools that let authors, scientists, artists, and educators easily mark their creative work with the freedoms they want it to carry. You can use CC to change your copyright terms from "All Rights Reserved" to "Some Rights Reserved." (www.creativecommons.com)

Based on easy-to-use licences that have low transaction costs, Creative Commons can be employed by anyone by just clicking a button. The licence provides that anyone can use the content subject to one or more conditions.

- Attribution of the author.
- Non-commercial distribution.
- That no derivative materials based on the licensed material are made and that all copies are verbatim.
- Share and share alike.

Creative Commons is a not-for-profit corporation which started in 2001 at Stanford University Law School but it extends internationally. In 2004 Queensland University of Technology became the Australian institutional affiliate for the project and Australian lawyers have worked on Australian licences to conform with our Copyright law.

It is expected that Creative Commons will provide creators and educators with a new dimension for negotiating digital content. In particular, government and other public-funded bodies may find Creative Commons an effective way of distributing digital content to the public while still retaining copyright. Instead of reserving all rights to the control of the copyright owner, the Creative Commons model provides a midway point between full copyright control and digital anarchy by reserving some rights to the copyright owner. (Fitzgerald and OI, Copyright Reporter 2005).

The movement has raised awareness of intellectual property rights in the digital online environment. (Fitzgerald, OI, Tzimas). In a world where the digitally minded feed off a culture of cut and paste, remix and instant internet access, creative commons will provide a vitally important facility for sharing knowledge in the name of culture and innovation.

## Conclusion

The digital environment has brought about endless opportunities to copy, download material which someone else has created. This can be modified and posted on the Web under a different name and the resulting mess of copyright and moral rights issues, has fostered new relationships between the copyright holder and the user. It is a long way from my drawer of 5 by 3 cards to posting bibliographies on the Web which can be linked to full text. Anyone in the world can have access to the bibliography, can add items, or modify others.

I hope I have given you some idea of the complexities of compiling material in this digital age, and the practical and legal solutions to recognizing authorship, and keeping control over the use of material.

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# Indexing theatre programmes

**Dennis Bryans**


## Abstract

*Finding useful biographical profiles, portraits and stories of theatrical performers, managers and technical support staff is not an easy task. Information in monographs about The Theatre is usually defined in broad categories such as 'Australian Theatre' or 'The World of Ballet' or is confined by the author to a biographical study of a suitably famous performer and their known associates. The need for a bibliography of theatre programmes arose from the intrusion of some theatrical items into a bibliography of more than 800 books printed or published by The Specialty Press during more than 70 years in business. As the firm printed programmes for J.C. Williamson in Melbourne for more than 50 years it became a case of either exclude them all (or all except Souvenir Programmes) or compile a separate listing. In choosing the latter course an alphabetical list of productions was embarked upon. The questions about how to proceed arose. Theatre programmes take many forms: booklets, magazines, flyers, folded leaflets and posters. All contain portraits and brief stories about the performers. Many carry illustrated advertisements for well-known sponsors and casts can change during the season of a play, opera or musical.*


I remember reading in a magazine more than 30 years ago that if a farmer, an engineer and an artist were to stand together looking at a field they would all see something different. This is not unlike the way readers view bibliography and indexing.

In blissful ignorance I tackled bibliography with the naive confidence of a neophyte. I'd used bibliographies and indexes often enough, to find new sources or random references to people and events. A simple alphabetical list wasn't enough to satisfy me, so I arranged all of the books I located for my project, *A History of The Specialty Press* arranged in date order alphabetically. This allowed me to count the number of books printed by the firm each year and to create a time line. I told myself it gave a backbone to the story.

Then on my computer I found that by searching the bibliography for different publishers I could create a date range for any series of books printed for them. At this point I began to have doubts.

But what was I to do about the books that didn't have a definite date of publication? The simple solution seemed to be to assign them to a decade – problem solved. Now the question

became what did that do to the data? I was faced with a choice: I could either ignore the undated books, not counting them, or I could distribute them across the decades. The former solution seemed more elegant. Then I began to wonder about publishing an unorthodox date order bibliography; would it annoy the reader to have to check each decade to find a title? Well they could go to the index first and look up the title they wanted.

On the other hand it might be easier to recast the bibliography as a simple alphabetical list for publication when I'd exploited the possibilities of my version.

Till then my interest in the subject was bordering on indifference. I'd enjoyed the thrill of the chase in finding over 850 books in libraries and second-hand bookshops. This included one or two theatre programmes I found in library catalogues. Then I discovered that the Performing Arts Centre in Melbourne held an alphabetically indexed list of J.C. Williamson programmes. What could be simpler than going through these to extract the items that were printed by The Specialty Press?

So I began listing every item, noting the date of the theatre production, and looking for the date at which The Specialty press began printing them. I knew that they began printing theatre programmes for Hugh J. Ward and Benjamin Fuller during the 1920s and after a few false starts I narrowed the date range to 1923–1974 – just over 50 years.

I continued to list everything, but skipped all items clearly outside the date range and concentrating on the content of those relevant.

I discovered that theatre programmes took many forms: souvenir programmes (either identified as such or created for a specific production) as distinct from general magazine programmes (those regularly printed for one theatre, and later on for several on a nightly, weekly or monthly basis), as well as flyers, folded leaflets and special inserts. Almost all contained portraits and brief stories about the performers. Many carried illustrated advertisements and cast lists and venues that sometimes altered during the season of the play, opera or musical.

## Indexing theatre programmes

An index became vital and it is the structure of this index that is the subject of my paper. I began with a formal structure reduced to the following categories:

1. A programme (the physical object)
2. Contents or playbill
3. Articles, theatre notes and profiles
4. Portraits
5. Advertisements

Each programme was given a number. Each number referred to an alphabetically listed production and the dates of the performances. The size, number of pages and a description of

the cover design was added, with, where known, the name of the commercial artist who created it.

You will notice that there is no attempt to list the cast in this hierarchy. The reason why 'Cast' was excluded is because (apart from the lead performers) it would reduce the bibliography to a long and tedious list of names. Should a reader need a cast list, then the obvious place to look for it is in the programme itself or in the press. Newspaper advertising can be found by reference to the production dates. Furthermore, items 3 (articles theatre notes and profiles) and 4 (Portraits) in most instances form between them a de facto cast list in the body of the programme.

Under 1, programme, each production falls into a definite category: such as concerts; Entertainments and spectacles; Grand Opera; Musicals and Operettas; Plays, and Revues.

Consequently 'Performer' was preferred to actor to describe cast members – ranging, if not from A to Z, at least from acrobats to xylophonists.

Narrower indexing distinctions are sometimes made: Percy Grainger, for example, is adequately identified by the label 'performer' but could equally have appeared under the separate heading of composer. George Bernard Shaw, on the other hand, is best classed as a playwright. And as playwrights appear more frequently than composers, playwrights get a place in the index under a separate heading.

Under articles theatre notes and profiles, programmes contain: articles by specific authors; biographical profiles of performers; storylines and commentaries on productions; background and general interest pieces and Testimonials. Under Portraits, there are: performers; companies; authors and playwrights; producers, entrepreneurs, directors and choreographers. These are represented either by: photographs; accompanied sometimes by a named photographer or studio; caricatures and illustrations

## Advertisements

With advertisements new problems arose. Many firms advertised regularly. Take for example the Melbourne confectioner Macpherson Robertson. MacRobertson's, like Alfred Nott the optometrist, and the City Motor Service (chauffeured limousines) Barnett Glass Tyres, and King George IV Whisky – advertised continuously – some for the entire period and beyond.

With advertisements the following sub-categories apply: The advertiser and the product – for example MacRobertson's Max Mints (with a date range). The artist or illustrator: for example Frank Elsworth, Walter Jardine, Gert Selheim and Ivor Horman. Service Agencies (later called Advertising Agencies): Paton, Samson Clark, The Specialty Service, etc.

## Reusing cover designs

For economic reasons, cover designs were used repeatedly for a number of years. For example the cover of the girl with a basket by 'Droyd' was used in Melbourne between April and November 1932 and then again in 1939. Another was used in 1936-37 and again in 1940. This recycling was suspended from time to time when J.C. Williamson commissioned a

special cover for productions such as 'The Desert Song,' or 'The Vagabond King' before reverting to the regular design. Some covers adopted designs like the famous poster created for Ricordi of Milan for the Premiere of Puccini's opera Turandot and used widely by J.C. Williamson throughout Australasia. In other cases a staff or freelance artist in Melbourne created original designs or redrew others imported from abroad.

Not only did The Theatre Royal, The Comedy Theatre and His Majesty's in Melbourne use the same covers for years, but also the Tait brothers, who managed J.C. Williamson theatres, recycled the same artwork at different times in Adelaide, Brisbane, and Sydney and in New Zealand.

A closer look at all programmes, including the Souvenir Programmes, reveals that each was issued in batches throughout the season of a play or musical. Venues changed when productions were moved from one theatre to another; performers and advertisers came and went and layouts were altered accordingly. Tom Edmonds, an office boy who started work at The Specialty Press in 1939, told me that his last job at night before he went home was to take the night's theatre programmes, after corrections had been made, up to the theatres.

Therefore two apparently identical programmes might have more or fewer pages (numbered or with unnumbered inserts); or might refer to plays whose seasons had begun earlier or to a forthcoming attraction in another theatre. Consequently advertisements, photographs and articles were often placed on different pages – and no doubt one day someone will be interested enough to chart the efficiency of these adjustments to page layouts and the subsequent reorganising the forme by the compositors before going to press.

The benefits obtained from this indexing exercise have been demonstrated already by the speedy location of items such as articles about Colonel De Basil's Monte Carlo Russian Ballet, about Nellie Stewart, and Australian plays performed in Melbourne before World War II and unexpected background notes to culturally different plays (such as a glossary of American boxing slang compiled for Australian theatre-goers and inserted into the programme for the play 'Is Zat So?' in September 1926. It show that many American fight terms have been absorbed into the language, and that theatre-going Australians were themselves using a brand of BBC English that has since passed into history.

Headed: Read this over and take it away with you, and talk about it to your friends – We have from the 'Glossary of Slang' – A dame, frail, skirt, Jane, Wren, bread – for girl; a go, or a mill bout for a prize fight (perhaps the origin of the Australian 'to have a go' or a 'fair go'). A Brow [a person] of low intelligence (now used as lowbrow which is somewhat different). The pejorative: goof, goofer, sap, tramp, and dumbbell – in the Australian BBC English of the time defined as a stupid fellow. Likewise a Gorilla became a Rough Fellow. And there are a few surprises too –Apple Sauce, Banana Oil – defined as: all wrong, or no good, was in a later context (the title of the play 'Applesauce') defined as a false compliment akin to 'soft soap' suggesting that the meaning was either loose or had shifted). A frame – defined as one round of a prize fight (curiously this meaning is not given in the 1987 edition of the *Australian Oxford Concise English Dictionary*), and colourfully – table finisher was a wry term given to a Glutton.

If I might be excused another gem extracted from J.C. Williamson's theatre programmes, audiences of R.F. Denderfield's 1950 comedy 'Worm's Eye View' were reminded that (I quote)

> during the [1939-45] war, Australia was in the fortunate position that such tribulations as Billeting were practically unknown. In fact, Adelaide was the only city in which the Government had to take steps in this direction, and then for a short time only.
>
> In the British Isles, things were grimly different. With thousands of Britishers from all the Services to be quartered, to say nothing of Canadians, Australians, New Zealanders, Americans, Poles and Free French, it was beyond the capacity of the vast numbers of camps to accommodate them all. Consequently, every home in certain areas had to register its number of rooms and size of family; billeting officers would call in due course and the owners would be told how many men they had to billet. They were paid by the service from which the men came. In other cases, the residents were given a choice of servicemen or evacuee children from London.

Historical details, so succinctly put, are rare in history books, but journalistic compression sometimes shines through in these ephemeral publications.

A final example is a testimonial written by Sir John Monash recommending that the public should see the play 'Journey's End'. At first R.C. Sherriff's play 'was rejected by most theatre managements in London; some thought that the public [would] not want to [be reminded of the 1914-18] war, others [thought] that a play without women would not be popular – at last it was given a single Sunday evening performance by the Incorporated Stage Society in December 1928. Laurence Olivier, then 28 years old, played Stanhope on that occasion. This background aside found in Heinemann's 1987 schools edition brings with it a reason why the Taits asked Sir John for his endorsement.

It is relevant that Australians who were, and remain famous, on the international circuit are featured along with great English, European and American stars who performed in Australia. Melba, Gladys Moncrieff and Peter Dawson, Coral Brown, Barry Humphries, Michael Caton and Robert Helpmann are featured alongside Dame Clara Butt, Richard Crooks, Anna Pavlova, Paderewski, the Menuhins, Victor Borge and Danny Kay.

In compiling this finders' guide (and I prefer finders guide to indexed bibliography) it has also been noticed that amateur genealogists who want to find performers for their family histories are in pursuit of the lesser lights of the theatre. Without a guide of some kind this is a hit and miss affair. Performers who were once well known are forgotten today. The example of Kathleen Fanning, who later appeared on the stage as Kathleen Goodall, comes to mind as a performer whose singing career began with her role as understudy to Gladys Moncrieff in 'Maid of the Mountain' ended with regular performances for ABC radio. J.C. Bancks (creator of Ginger Meggs), and incidentally, John Tait's son-in-law, was also a playwright – the author of *Blue Mountain Melody*.

Much can also be gained from a survey of advertisements in theatre programmes. Some ads were inserted in support of political campaigns like the prohibition referendum, or the plea made in support of a benefit concert for the League of Nations and publicity for the 1932 Imperial Economic Conference in Ottawa.

## Conclusion

In conclusion, compiling an index is an educational journey into the past. It draws us to forgotten acts of commission or omission and places them in context. It is the opposite of a library, where, as Alberto Manguel says:

> Whatever classifications have been chosen, every library tyrannizes the act of reading, and forces the reader – the curious reader, the alert reader – to rescue the book from the category to which it has been condemned.

# The VOCED Database – from indexing to dissemination

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***Abstract***

*VOCED is a research database for technical and vocational education and training (VET) managed by the National Centre for Vocational Education Research. It is a free database available on the world wide web at www.voced.edu.au. It contains over 30 000 abstracts and full text links to documents about vocational education and training research, policy and practice, from around the world. This paper will focus on the purpose of the database. It will go behind the scenes to look at the processes and rationale used to capture, index and abstract resources to produce a friendly, easy to use database with value added products such as a online thesaurus and a 'landmark reports' section that identifies and lists those key documents that have influenced the development of the Australian national and state VET systems.*

# Learning architecture: issues in indexing Australian education in a Web 2.0 world

**Pru Mitchell**

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***Abstract***

*As Australia's national ICT in education agency,* education.au *faces the challenge of indexing web resources, learning objects and teacher-created resources for optimum discoverability by students and educators across all sectors of Australian education. This paper provides an overview of current thinking about learning architectures, and raises questions about how educational institutions are managing the cloud of learning resources currently available.*

*Particular issues include how to provide seamless access to the most relevant learning materials from the wide range of resource collections on offer; how to ensure Australian-specific vocabularies are used to describe curriculum resources and how to keep pace with terminology to describe the rapidly changing world of technology in education.*

*As well as being concerned with traditional concepts of collections, cataloguing and copyright, information professionals in the education sector are now dealing with creation of metadata to describe new forms of learning including collaborative technologies, communities of practice and professional learning events. This paper reports on issues, strategies and a vision for learning architecture that incorporates the best of both worlds.*

## Learning architecture in Australia

### Information architecture

Information architecture is described as 'the practice of structuring information (knowledge or data) for a purpose[1]' [Wikipedia] and defined as 'the art and science of organizing and

[1] 'Information architecture' 2007, *Wikipedia*, http://en.wikipedia.org/wiki/Information_architecture

labeling web sites, intranets, online communities and software to support usability and findability' by the Information Architecture Institute.[2]

It is the concepts of *usability* and *findability* of resources for education that are central to this paper.

### edna metadata standard 1.0[3]

Ten years ago, Education Network Australia (edna) was a very early entrant to the web world. It established a robust information architecture to provide what education was asking for at that time: a way to find web content that was useful for educators.

In what was a totally new environment, the edna architects (along with architects of similar initiatives) established an information architecture using philosophies and practices translated from their previous experience, namely the world of librarianship and indexing. Some wise person called it metadata (perhaps so that librarians and indexers had an opportunity to reinvent themselves in the IT era) but essentially the highly standardised and centralised systems of cataloguing, indexing and classifying were adapted to describing and organising online resources, and the edna metadata standard version 1.0 was launched in 1998.

This standard has served Australian education reasonably well for 10 years with minimal changes, facilitating both usability and findability. However, the world of information architecture in education is changing, and the world of the web has changed dramatically. This paper discusses the impact of this change on information architecture and the indexing of education resources.

## MCEEYTA learning architecture framework

In education the concepts of information architecture are often combined with elements of technical architecture and referred to as *learning architecture,*[4] similar to the trend for some organisations to refer to a Chief Learning Officer[5] in place of the more traditional Chief Information Officer. There is however plenty that is familiar to information architects in the guiding principles of learning architecture as set out in the MCEETYA[6] policy document for Australian education entitled *Learning in an online world: learning architecture framework:*

- a consistent experience for staff, students, parents and communities
- access anytime, anywhere, by those who need the information
- an authoritative source for each item of information
- a capability for self-service

2 'About us' 2007, Information Architecture Institute, http://iainstitute.org/pg/about_us.php
3 *EdNA metadata standard 1.1* 2002*, education.au* http://www.edna.edu.au/edna/go/resources/metadata/pid/261
4 *Learning architecture framework* 2003, MCEETYA, http://www.mceetya.edu.au/verve/_resources/25aagenda.pdf
5 *Archer College* 2007, http://www.archercollege.com/html/company.html
6 MCEETYA = Ministerial Council for Education, Employment, Training and Youth Affairs

The complexity of the typical technical architecture supporting an education institution is significant with multiple systems and functions at the institutional level including:

- content management systems, including library systems
- learning management systems
- finance and asset systems
- staff and student management systems, and
- assessment and reporting systems

## *education.au's* learning architecture services

*education.au* contributes several key elements to the national learning architecture for Australian education and training at the systems level with the following services.

**Content repositories**
*education.au* has developed and maintains the significant national repositories that are the foundation of the edna,[7] myfuture,[8] government education portal[9], and global education[10] websites plus an increasing number of other national collections.

**Content sharing**
Aggregation of content to enhance sharing across jurisdictions is a key focus of the *education.au* architecture platform, offering harvesting of metadata records, harvesting of terms to build search indexes and the export of content via RSS, html and javascript.

**Search**
*education.au's* Distributed Search Manager[11] enables federated searching across significant but architecturally diverse education collections and catalogues in Australia and internationally.

**Communication and distribution tools**
email Lists[12] services facilitate distribution of news, communication and discussion amongst 40,000 Australian educators via an integrated web interface.

**Collaboration and social networking tools**
Groups[13] services provide forums, chats, blogs, wikis, web conferencing, e-portfolios, podcasting and shared webspaces within a secure, supported collaborative infrastructure.

7 *Education Network Australia* (edna), http://www.edna.edu.au/
8 *myfuture*, http://www.myfuture.edu.au/
9 *Government Education Portal*, http://www.education.gov.au/
10 Global Education website, http://www.globaleducation.edna.edu.au/
11 *Distributed Search Manager* (DSM), http://search.edna.edu.au/
12 *edna Lists*, http://lists.edna.edu.au/
13 *edna Groups*. http://groups.edna.edu.au/

**Access management**
A single sign on[14] implementation that integrates edna services has been in place for two years, with more extensive models for trusted systems proposed.[15]

**Domain names**
*education.au* is also the Registrar for the edu.au domain space,[16] an essential element in the architecture, information policy and governance of Australian education.

It is important as information architects and indexers to consider the whole of an information ecosystem, and the preceding discussion aims to provide a national education context. However, it is the content layer of learning architecture that is of chief interest to an indexing audience. This is the layer that includes the fundamentals of the profession: search, repositories, vocabularies and thesauri. Keeping in mind the two goals of **usability** and **findability** what are the key issues for *education.au's* users in these areas, and how are we addressing these issues?

## Search

It is sobering to take a tour of the typical content architecture in Australian education today following the issue of *resource discovery*, or a*ccess to information* or simply s*earch*. What is the reality for teachers and students seeking learning resources?

**Physical learning resources**
The history of automated library systems in education is nearing 20 years. Best practice has been for the library to catalogue all learning resources; except perhaps science and physical education equipment, although in some schools their library management system does indeed double as their asset management system. Practically all Australian education institutions have best practice library catalogue records built to international standards thanks to very high quality and reliable service from the National Library of Australia[17] or SCIS[18] for over 20 years. These MARC records mean a library's data can be used in any MARC-based system, can be transferred between systems and can be shared with other MARC-based systems.

**Web-based resources**
Since 1996 educators have been faced with decisions on how to organise access to the rich store of learning resources available via the world wide web. Organisations including edna, education departments, SCIS and commercial providers have been cataloguing websites for maximum access by Australia's education and training community. Institutions have also been 'cataloguing' websites on intranets without reference to cataloguing standards.

14 *edna Single sign on*, http://login.edna.edu.au/
15 Hendrick, G 2006, *Trusted services in education: a proposed implementation model*, *education.au* http://www.educationau.edu.au/jahia/webdav/site/myjahiasite/shared/papers/trusted-servicesGH.pdf
16 *edu.au domain registrar*, http://www.domainname.edu.au/
17 National Library of Australia, http://www.nla.gov.au/
18 *Schools Catalogue Information Service*, http://www.curriculum.edu.au/scis

**Digital learning objects**
Schools, TAFE and universities now have the challenge of other content such as learning objects[19] and with them the advent of content management systems, learning management systems, digital repositories, portals, VLEs and various other terms used by particular systems. Best practice in cataloguing in this environment usually involves Learning Object Metadata (LOM)[20]. Learning Object Metadata typically includes more granular curriculum specific fields than previous cataloguing and indexing systems.

**New formats**
In tertiary education, and increasingly in schools, provision of full-text electronic journal databases or networked video and music resources means there are several more, largely proprietary, repository systems and corresponding search interfaces to be added to this list.

## Integrated search

This is a very simplistic division of types of access to learning resources, but one which represents the current situation for many in Australian education. Basically the architecture is such that a teacher or student who is seeking a resource to support learning is expected to know first where this resource is located, be it the library, the internet, their Learning Management System or another repository, and to choose a particular search accordingly. If they don't know, or if they want to collate resources from more than one source, they must conduct three or four separate searches. For users brought up with one-stop online search engines this is not a sustainable or successful strategy for a 21st century learning environment. This is working against both usability and findability.
There are two basic models for addressing this problem. The first involves aggregating all learning resources in one huge catalogue or repository regardless of format. The other model is to work for an informed, coordinated adoption of standards so that a single search syntax can move across these multiple repositories and return accurate and relevant resources.

*education.au* has worked on strategies that address this issue in both ways. Using the first model we maintain aggregated content repositories such as myfuture for careers information and edna for learning resources, news and events information. edna has metadata for over 34,000 resources obtained by direct entry and by harvesting metadata from third party collections. This is a labour intensive strategy but one which enables us to do well in the usability stakes as we have total control over the metadata quality and the vocabularies used.

On the other hand, *education.au's* Distributed Search Manager[21] is also successful in giving searchers access to an estimated 1 million resources by searching across multiple collections or repositories including the ABC[22], ACER's EdResearch[23], MERLOT[24], Picture Australia[25]

19 'What is a Learning Object' *The Le@rning Federation FAQ*, http://faqs.thelearningfederation.edu.au/faqs/index.php?module=faq&FAQ_op=view&FAQ_id=43
20 *Learning Object Metadata*, IEEE Learning Technology Standards Committee http://ltsc.ieee.org/wg12/
21 *edna Distributed Search Manager*, http://search.edna.edu.au/
22 *ABC Online*, http://www.abc.net.au
23 *EdResearch Online*, http://www.acer.edu.au/library/catalogues/edresearchonline.html
24 *MERLOT*, http://www.merlot.org/
25 *Picture Australia*, http://www.pictureaustralia.org/

and VOCED.[26] While distributed searching greatly enhances the findability rates for users by returning results from a much larger content pool, this type of search does make it very difficult to ensure relevance of results when searching across collections of different sizes, quality, audience, languages and formats, as well as different metadata and interoperability standards. Another element that is particularly challenging is management of multiple vocabularies.

### Thesaurus-assisted search

edna's advanced search[27] seeks to make maximum use of all available metadata and controlled vocabularies, and enhancing this aspect of search is a major priority. Current features include use of *edna-sector* as a way of returning resources for particular audience types, and *coverage* as an important element in the distinction between Australian and international content. A thesaurus assisted search makes use of thesauri to assist users broaden, narrow or refine their search based on terminology and relationships in one or more of the following Australian thesauri: ATED: Australian Thesaurus of Education Descriptors,[28] ScOT: Schools Online Thesaurus[29], VOCED: Vocational Education Thesaurus[30] and AGIFT: Australian Government Interactive Functions Thesaurus[31].

Thesaurus-assisted search is a valuable findability tool but it relies heavily on the availability of see references or use for terms from non-preferred terms, otherwise the user who needs the suggestion most, that is the user whose chosen search term has returned no results, cannot be directed towards a suggested alternative search term.

## Vocabulary maintenance

### education.au vocabularies

The edna metadata standard 1.0 contained a number of controlled vocabularies using the edna namespace, developed in collaboration with all states and territories and sectors in the late 1990s.

| | |
|---|---|
| **edna-audience**: | used to describe the audience group for whom a resource is intended or relevant, eg parent, teacher, administrator, student |
| **edna-curriculum**: | used to refine DC.Type for curriculum related publications |
| **edna-document**: | used to refine DC.Type for publications and documents |

[26] *VOCED*, http://www.voced.edu.au/

[27] edna advanced search, http://www.edna.edu.au/edna/go/search/?SearchMode=advanced

[28] *ATED: Australian Thesaurus of Education Descriptors*, Australian Council for Educational Research, http://www.acer.edu.au/library/edthesaurus.html

[29] *ScOT: Schools Online Thesaurus*, The Le@rning Federation, http://scot.curriculum.edu.au/

[30] *VOCED: Vocational Education Thesaurus*, National Centre for Vocational Education Research, http://www.voced.edu.au/

[31] *AGIFT: Australian Government Interactive Functions Thesaurus*, National Archives of Australia, http://www.naa.gov.au/recordkeeping/gov_online/agift/summary.html

**edna-kla**: used to refine DC.Subject to indicate Key Learning Area for school related resources

**edna-spatial**: used to refine DC.Coverage to indicate Australian state/territory

**edna-userlevel**: used to refine edna.audience to indicate level of education the resource is intended for, eg 0-13 for years of schooling

In 2006 an edna metadata application profile[32] was published to coincide with updating of the edna website, and new vocabularies were added in the ev (events) namespace to support edna and partners' event calendars.

**ev-mode:** used to indicate whether an event is being offered in online mode, face to face, or both online and face to face.

**ev-type:** an extensive list of event types describing academic year dates, conferences and professional events, recurring commemorations/celebrations and opportunities including competitions and scholarships.

These schemes are published and kept up to date in the *Australian Metadata for Education* discussion Group[33] at: http://www.groups.edna.edu.au/course/view.php?id=1132

## New terminology

How can we ensure that our vocabularies are well-maintained and updated to keep abreast of new and changing terminology? A particular challenge for *education.au* as an ICT in education agency is the area of emerging technologies in education. edna-document is an example of a vocabulary that is no longer meeting our needs. How do we show blogs, wikis, online communities, online communities and email lists in this element? edna has an extensive browse structure based on a vocabulary known as edna.category which has been developed in collaboration with sectors and jurisdictions. This is a vocabulary that is much more able to be responsive to new terminology, concepts and priorities in Australian education as edna Information Officers are in a position to develop new categories as demand for the topic from users becomes obvious. However, the challenge in naming new edna categories is to determine the most appropriate term when in most cases there is not yet any term for the concept in an established education thesauri. Issues include guarding against fad words and deciding whether to stay with a very broad term, or to add all the instances of a concept. For instance are wikis and blogs just forms of online publishing, or do they warrant their own term? In education there is an increasingly number of terms where an e- prefix is attached. Is e-learning a significantly different concept from learning, requiring its own term in a thesaurus? How does a thesaurus accommodate an educational philosophy that advocates integration of ICT in education such that a separate term for educational technologies is

[32] *edna metadata application profile* 2006, http://www.edna.edu.au/edna/go/resources/metadata/edna_metadata_profile

[33] *Australian Metadata for Education Group*, http://www.groups.edna.edu.au/course/view.php?id=1132

discouraged? As vocabulary builders we would do well to look to the international guidelines in this area for guidance in the determination of terminology.

**Literary warrant**

The *Guidelines for the construction, format and management of monolingual controlled vocabularies* ANSI/NISO Z39.19-2005[34] give the following advice in terms of determining literary warrant.

> words and phrases drawn from the literature of the field should determine the formulation of terms. When two or more variants have literary warrant the most frequently used term *should* be selected as the term.

So how should we measure the most frequently used term? Is this frequency of the term in a search of edna, another Australian education repository, or internationally in ERIC[35]? How many hits does a term have to have before it is warranted for inclusion in a thesaurus? Is there a certain length of time that a term needs to have been in use to be included in a formal vocabulary?

**User warrant**

The *Guidelines* define user warrant as 'justification for the representation of a concept in an indexing language or for the selection of a preferred [subject] term because of frequent requests for information on the concept.' User warrant is determined from the words or phrases being frequently used as search terms by users. This requires careful recording and attention to what users are actually searching for and finding or not finding. National and regional contexts should also be considered when developing subject terms.

**Scope Notes**

For new terminology it is highly desirable to define the terms as they are included. edna and the Schools Online Thesaurus both have policies that the latest edition of the *Macquarie Dictionary*[36] will be used as the authority for spelling and definitions, and items included in *Macquarie* will not require scope notes in the ScOT thesaurus. However, new technology terms may frequently not be in *Macquarie* by the time we start using it in an online service.

**References**

To manage multiple terminology while new technologies are 'settling in', see references and related terms are very useful, and particularly so when using a thesaurus to assist search, or in the future to support a move to semantic web functionality.

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34 *Guidelines for the construction, format and management of monolingual controlled vocabularies ANSI/NISO Z39.19-2005* 2005, National Information Standards Organisation, Bethesda, http://www.niso.org/standards/resources/Z39-19-2005.pdf

35 ERIC: Education Resources Information Center, Institute of Education Science, US Department of Education, http://www.eric.ed.gov/

36 *Macquarie dictionary, 4th edition* 2005, Macquarie Library.

## Vocabularies and Web 2.0

The preceding discussion deals with issues raised for information professionals and vocabulary services by changes in the terminology of technology. There is however, a more fundamental challenge to address in the near future, thanks to the so-called Web 2.0 environment, where as well as changes in the terminology of technology we are faced with changes in the technology of terminology. It is not just the terms themselves that are changing but the whole method of creating and assigning terms to describe resources.

### Web 2.0

The term Web 2.0 is used to refer to online services that include a social component, where the community as a whole contributes, takes control, votes and ranks content and contributors. O'Reilly[37] is credited with the definition of this particular information architecture, in which an improved form of the world wide web is viewed as a platform, with data as the driving force, built through an 'architecture of participation'.

A tour through examples of representative Web 2.0 services such as those in the Web 2.0 logo quilt[38] show how the web is changing and moving towards a place where people can socialise and share resources and knowledge. Central to most Web 2.0 services is functionality that allows users to assign a keyword or descriptor to objects or content, and one of the key building blocks of Web 2.0 information architecture is the tag.

### Tags

Definitions of the word 'tag'[39] are numerous and it is interesting to note how many of them provide insight into the multifaceted nature of tags in Web 2.0 applications. Allusion to tags as nicknames or the work of graffiti artists illustrates the informal nature of tags, while reference to html tags and markup language emphasises the technical heritage of tagging. It is presumably from the keywords meta tag that the Web 2.0 use of the term developed, as seen in code such as <META NAME='KEYWORDS' CONTENT= 'education, training, Australia, conferences'>, where meta-tags were designed to give information to search engines or databases for indexing. However a tag in Web 2.0 is not buried and hidden away in a website's source code or metadata record, but is up front and in the face of users. It reveals how users have annotated their own material or other's content, using keywords or descriptors that they believe will enhance findability or categorisation.

### Tagging as categorisation

Tags are used in several ways and for different purposes by different services and by different users. Bloggers customarily use tags to categorise journal posts by subject, usually tagging each post with only one, or maybe two, quite specific categories, which become part of a

37 O'Reilly 2005, *What is Web 2.0?* http://www.oreillynet.com/pub/a/oreilly/tim/news/2005/09/30/what-is-web-20.html

38 *Web 2.0 logo quilt*, http://web2logo.com/

39 'Tag', http://wordnet.princeton.edu/perl/webwn/

browse menu on the side of the blog. These categories are often well thought out, readily understood by visitors to the blog and generally represent a controlled list of topics - unless the author has extremely diverse interests or an extensive blog history. See this example from the blog[40] of Kerrie Smith, Communications Officer at *education.au* with categories outlining key topics of expertise and interest to this blogger. In this case where the content creator is tagging their own content, the prime purpose of the tag is for organisation or categorisation. It enhances findability for the blogger, and one assumes for community of users interested in reading this blog. There is however potential for such tags to be highly personalised or idiosyncratic and of less value to other general searchers.

Possibly the quintessential application employing tagging currently is *del.icio.us*.[41] In this social bookmarking service users categorise websites or bookmarks (or favourites) using tags. For some users the priority is to create unique tags that will mean nothing to anyone but themselves, for instance Year10ASCI as a tag to collect together resources for their Year 10 Science class. Users who are seeking to exploit the social networking capacity of *del.icio.us* will choose tags that mean something to their community or team, so that they can pick up new resources of shared interest. *Del.icio.us* continues to develop its tagging functionality, and features such as tag bundling, tag description and tag re-naming are indications that users of social tagging are recognising some of the issues inherent in vocabulary management, many of which are very familiar to thesaurus managers and have been well documented in the information management literature.

## Tagging as description

Tagging is particularly powerful as an indexing tool for the increasing quantity of non-text format content being published online. Indexing is of vital importance to the findability of photographs, podcasts, videos, learning objects and animations. No teacher or student has time to watch every video or listen to a series of 20 minute podcasts to determine their usefulness for a lesson or assignment. Accurate and meaningful subject analysis, description, audience and format information is required. Reviews and ratings are also useful. Tags, reviews and ratings are used extensively and effectively in image library sites such as flickr[42] and video sites such as TeacherTube.[43]

## Tagging as indexing

Of course, the addition of keywords to content (be it a website, picture, audio file or video clip) to describe its subject matter is hardly a new concept to information professionals. This activity is simply subject indexing. What is new is that the tagging is being done by anyone. It is no longer the domain of a small group of experts. What does this mean for both the indexing and for that small group of experts?

The following table reviews user tagging against the Australian and New Zealand Society of Indexer's (ANZSI) description of the work of a professional indexer in 'Who We Are and

40 Smith, K 2007, *You are never alone*, http://blogs.educationau.edu.au/ksmith/
41 *del.icio.us*, http://del.icio.us/
42 *flickr*, http://www.flickr.com
43 *TeacherTube,* http://www.teachertube.com/

What We Do.'[44] It is not difficult to see relationships between tagging and indexing as it is defined in this way.

| **Professional indexing (ANZSI)** | **User tagging** | |
|---|---|---|
| the provision of locators | ✔ | hyperlinks used to provide locators |
| make it easy as possible for someone to find what they are looking for | ✔ | tags can be searched and browsed |
| within a large collection of information | ? | debate about how scalable tagging is in a large collection, tag clouds are not always scalable[45] |
| involves semantic analysis | ✔ | although the rigor of semantic analysis may be more variable |
| indexer determines the meaning of the material in the collection | ✔ | tags focus on individual items more than the collection as a whole, but they can show relationships between items |
| finds ways to summarise and represent meaning in an easy-to-use form | ✔ | tags are easy-to-use summaries of meaning to the particular user or their community |
| linked to the original information | ✔ | tags usually visible on the original source |
| locators provide quicker / easier access to smaller units | ✔ | tags can be quicker to navigate than printed indexes |
| not just a concordance or full text search system | ✔ | user tagging provides good visual alternative to full text searching |
| locators follow a meaningful sequence, which is usually alphabetical | ✔ | various sequences are usually available, alphabetical and frequency |

## Folksonomy

One major difference between professional indexing and the tagging taking place in Web 2.0 is that indexing generally involves use of a controlled vocabulary, taxonomy or thesaurus, while social tagging is much less likely to employ such a tool. This distinction is not obvious from the description of the professional indexer used above, but I believe it is one area that warrants further attention. How important to findability and usability is the consistency of description strived for by the use of an authoritative, controlled vocabulary as opposed to the user-specified terms employed in social tagging systems?

Folksonomy is a term used to refer to 'user-generated classification associating keywords with content.'[46] The term has obviously derived from the concept of taxonomy, and the idea of a vocabulary that develops from a particular community of users, rather than an external authority. A simple example of where folksonomy is employed effectively is Attendr[47] where

44 'Who we are and what we do' 2007, ANZSI. http://www.aussi.org/administration/aboutAusSI.htm

45 Shanks, P 2006, *extisp.icio.us tag cloud* http://www.flickr.com/photos/botheredbybees/259548406/

46 *Folksonomies*, e-government Victoria, http://www.egov.vic.gov.au/index.php?env=-categories:m1124-1-1-8-s&reset=1

47 *Attendr*, http://www.attendr.com/

users agree on a tag to use for a conference in order to gather all participants' online activity and comments around the conference.

Research into the relative quality and applicability of user tagging, reviewing and rating is limited, not surprisingly given the relatively recent advent of this activity. There are some interesting applications such as Google Image Labeler:[48] which aim to improve the quality of tagging. Users are randomly paired with an online partner and over a 90-second period, both are shown the same set of images and asked to provide as many labels as possible to describe each image. When both partners provide the same label this is considered to be a representative tag which should be added for that image.

Librarything[49] is a special case which combines the two worlds of MARC catalogue records and social tagging to provide an enhanced cataloguing and community service centred on books. Perhaps this service could be a source of data about the relative merits or effectiveness of controlled vocabulary terms and user tagging, by comparing the relevance of hits returned from catalogue terms with those returned from user tags. Such research is vital for informing future information architecture and allocation of resources to improving indexing, thesaurus development and search. Questions that arise include what do folksonomies have to offer thesaurus developers and indexers, and what does a thesaurus like ScOT have to offer social tagging?

## Taxonomy Directed Folksonomy

This last question was addressed recently as part of an edna personalisation project, by Nick Lothian, technical architect at education.au who developed a proof of concept for what he calls a taxonomy directed folksonomy.[50] This was an attempt to combine a taxonomy, in this case the ScOT thesaurus, with user tagging. When tagging a resource the user is shown appropriate terms from the thesaurus in the hope that if a term shown meets their needs, they will select a term from the thesaurus over a non-preferred version which they might have used had the thesaurus term not been 'in their face'. Of course, if the thesaurus term does not meet the user's need, they can continue to input their preferred term. The benefits that a thesaurus provides in terms of broader, narrower and related terms are passed on to the user, and hopefully the use of non-preferred terms is reduced. In future development it is envisaged that the thesaurus managers can review the terms contributed by users where an appropriate thesaurus term was not found, and use this information to improve the thesaurus.

## RSS: Subscription as alternative to search

Another keystone in Web 2.0 architecture is content delivery via RSS. RSS stands for Rich site / Really simple syndication, and enables users to subscribe to online content and have it delivered to their desktop. By subscribing to services that provide content that is regularly updated such as news, events, music or episodes of a radio or television programme, users keep up to date with their chosen topic or show. In addition to the immediacy benefits of this

48 *Google Image Labeler*, http://images.google.com/imagelabeler/
49 *Librarything*, http://www.librarything.com/
50 Lothian, N 2006, *Taxonomy directed folksonomies*, http://blogs.educationau.edu.au/nlothian/2006/12/13/taxonomy-directed-folksonomies/

functionality, and the personalisation it offers, there are also major impacts in terms of resource discovery. Users can subscribe to tags or keywords to further customise the content they receive. This represents a convenient alternative to searching for content, particularly for topics where the user wishes to keep abreast of new developments and content over time. For this user, there is an assumption that the tag they have chosen to track is in fact a representative enough term to produce a comprehensive set of results. While this may work well for an agreed folksonomy term such as the tag for a conference, for more general topics subscription via RSS usually involves elaborate search syntax, subscription to multiple feeds to cover all bases or restriction of feeds to tags from trusted colleagues only. This is a case where wider use of a controlled vocabulary would be highly beneficial to improve the probability that the term subscribed to will return highly relevant and usable content.

## The future: Indexing 2.0

One intention of this paper in considering the key elements of information architecture in an online information service such as edna, and tracking changes over the past ten years, was to consider or predict what might be key elements of online information architecture in the future. It seems that more questions than answers have been generated in considering what implications this has for our work, and where we go from here? While the paper has concentrated on Web 2.0 and the possible impact of user tagging on the future of indexing, it is important to acknowledge also the potential of automated processes to dramatically change indexing and information architecture in the future. Browne[51] describes this as a 'decrease in human indexing and rise in Machine-Aided Indexing (MAI), in fully automated indexing and in the absence of indexing (replaced by free-text, full-text search).' Comparing the usability and findability of this machine-generated from full-text format versus the more traditional human indexed metadata format is one more area requiring ongoing research. The US Presidential Speeches site[52] is an interesting example where tag clouds generated by largely automated machine indexing of text are 'mashed-up' in a timeline format and presented in a highly visual manner, creating a completely new and extremely powerful information product for history students.

The challenge I am left with is how we create a future where large scale creative and functional online services are developed that combine the best of each of these approaches to indexing? Namely the ease, power and speed of the automated indexer plus the high quality, value-added and standards-focused data returned by the professional human indexer, as well as the user-centred, popular terminology of the social tagger.

[51] Browne, G 2007 'Convergence: the future of indexers and other professionals' *Information Online 2007*, http://www.information-online.com.au/docs/Presentations/infoonline_paper.pdf

[52] Mehta, C 2007, *US presidential speeches tag cloud*, http://chir.ag/phernalia/preztags/

# Report: Book launch: *The Indexing Companion*[1]

**Glenda Browne**[2]

*The Indexing Companion*, by Glenda Browne and Jon Jermey, published by Cambridge University Press, was launched by Pam Peters at the ANZSI conference.

Jon Jermey and Glenda Browne

The tea room proved to be a cosy venue for the speeches, for browsing and buying this book (along with others from CUP and SI), and for enjoying afternoon tea with like-minded colleagues.

Pam Peters spoke about the book having breadth and depth, a range of international examples, and a lot of current references, many to freely-available websites. She also said that the book was fun. One of the aims was to show that indexing is a human activity, starting with the first quote from Seth Maislin saying that his biggest achievement has been convincing his mother-in-law that indexing is cool!

Pam also mentioned that analogy borrowed from author Sonya Hartnett, who used to write stories higgledy-piggledy as the ideas arrived, using the 'ride a wild pony approach', but who now structures things more carefully from the beginning, following her 'dressage' approach.

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1 Browne, Glenda and Jermey, Jonathan (2007) *The Indexing companion*. Melbourne: Cambridge University Press. $49.95, ISBN 978-0-521-68988-5, 240 pages.

2 Reprinted with permission from *ANZSI Newsletter*, vol. 3, no. 3, 2007, p. 2.

Glenda thanked the people who had been involved in the development of the book, which grew out of an interesting chain of events.

The starting point was Auslib Press, who published Jon and Glenda's first book, *Website indexing*. That book was added by Sue Woolley to a list of good books on indexing that was being circulated to editors. Susan Keogh saw the list, and suggested they publish with CUP. They contacted publisher Jill Henry who sent their proposal to CUP in Melbourne and then Cambridge (where it was assessed by the 'Syndics').

Thanks were also due to the many staff at CUP who assisted at all stages of production, including Kate Indigo, who they met for the first time at the conference. Fundamental to the book were the indexers whose writings and discussions over the last 18 years stimulated their thinking and provided much of the content for the text.

The three anonymous readers who commented on the book proposal all made suggestions enhancing the final book. Suggestions included writing a section analysing the future of indexing, discussing both open system (collection) and closed system (book-style) indexing. Maureen MacGlashan, editor of *The Indexer*, later became ‘unanonymous’, and a quote from her final report is printed on the back cover.

Many thanks go to al those who contributed to the excitement of the launch – Pam Peters, for her thorough and positive appraisal, the conference committee for organising the event, CUP staff for running the stall and sponsoring the tea, and all the indexers who attended.

# Data Metallogenica: an innovative image-based mineral deposits database

**Kerry O'Sullivan**

*AMIRA, Melbourne*

***Abstract***

*Data Metallogenica started life in 1970 as a gleam in the eye of dedicated post-doctoral research geologist Peter Laznicka, who later spent his working career as a Professor at the University of Manitoba in Canada. Collecting samples of rock from the mineral deposits of the world was a privately funded passion that occupied almost every moment of his, and much of his family's, time, until his retirement in 1999. Professor Laznicka was the ultimate minimalist when it came to organisation. At each field site he visited, one or more suites of rocks was collected, trimmed, and glued in logical sequence to (approx) A4-sized sheets of aluminium, designed to be housed book-like in vertically slotted shelves. Every 'plate' was assigned a unique number and this number carried through to a companion 'Legend' and all other supporting documentation and materials. At the time of his retirement, DM contained approximately 2,400 rock sets for a total of about 45,000 separate samples. He wished the collection remain in the public domain for the future. After much searching, he came to an arrangement with AMIRA International whereby the collection would be housed in Australia; that he would continue working with it; and that the collection and supporting data would be made accessible everywhere via the World Wide Web. The new owner of DM, AMIRA International, is a non-profit mining industry research broker. AMIRA organised both establishment and development funding for a collaborative venture from a consortium of companies and institutions. On-going operating funds were to be (and are) earned from the sale of (not-for-profit) annual subscriptions. The website www.datametallogenica.com was launched in July 2002. It contained high resolution images of all rock sets, supported by 'Legend' documentation. A professional photo studio and advanced image compression provided users with images of hitherto unprecedented quality. A complementary mineral measurement programme added much mineralogical detail. The next four years saw the range and depth of 'supporting' data expand to include 'data galleries' of mine plans, cross-sections, field photographs, satellite images and more. Technical documents, presentations and whole-text PhD dissertations were, and continue to be, added. The InMagic software products DB/Textworks and Web Server were adopted as*

*data base engine and web tools. A web site 'portal page' framework was designed to simplify navigation, using frames and tables: related data for any given deposit or set of samples is thereby grouped in one place. Map-based searching is being developed for the near future. At the outset, primary user groups were identified to be mineral explorers and educators; the vision has always been to include data on mineral processing and mining itself as resources and funding permit. Data Metallogenica is today widely recognised as the world's most comprehensive encyclopaedia of mineral deposits. It now includes representative sample collections from more than 3,000 deposits in over 70 countries for a total of 70,000 samples and is still growing; supported by more than 40,000 image and text files. Like all great databases, it is a journey and not a destination.*

# Indexers do the darnedest things!

**Jennifer Gawne**

**and**

**Kathy Simpson**

*Sensis, Melbourne*

***Abstract***

*While most indexers are hard at work in the back of books, deep in databases or swathed in the Web, some of us are called upon to apply our expertise to some very odds projects. This paper comprises a quick overview of some of the more unusual jobs undertaken by Indexers at Sensis Pty. Ltd., with background on the commercial drivers and consumer needs that underlie them.*

# Report: Indexers' Roadshow

**Max McMaster**[1]

The Indexers' Roadshow, a deliberate play on words from the Antiques Roadshow, was a new initiative for the 2007 ANZSI Conference. Trainee or less experienced indexers were encouraged to bring along indexes they had compiled or were currently working on and have them evaluated by a team of experts. Five experts (Michael Harrington, Michael Ramsden, John Simkin, Alan Walker, and Max McMaster) were on hand to provide one-on-one feedback to the trainees.

Around 10 trainees or less experienced indexers took advantage of the Indexers' Roadshow to gain individual feedback on their particular indexes. Interestingly enough other trainees were delighted to 'sit in' on another indexer's one-on-one session to pick up valuable hints and ideas. Most trainees received around 20–25 minutes of individual attention, and this was about the right length of time. Anything less would have been a disservice.

A couple of the attendees commented that the constructive feedback they obtained through the Indexers' Roadshow segment more than covered the registration fee for the conference. Any future conference would be advised to have a similar segment.

John Simkin and Dennis Bryans

Tracey Harwood and Alan Walker

Tricia Waters and Michael Harrington

[1] Reprinted with permission from *ANZSI Newsletter*, vol. 3, no. 4, May 2007, p. 6.

# ‘New look’ Society-wide Mentoring Scheme

**Lyn Farkas**

*ANZSI mentoring coordinator*

***Abstract***

*Presentation and discussion on how the new ANZSI mentoring scheme will operate, focusing as much on the mentors as the mentees. The mechanics of how it will operate, particularly details of things like suitable works for indexing, requirements for the mentor and mentee, time frames, fees, reports, procedures, and final outcomes, will be discussed.*

## ANZSI Policy on Mentoring

### Background

The Australian and New Zealand Society of Indexers provides a mentoring scheme for novice indexers. In the absence of formal courses leading to tertiary qualifications, the mentoring scheme provides a more advanced level of training, building on the basic workshops offered by the Society. The mentoring scheme performs a number of functions:

a. It provides novice indexers (mentees) with professional guidance and advice by qualified, experienced indexers (mentors) on a one-to-one basis;

b. It provides indexes to significant published works which lack indexes;

c. It makes indexes accessible in appropriate formats.

### The Scheme

1. The Australian and New Zealand Society of Indexers offers novice indexers a mentoring scheme.

2. The scheme is a Society-wide initiative which draws its mentors from any of its Branches or individual members.

3. The mentoring scheme is administered by a Mentoring Coordinator, under the auspices of the Education Committee.

4. The scheme is dependent on the availability of appropriate mentors.

5. Participation by mentors and mentees is voluntary, although fees will be collected to compensate the mentors for their time.

6. There are specific requirements for the mentors and mentees.

7. Mentees are expected to produce indexes of acceptable basic quality, equivalent to commercial quality in all aspects except for utilising a longer time frame.

8. Works to be indexed must meet the criteria of the mentoring scheme.
9. Indexes produced will be made available in an appropriate format, for example:

    - By mounting the index on the Society's website
    - By providing the index to the library owning the publication
    - By publishing in the ANZSI Index Series, or
    - By publishing the index as a CD-ROM or in other electronic formats.

10. While the index remains the intellectual property of the mentee, ANZSI retains the copyright for the index and is entitled to any proceeds from the sale of an index.

11. There are no limits on the number of times an individual can be mentored, however each mentoring item will incur a new mentoring fee.

## The Mentee

12. An applicant for admission to the mentoring scheme must meet the following criteria:

    a. An applicant (mentee) must be a current financial member of ANZSI and must not be a Registered Indexer;

    b. Applicants should have completed a recognised indexing course (including both theoretical and practical aspects) or have indexing experience. Where required, the Education Committee will determine the suitability of the applicant's experience. Determinations of the Education Committee will be final;

    c. Applicants are expected to have read, or at least be very familiar with one of the recognised indexing texts.

## The Mentor

13. A mentor of a book index must be a Registered Indexer. In cases where the skills of database indexing would be useful (for example in mentoring a journal compilation), an experienced database indexer may be a mentor.

Mentors undertake the following duties:

a. discuss the indexing proposal with the mentee and ensure that the work chosen is appropriate;

b. schedule a series of contacts (usually 5-6) over a period of up to six months. Contacts can be by email, mail, fax, phone, face-to-face or a combination of these;

c. monitor the structure and consistency of the index but not become involved with the intellectual content or do any indexing;

d. advise on particular problems, e.g. forms of names;

e. give the mentee feedback at an early stage and as soon as practicable after each contact;

f. provide brief written reports to the Mentoring Coordinator on the progress of the mentee at least three times: after the initial early feedback; approximately half way through the mentoring; and when signing off the completed index;

g. sign off the completed index as being up to an acceptable standard, based on the criteria outlined in the procedural guidelines for mentors;

h. if an index does not attain an acceptable standard within a reasonable time frame, it is the responsibility of the mentor to inform the mentee and write to the Mentoring Coordinator, giving reasons. The Society reserves the right to then terminate the menteeship;

i. if an index does attain an acceptable standard, the mentor is responsible for sending the completed index to the Mentoring Coordinator so that it can be made available in the most appropriate format.

## The Mentoring Coordinator

14. The administration of the Mentoring Scheme is undertaken by the Mentoring Coordinator who reports to the Education Committee of the ANZSI Council.

Duties of the Mentoring Coordinator are:

a. provide the list of prospective titles created by the Education Committee to the mentee, in order for the mentee to choose a work for indexing;

b. receive completed mentee applications and application fees, and forward components of the applications to the necessary parties, as per the *Mentoring Procedures;*

c. verify that the mentee meets eligibility requirements;

d. recruit potential mentors (see sample letter of recruitment) and keep a register of available mentors;

e. link approved mentees with appropriate mentors;

f. receive feedback from the mentor on the progress of the mentee;

g. receive the completed index that the mentor has signed off as being up to an acceptable standard;

h. liaise between mentor, mentee and the Education Committee, particularly in cases requiring conflict resolution;

i. under the guidance of the Education Committee, make the index accessible in the most appropriate format;

j. identify libraries that hold copies of the work and notify them of the existence of an index;

k. organise payment of the mentor;

l. olicit feedback from the mentees on their experience with the program;

m. maintain the Society's list of prospective titles for the mentoring scheme (i.e. remove works which have been indexed by mentees, add new works as indicated bv the Education Committee).

### Education Committee

15. Details of the composition and duties of the ANZSI Education Committee under which the Mentoring Scheme will operate are provided in the *Committee Guidelines.*

### Procedures for the Mentoring Scheme

16. Details of the mentoring process are provided in the *Mentoring Procedures*.

## ANZSI Mentoring Procedures

### Timing

1. The mentoring scheme has some time-related aspects:

a. Indexing should be completed within six months, but this can be extended to twelve months with the approval of the mentor;

b. Mentees should keep a record of the time they spend on the index for their own benefit. This will be useful data for the mentee, and for the Mentoring Coordinator for assisting others;

c. Mentors should also keep a record of their time and include this in their progress reports to the Mentoring Coordinator. This will give an indication of how arduous the task is.

## Choosing a Work for Indexing

2. The criteria for indexing an item under the mentoring scheme are:

a. Works chosen for indexing can be in any format, including published works, manuscripts or electronic materials;

b. Works should ideally be a minimum of 150 indexable pages and be able to produce an index of at least 600 entries;

c. Works chosen should not have an existing index;

d. Works should be readily available for both mentor and mentee;

e. Works should be of interest to a specific audience or suggested by information specialists (e.g. librarians, editors, etc.);

f. Works chosen for indexing should have a strong subject component, or provide a means of developing skill in a particular genre of indexing (e.g.biographies, genealogical or social history works which have strong name components);

g. Works chosen for indexing can be cumulative works, e.g. complete or partial serial runs, provided they cover a minimum of 5 continuous years;

h. Suitable works for indexing can often be found in local historical societies, higher education institutions, libraries etc..;

i. Works for inclusion on the Society's list can be suggested by interested organisations from their collections, by Branches, or by experienced indexers. These items will be approved by the Education Committee and collated and distributed by the Mentoring Coordinator;

j. Works chosen by mentees must be approved for suitability by their mentors.

## Making an Application

3. Applicants for the Mentoring Scheme are required to:

a. choose a suitable item from the list provided or a work they have found themselves which meets the provisions of the Mentoring Scheme;

b. complete and submit the approved application form (current form is appended);

c. ensure that the mentor has access to the content of the work to be indexed;

d. submit an application fee of A$250.00 per mentoring item. Once a proposal is accepted into the mentoring scheme, this fee is non-refundable. Please note that all other associated expenses are the responsibility of the mentee.

4. Applications should be mailed to the Mentoring Coordinator at the Society's postal address.

## Receipt and Processing

5. Upon receipt of application, the Mentoring Coordinator will:

a. check the application to verify that it meets all requirements;

b. match the mentee with an appropriate mentor (either for geographic proximity or subject expertise);

c. expedite the initial contact and ensure that mentor and mentee have full contact details for each other (address, phone, fax, email etc.);

d. forward the payment to the ANZSI Treasurer to record and receipt;

e. forward a copy of the application to the mentor.

## The Mentoring Agreement

6. Mentoring is a personal process and all participants will approach it differently. It is the responsibility of the mentor/mentee team to work together and decide how they will work together.

7. A 'Mentoring Agreement' is to be drawn up by the mentee which states the basic arrangements made by the two parties. This agreement should be revisited and if necessary revised periodically during the mentoring.

8. The Mentoring Agreement should be attached to the mentor's final report.

## The Finished Product

9. At the completion of the mentoring, the mentee will provide the mentor with an index in a format agreed to by both parties (i.e. print, electronic etc.).

10. The mentor will check the index for accuracy ,style, comprehensiveness and arrangement, using whatever standards had been agreed to by the parties as appropriate to the project (e.g. ISO standard, Style Manual, Chicago Manual of Style etc.).

11. Once the index is deemed acceptable, the mentor will sign off the item and forward the index and a short report to the Mentoring Coordinator.

12. The Mentoring Coordinator will advise the Education Committee when a project has been successfully completed. The Coordinator (if necessary in conjunction with the mentor and/or the Education Committee) will suggest to the Education Committee an appropriate format for distribution. This will most often take the form of mounting the index on the Society's website, but might also include publishing an index as part of the ANZSI Index Series, lodgement of a manuscript copy with the owners of the original work, etc.

13. Once the distribution method is approved by the Education Committee, the Mentoring Coordinator will notify the successful mentee via a letter of congratulations, which will include details of how the index will be distributed (sample appended). This letter will be sent within three months of the forwarding of the mentor's final report to the Mentoring Coordinator.

14. In cases where the work indexed is not a unique manuscript copy, the Mentoring Coordinator will identify libraries that hold copies of the work and notify them of the existence of an index.

15. In cases where indexes are print published, the Mentoring Coordinator is responsible for distributing print copies in the following manner: two copies to the mentee, one copy to the ANZSI archives, and the number of state and national le.g..al deposit copies as required.

16. The Mentoring Coordinator will ensure that the Society's website maintains a register of all mentoring projects which will include the bibliographic details of each work and its index, the index's author (the mentee), the mentor, the year of completion and the distribution format.

## Project Finalisation

17. Upon receipt of the mentor's final report, the Mentoring Coordinator will request that the ANZSI Treasurer make a payment of A$225 to the mentor. This represents the application fee less A$25 to cover Society administrative costs.

18. The Mentoring Coordinator will also forward details of the mentoring project to the ANZSI President, who will arrange and sign a Certificate of Appreciation for the mentor.

19. At the time of sending a letter of congratulations to the mentee, the Mentoring Coordinator will also send a feedback and evaluation form (sample appended). Details from this feedback will be used to improve the operation of the scheme.

20. The Mentoring Coordinator will remove the title of the indexed work from the Society's list of prospective titles for the mentoring scheme.

21. For each mentoring project, the Mentoring Coordinator will keep the following records for a period of five years, after which they can be disposed of in a secure manner:

a. Mentee's application form;

b. Mentor's report;

c. Letter of congratulation;

d. Feedback and evaluation form.

## Cessation of a Project

22. A mentoring project can be terminated for the following reasons:

    a. Mutual agreement between the mentor and mentee, regardless of reason. Note that the application fee will not be refunded, although in cases of conflict it may be possible to arrange for another mentor;

    b. Voluntary withdrawal by the mentee regardless of reason. Application fee will not be refunded;

    c. Illness or major trauma for the mentor or mentee. Application fee refunds will be considered by the Education Committee on a case-by-case basis;

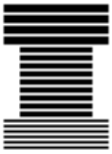
    d. Not completing the project within the extended (12 months) time limits, in the absence of exceptional circumstances. Application fees will not be refunded.

23. Any other reasons for cessation of a project can be discussed with the mentor or Mentoring Coordinator, and be decided on a case-by-case basis by the Mentoring Coordinator.

24. Either the mentor or mentee (as appropriate) can initiate cessation of a project by informing the Mentoring Coordinator in writing of their reasons.

25. The Mentoring Coordinator will confirm the cessation with both parties, allowing either party to show cause why this should not be so.

26. Once the cessation is finalised, the Mentoring Coordinator will notify the Education Committee. If no response to a cessation confirmation has been received from the mentee within four months of the original notification, the mentoring project will be deemed to have ceased and the Education Committee will be informed.



**Australian and New Zealand Society of Indexers**
ABN 38 610 719 006
Email: mentoring@aussi.-org Website: http://www.aussi.org

# ANZSI Mentoring Scheme
# Mentee Application Form

*The mentoring scheme pairs novice indexers with experienced indexers who provide guidance, advice and assistance on an indexing project. Applicants for menteeship should read the provisions of the mentoring scheme as set out in the Society's policy on mentoring. Applicants should complete this form and return it to the Mentoring Coordinator.*

## Contact details

Name: Dr, Miss, Mr, Mrs, Ms _____

Address: _____

State: _____ Postcode: _____ Country: _____

Telephone (include country & area codes): Work: _____ Home: _____

Mobile: _____ Fax (include country & area codes): _____

Email: _____

## Preferences for contact (please specify as many as appropriate)

☐ Weekday daytime, any day ☐ Weekday daytime, specific days _____

☐ Weekday evenings, any day ☐ Weekday evenings, specific days _____

☐ Weekends, any day/time ☐ Weekends, specific days/times _____

## Indexing training and experience

Please provide details of any indexing courses completed (name of course, duration, trainer/teaching institution, dates) OR details of indexing experience if applicable

_____

_____

Which indexing texts are you familiar with?

_____

_____

## Choice of item to index

Subject area: _____

Special format (e.g. technical report, legal work, biography etc) _____

Description: *Please provide bibliographic details of the item to be indexed. If possible, nominate a first and second preference. For non-monographs, please provide a detailed description of the proposed indexing (e.g. if a series of historical registers, or a journal compilation, provide details of the number, time span, etc)*

_____

_____

## Application fee

An application fee of A$250.00 per mentoring item must accompany each application. Once a proposal is accepted into the mentoring scheme, this fee is non-refundable.

☐ I attach a cheque or money order for A$250.00 made payable to the Australian & New Zealand Society of Indexers

OR

☐ I am paying by credit card: ☐ Mastercard ☐ Visa

Card number: _____ _____ _____ _____ Expiry date: _____ / _____

Name on card _____

Signature _____

**Declaration**

I declare that

☐ I am a financial member of ANZSI

☐ I am not a Registered Indexer

☐ I agree to abide by the provisions of the Mentoring Scheme as set out in the Society's Policy on Mentoring

Signature: _____ Date _____

***Thank you for your application. Once accepted, a receipt will be forwarded for your tax records.***

**Please send this form and payment to:** Mentoring Coordinator
Australian and New Zealand Society of Indexers
GPO Box 2069,
CANBERRA ACT 2601
AUSTRALIA

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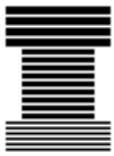
OFFICE USE ONLY

Application accepted _____ Education Committee advised _____
Mentor assigned_____ Letter of congratulations sent _____
Project start date _____ Feedback and evaluation form sent _____
Index completed _____ Feedback and evaluation form returned _____



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# ANZSI Mentoring Scheme
# Mentor Enrolment Form

*Thank you for your interest in being an ANZSI mentor. A mentor of a book index must be an ANZSI Registered Indexer. In cases where the skills of database indexing would be useful (for example in mentoring a journal compilation), an experienced database indexer may be a mentor. To enrol as a mentor, please complete this form and return it to the Mentoring Coordinator.*

## Contact details

Name: Dr, Miss, Mr, Mrs, Ms _____

Address: _____

State: _____ Postcode: _____ Country: _____

Telephone (include country & area codes): Work: _____ Home: _____

Mobile: _____ Fax (include country & area codes): _____

Email: _____

## Preferences for contact (please specify as many as appropriate)

☐ Weekday daytime, any day ☐ Weekday daytime, specific days _____

☐ Weekday evenings, any day ☐ Weekday evenings, specific days _____

☐ Weekends, any day/time ☐ Weekends, specific days/times _____

## Areas of subject expertise

☐ I am happy to mentor in any subject area

☐ I am happy to mentor any format of index (eg technical report, annual report, biography, looseleaf, database, etc)

OR

☐ I prefer to mentor in the following subject areas (please specify) _____

☐ I prefer to mentor specific types of formats (please specify) _____

_____

## Declaration

☐ I am a financial member of ANZSI
☐ I am a Registered Indexer
☐ I agree to abide by the provisions of the Mentoring Scheme as set out in the Society's Policy on Mentoring.

Signature: _____ Date _____

***Thank you for supporting the ANZSI Mentoring Scheme.***

**Please send this form to**:

Mentoring Coordinator
Australian and New Zealand Society of Indexers
GPO Box 2069
CANBERRA ACT 2601
AUSTRALIA

OFFICE USE ONLY

| Date | Mentee | Work indexed |
|---|---|---|
| | | |
| | | |
| | | |
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| | | |
| | | |

Date received _____

# Language on the move

**Pam Peters**

*Dictionary Research Centre, Macquarie University, Sydney*

***Abstract***

*Language variation goes on around us all the time, in the spellings and meanings of words. Some of it – but not all – will result in permanent change to details of the language. One powerful force in language change is assimilation, effectively the tendency of isolated and borrowed words to line up with larger paradigms. This paper looks at a series of examples of English borrowings from classical languages, e.g. the spelling of words like 'h(a)emoglobin' and plurals of words like 'retina', to show the ongoing process of assimilation that underlies the surface variation. The variable forms of words have some impact on the alphabetisation of words, and on indexing that looks beyond the spellings used in the author's text, so as to support multiple points of entry to the index.*

# Oxford English Dictionary

**Sharon Gray**

***Abstract***

*Reading of article published (16 April 1989) in* The Guardian *by Richard Boston on how the 20-volume* Oxford English Dictionary *(OED) came into being.*

# Report: Health and Wellbeing session

**Jenny Restarick**

On Saturday morning, we had a Health and Wellbeing class/entertainment for the benefit of all our sore and aching necks, backs and shoulders, caused by an indexer's usual working mode, i.e. sitting for hours on end.

Jenny Davrain (fitness instructor)

Jenny Davrain, a wonderful phys ed instructor, took us through 45 minutes of warm-ups, stretches and bends, and then cool-downs whilst we, challenged by varying degrees of difficulty in holding 2 cans of baked beans, sweet corn, pineapple pieces etc., or 2 bottles of tomato sauce or 2 packs of long spaghetti, worked on every part of our bodies and even some we had forgotten we ever had. We were cajoled into pointing our F for feet, turning our A for ankles, holding onto the back of our chairs and attempting some L for lunging exercises.

It was all great fun, and prizes were awarded in the following categories:

- the most dangerous person in the room;
- the woman who undid the bottom 3 buttons of her dress and kicked off her shoes;
- the woman whose strenuous workout close to me without touching earned her high points; and

- to those in the front row whom everyone else could see and laugh at.

Also receiving special mentions were Pam Peters for being such a supporter of this session and literally throwing herself into action; and our Iranian colleague, Saeed Rezaei Sharifabadi, who managed to complete the exercises, take numerous photographs of these mad people and laugh uproariously all at the same time.

Let's hope some of the movements have remained in the mind, and we can all continue to benefit from them at home.

Participants who were unable to carry their cans and bottles home will be pleased to know they have been given to a local charity for distribution in food hampers.

Indexers who shall remain anonymous

# The database in your future

**Jon Jermey**

***Abstract***

*Most indexers use specialised software to produce indexes, but the output is still a relatively unstructured free-form document. As editors, publishers and ultimately readers grow more computer-literate and data-oriented, their expectations will move away from indexes as text and towards more structured, multi-purpose 'indexes' which can be combined, filtered and manipulated electronically in sophisticated ways. The tool of choice for working with this new kind of index will be a database management system. Within a few years database literacy will be as important to the working indexer as word processing skills are today.*

*This paper introduces some of the theory behind databases and looks at a range of database applications, from relatively simple text manipulation, through XML output and on to the preparation of material for distributed information collection, search and editing on the web.*

## Introduction

I started my career as a computer trainer more than twenty years ago. At that time there was a lot of resistance to computer use, and in almost every class, amongst the students who were keen and enthusiastic there would be one who wouldn't have been there but for outside pressure – from family, friends, colleagues or a supervisor. Most of them still got through, though – in fact out of ten thousand or so students I can only remember three or four who simply gave up.

I was fairly young then and I naively believed that once someone was using a computer their fear of the new would be over. I soon learned otherwise. As time has gone by I have had a long parade of students through my classes who are using computers – but not very well. They have a set repertoire of things they can do efficiently enough to keep them in work; but faced with a new challenge they don't know where to start. They have a phenomenally powerful tool at their disposal but they can't or won't build on what they already know to use it better. It's as if they had a jet fighter, and they only ever used it to taxi down the road and buy groceries.

And ironically it's actually much harder to get a computer user to try something new than it is to get a non-user on to the computer in the first place. It takes lots of pressure. The enormous

uptake of the Internet, for instance, has largely come from social pressure. I suspect the next big skill upgrade will be due to financial pressure, as more and more employers require better and better skills. In fact there are signs that this is happening already.

We as indexers are not immune to this pressure. Paper document production is complicated, slow and expensive. Electronic document production is relatively quick and cheap. Many publishers are already routinely sending PDF files to accompany their galley proofs. Others are experimenting with electronic markup systems so that material can be repackaged electronically in many different forms. As documents change, indexers will be asked to do many new and different things. One of these will be to understand and work with records in a variety of ways. In short, a fundamental understanding of database operations will need to be part of every indexer's toolbox.

In this talk I want to introduce some of the basic ideas behind electronic databases and examine four situations where they have been of value in indexing operations. These range from very simple text manipulation through to complex web-based information retrieval. I will be using the Microsoft Access database system as an example, but the same concepts apply to most other database applications.

## Database concepts

The word 'database' is fairly vague, but it typically refers to a single set of independent records, or several connected sets. The word *independent* is important here: in a normal database each record is quite separate to all the others. It can be removed and new records can be added, without affecting the basic structure and function of the database system. This is not true of some linguistic databases, for instance, where every word is connected to every other word in various ways.

A set of records is called a *table*. Thus in a company database there might be a table of departments, a table of job classifications and a table of employees. These tables can be *linked*: for instance, every employee record links to that employee's job classification and their department details. This means that if we know Sally Jones is a Grade II Secretarial Assistant, we can see immediately what Sally's job description is and where she works. A database with these kinds of links is known as a *relational* database.

The items in a record are called *fields*. Fields have names – Surname, Employee Number, Date of Birth and so on. They also have *types*, which determines what you can do with the field: for instance, a numeric field like Salary could be used to calculate average salaries or total payroll, while a text field like Surname would mainly be used for searching. One important field in most tables is the ID field. This provides a unique number for each record and helps prevent Sally Jones in Marketing, for instance, being mixed up with Sally Jones in Personnel. *Memo* fields allow large amounts of text – an employment history, for instance – to be associated with a single record.

Information can be entered directly into a table, but in the long term it is usually better to design and use a *form*. This is usually a screen-sized panel in which the information for any one record is laid out for viewing and entering. Forms can be used for *error-checking*; for instance, a field for the employee's date of birth might give an error message and refuse to

accept the data if a date earlier than 1940 or later than 1990 is entered. Forms may also contain *subforms* showing linked data from other tables.

Information is extracted from the database by means of *queries*. These allow the user to specify: a) the type of records to extract; b) the fields to include; and c) the sequence of the records. Where tables are linked, queries can extract information from two or more of them at once. Thus a query to extract information on all female employees under 30 might show their names, departmental locations and federal award number, all sorted in order of employee date of birth.

Finally, the output from the database may take the form of a *report*. This is a formatted list of records, often broken down into groups and subgroups, sometimes containing totals or other summary information for the groups and subgroups. Although this is designed for printing it can be sent to Word or Excel and subsequently manipulated into HTML, XML or other kinds of output.

## Example 1: Text manipulation

So much for the basic concepts. I want to start the practical examples with a task which many of us have been called on to do from time to time. In this example we have a text file containing a list of names in this form:

Sally Jones
Thomas Ling
Walter Brackett
Henrietta Grey

and we need to convert them to this form:

Jones, Sally
Ling, Thomas
Brackett, Walter
Grey, Henrietta

There are many ways to approach this, of course; but one advantage of doing it in Access is that the query we use can be stored and used again at any time in the future when the same situation arises.

Here are the steps:

1. Import the text file in to Access, where it appears as a table.

2. Design a query as follows:

    a. Column 1 of the query is the list of names

    b. Column 2 is the numerical position of the space in each name: the formula for this is **SpPos: InStr([Name]," ")**

c. Column 3 is the length of the name: the formula for this is **LengthName: Len([Name])**

d. Column 4 is the set of characters to the right of the space: that is, the surname. The formula for this is **Surname: Right([Name],[LengthName]-[SpPos])**

e. Column 5 is the set of characters to the left of the space: that is, the first name. The formula for this is **FirstName: Left([Name],[SpPos]-1)**

f. Column 6 is the concatenation of columns 4 and 5 with a comma and a space between them: **FullName: [Surname] & ", " & [FirstName]**

3. We can run the query at any time to check the results, and once we're happy we can save the result as a new table, export it to a text file or simply copy and paste it into Word or Notepad for further work. The query itself also can be saved and called up again to be used when you have the same problem.

This example can be extended to many kinds of text manipulation.

## Example 2: A Do-It-Yourself Thesaurus System

More and more companies are developing thesauruses for their knowledge management needs. But it's relatively easy to develop your own thesaurus using a database system. If all you want is a simple system to control what you're allowed to enter into a field then Access can do that for you very quickly.

Here's the example:

1. I've taken a simplified version of the APAIS thesaurus and given it four columns: an ID column, a Term column, a Preferred Term column and a Broader Term column. This is stored as a table in the same database file as a table containing details of a large number of articles. In this case I've used a list of some of the articles that my partner Glenda Browne and I have written for *Online Currents*. The job is to assign each article one keyword from the term list.

2. The table containing articles has a column for the title and a column where the index term will go. This is currently blank. In designing the table I can create a link to the thesaurus so that only terms from the thesaurus are allowed in this column. This is done through something called the Lookup Wizard.

3. If I now create a form based on the Articles table it displays the items in the thesaurus table as a drop-down list, and I can only choose from the items on that list. And it supports type-ahead, making it easy to search.

4. One very useful thing we can do with forms is to write little programs that help us check our data. I've written a program which I'll attach to a button on the form. The program will look at the term in the thesaurus list and check whether

it has a preferred term. If so, it will substitute the preferred term for the current one. The program itself is fairly simple, although it took a lot of trial and error to get it working:

```
Private Sub cmdLookupPreferred_Click()
   Dim PrefTerm As String
   On Error GoTo StopHere:
   Keyword.SetFocus
   Keyword.Text = DLookup("[Preferred Term]", "APAIS MiniThesaurus",
        "ID = " & Form![Keyword])
   Exit Sub
StopHere:

End Sub
```

## Example 3: A PHB Super-index

The first example could have been set up in a couple of minutes. The second one took a couple of hours. Our third example is a complex system which was developed over several months to meet the requirements of the NSW Department of Health, who asked us to prepare a set of indexes to their *Public Health Bulletin*. This is a monthly publication, and we began with ten years worth of unindexed journals from 1990 to 2000, and then went on to include each new year's material as it arrived. At the time that we began they were putting PDF copies of the publication up on their website, and later began to put up articles as separate HTML files.

Before we look at the system itself I want to go through the output that was required of us:

- A printed author index for each year
- A printed subject index for each year
- A cumulative hyperlinked index of authors for the web
- A cumulative hyperlinked index of subjects for the web
- A listing of the contents of each issue in XML format for inclusion in a searchable database.

We had a look at the variety of output required and decided that a dedicated indexing program wasn't going to be able to handle it. So we gradually developed this Access application. There are a large number of tables and the tables are all linked together in a way shown in the Relationships window. There are lots of queries including some Update queries that actually change the data – some of these remove the first word of titles that start with The and A, for instance.

There are many forms and subforms but the main two forms are those allowing us to add new volumes and new issues, and to add and edit articles. There are lots of queries and reports, and

a little bit of programming in the background of the forms. The reports, of course, are where the main output comes from, and if we look at these we can see one of the drawbacks of Access; because it's designed for printed output it automatically truncates lines where the margin of the page would be: so in order to get all our text appearing we have to make it very very small.

## Example 4: A website database

The last example moves the functions of Access out from the individual PC and on to the Web. This relates to a database of our work that we have compiled over the last few years and put up on to our website. The public side of this can be accessed from our home page. It includes a page showing the indexes that we have compiled and a page showing the articles that we've written. At the moment these are browsable; we could also make them searchable if necessary.

The private side of the site is where we can update the information. Here we can enter new indexes and new articles, and if we make a mistake we can call up a record and delete it or change it. The 'back end' where the data is stored is a plain Access database and the searching and modification of the database is done through a programming language called ASP. ASP is fairly complex but luckily the user doesn't have to write it themselves if they have the Dreamweaver web authoring package because this comes with built-in ASP code.

## Conclusion

By now you've been given an overview of what a database package can do, and hopefully you can see some applications of this to your own situation. Those of you who are using SKY Index may be surprised to know that you are using a database package already, although a fairly specialised one: SKY Index is written around the Microsoft Access database engine, and in fact if you change the extension on a SKY Index file to .mdb you can open it in Microsoft Access and tinker with the contents.

So let me just finish with the main point I started with: the computer on your desktop has tremendous capabilities, and more and more employers and clients are becoming aware of that, and raising their expectations accordingly. As time goes by we are going to be asked to do more and more – with spreadsheets, with databases, with HTML and XML, with the Internet – and those of us who can't or won't do it are going to be left behind. The database in your future is approaching rapidly: will you be ready for it when it arrives?

# Maxus: a live demonstration of the use of database and thesaurus management software products in the construction of a database index

**Andrew Pentecost**

*Maxus, Melbourne*

***Abstract***

*This presentation will discuss the theory involved in the construction of a database index. The presenter will illustrate the steps involved in database indexing via the use of database management software and thesaurus management software. The processes demonstrated will provide some concrete examples of the construction of a thesaurus, the use of that thesaurus in the indexing of database records, and the publication of the searchable thesaurus and searchable database in a web or intranet environment. The presenter will draw on his library-based experiences with the creation of a major database index and his more recent experiences as a software vendor.*

# A study on the feasibility of subject authority control of web-based Persian medical databases: an Iranian experience

**Saeed Rezaei Sharifabadi, Ph.D**
**Abdollrasoul Khosravi**
**Mohsen Haji Zeinolabedini**

*Alzahra University, Vanak, Tehran, Iran*

## Abstract

*One of the most important factors challenging the issue of 'information storage and retrieval' in the Internet environment is the lack of authority control, including subject authority control. The present research aims at examining the feasibility of introducing subject authority control over Persian medical databases available on the Net. Based on research methodology, we have chosen 50 keywords at random from keywords utilized by users who searched these databases for articles. In the pre-test stage, these keywords were searched in Iranmedex, a database for Persian medical articles. The keywords utilized by database users were compared with Persian Medical Thesaurus and those which exactly matched with terms in the thesaurus were entered in a database specially designed using Microsoft Access software. In the next stage, we entered these authorized keywords in Iranmedex. Findings derived from these new search sessions revealed that control of authorities makes information retrieval more precise and accurate. It also prevents false drops. It is suggested that the resultant research findings could be used for modifying the process of information storage and retrieval on the Internet. The research concludes with a model for applying thesauri as authority control tools for other databases available on the Internet.*

## Introduction

Organization of information has long had particular importance in the library and information science literature, whether produced manually or digitally. A historical glance at the process of information organization demonstrates that librarians have always been responsible for organizing information resources by various methods and/or tools such as cataloguing and indexing.

The Internet developments present new challenges for library and information professionals with regard to the organization of information. One of the most significant challenges is to bring closer the language of information providers and users.

In the present study, we examine the issue of 'authority control' in the Internet environment by concentrating on a significant Persian medical database, Iranmedex. Based on research findings, we address how to use thesaurus as a tool for authority control and make it suitable for the new environments.

## The Problem

Due to the ever-changing and developing nature of the Internet and web-based technologies, a web-based medical database has the potential to be an invaluable resource for users wanting to include the most recent medical information in their work. However, regarding the relevancy of information, the Internet and world-wide web have caused several problems for users.

One of the major challenges in information retrieval research is to bridge the gap between the information user's language and language that evolves in the literature. On the one hand, authors and information producers express their thoughts by their own language and vocabulary; on the other hand, information users / seekers look for information through their own language and vocabulary. In other words, language of information users/seekers is not correspondent and compatible with those of information providers'. Unlike phrase or title searching which have a precise and clear answer, such as searching for the title of a book or an article, subject and / or keyword searching, in which users look for information 'about' something, have not a given and / or direct answer. Therefore, one of the main information retrieval problems is to select relevant keywords to meet users' information needs. This gap between information providers and users can be bridged through the use of information storage and retrieval tools.

Authority control has enabled librarians to catalog library items with similar or identical headings. But, there are still unsolved problems in controlling the Internet environment. Designers of websites, databases and search engines can use librarians' solutions and experiences in order to provide a useful environment for access to digital information through the internet. Using authority control tools for Persian resources is a method that Internet information providers can employ for retrieval of more relevant information by users of research sources in the Farsi language.

# Research questions

1. What Persian medical databases are available on the Internet?

2. What methods are used by Persian medical database users to retrieve relevant information?

3. How effective is Persian medical thesaurus in retrieving information?

4. What problems are users having with Persian medical databases?

5. What equipment and resources are needed for making the most use of subject authority control tools in the Internet environment?

## Authority control

Authority control is defined as 'the consistent use and maintenance of the forms of names, subjects, uniform titles, etc., used as headings in a catalog. Since this process creates a link between bibliographic records and the authority file, authority control provides the underlying structure of the catalog' (Greenblatt, 1995). In fact, authority control is a method for eliminating shortcomings and deficiencies affecting information retrieval using natural language and /or vocabulary. Authority control is a way of assuring a catalog's maximum usefulness to both library staff and patrons. It is affected by such factors as how people communicate and the need for standardization. The main purpose of authority control is to allow diverse people with diverse needs to find information in one organized place. In general, authority control has the following goals:

1. In order to retrieve a subject or name easily and fast, always one fixed and uniform term is used;

2. Related concepts and their relationship type are somehow distinguished;

3. Users always become familiar with the more idiomatic and fixed form of a subject or a name;

4. Words and terms which have two or more meanings are controlled and so when information is retrieved conceptual disorders are prevented;

5. Retrieving all a certain author's works through the same access points (or under the same headings) is insured;

6. Entering only this same author's works under a given heading is ensured;

7. Saving in time and energy needed for cataloguing this same author's new work and so creating a new heading is prevented (Haji Zeinolabedini, 2005).

## Authority control in the digital environment

Considering authority control goals and functions, there are particular issues that present challenges in the new digital environment. For instance, some librarians reject the importance of creating name authority files in the new environment, while others argue that creating a name authority file in the digital environment is still a necessity. Although many search tools and strategies such as 'Boolean operators' and 'Keyword searching' have been created, none of them can replace authority control.

In recent decades, Library of Congress and many large libraries have made their authority files machine–readable. In addition, in many automated systems, authority files are linked to

bibliographic files and in all records, obsolescent headings are automatically replaced by new headings and cross-references are created or reviewed. However, various studies on authority control and its compatibility with the new environment indicate the significant role of authority control in organizing information (Asadi Karagani, 1999). One of the most important authority files which is provided based on users' need, is the Library of Congress Name Authority File that is accessible online via OCLC, and its new part RLIN. Most US libraries do their authority control activities based on file creation (Haji Zeinolabedini, 2005).

## Basic authority control tools

Among the most common and standard tools for authority control function, the Library of Congress Subject Headings (LCSH), Sears List of Subject Headings (Sears), Library of Congress Name Authority File (LCNAF), and Anglo-American Cataloguing Rules, Second Edition (AACR2 are generally well-known by librarians world-wide. General tools include thesauri, subject headings, name authority files, organizations' authority files and publishers' authority files. The following is a list of some helpful Persian authority control tools:

- Persian subject headings.
- Authority files of authors and well-known personalities.
- Authority files of organizations and governmental institutions.
- Different thesauruses (e.g. ASFA, Medical, Names …).

## Literature review

Shiri (1999) believes that using online dictionaries and thesauri is an effective way of promoting information retrieval systems. He adds that 'the most important advantage of this approach is that we can control users' activities and reactions in a searching process. By using these tools there is no need to have deep knowledge of language and / or a specific subject in order to enter relevant keywords in a retrieval system, although this can be an advantage. This leads to a successful searching and user satisfaction'.

In an article entitled 'The Internet chaos: issues in organization, search and retrieval of information available on the world-wide web', Fattahi (1999a) mentions that 'the best solution to solve information retrieval problems in the Internet environment is to review methods of designing web sites as well as how search engines index and organize the content of information of web sites.' He believes that cataloguing and indexing standards as used by librarians, to a large extent, can solve current problems. As a result, Internet users can easily utilize the ocean of information instead of sinking into it.

In a more recent article, Fattahi (2003) points out that searching and retrieval processes form the main part of new information systems. These systems, for instance offer enhanced and advanced search capabilities to help users create more complex queries. An advanced search allows users to combine a wide variety of search criteria for more precise results, to search a phrase combined with other search elements, to direct the search engine to the particular

element of a web document that users wish to search – its title, URL, text, hyperlinks or all of these, to select time periods for results and specify a language. In his opinion, using relational files (such as subject headings, thesaurus or name authority files) increases the precision rate, usefulness and value of the retrieved information. For instance, a thesaurus of terms helps the information seeker to choose the most suitable terms and to use those terms consistently. In particular a display of the hierarchical relationships of terms can help users to broaden a search or make it more specific. Cross referencing to synonyms will suggest alternative search terms, as will the provision of links to other conceptually related terms. In general a thesaurus helps users to define their search in the terms which are most likely to lead to retrieval of relevant information. Haji Zeinolabedini (2002) in his M.A. thesis examines the issue of vocabulary control. He emphasizes that vocabulary control is used to improve the effectiveness of information storage and retrieval systems. Ideally, he adds, this should be done with the least possible human intervention. In his conclusion, he points out the importance of vocabulary control in accessing to relevant information available on the Internet.

An IFLA study from 1991 through 1996 on the functional requirements of bibliographic records, reported by Madison (1997), identified four generic tasks performed by catalog users: to find, to identify (i.e., collocate), to select, and to obtain access. Although Cutter identified the first three over 100 years ago as functions of the library catalog, technological advancements over the past 20 years have vastly changed the parameters of these functions. Oddy (1996) pointed out that the second objective of the catalog, i.e., to collocate works by an author and manifestations of a given work, is becoming more important 'as we move away from concentration on the published unit as the building block of the collection and of the catalog'. She observed that the card catalog has limited us to pre-coordinate linking devices. So our concepts of main and added entries basically mean that we still conceive of the access points as though they are bound by the limits of the printed catalog. The computer, however, has made these notions obsolete. The fourth use of the catalog identified in the IFLA study, i.e., to obtain access, is a new function that is the direct result of digital technologies. Catalog records can now contain hypertext links to digital documents, which may be held locally or on a remote server. In other words, the catalog is now able to meet the growing expectation of providing access to the full documents rather than just surrogates of those documents.

Information seekers, however, will be disappointed with the catalog if they expect to find access to the full universe of information on the World Wide Web. Lynch (1998) said that many people perceive the Web to be a worldwide digital library and expect Web search engines to be the online catalogs of the future. He said these notions are not likely to become reality because of, among other things, quality issues, both in terms of the content of the resources on the Web and the retrieval capabilities of search engines. Nonetheless, Lynch pointed out that, today, the problem is not with finding; rather it is that there is too much relevant information. He foresees personalized information and filtering services being provided both by suppliers who offer new kinds of services and by highly intelligent, personalized information access and management systems that are 'the antithesis of a centralized, anonymous-use system like an online catalog'.

Mandel and Wolven (1996) point out that digital documents contain information that allows us 'to exploit the content of the document itself as a means for access'. Although they acknowledge that the traditional requirements for a useful access system (i.e., author identification, controlled subject vocabulary or classification, version control, and genre identification) are likely to be lacking in many digital documents, Mandel and Wolven

suggest that software tools and new technologies may work with us in the future to locate or prepare these identifiers.

Gorman (2004) emphasizes the necessity for authority control in 'bibliographic architecture' and expresses concern about the lack of adequate control over most electronic resources. Web resources present a new challenge to information organizers in deciding which documents to catalog. Gorman suggests two solutions to the problem of a lack of adequate control over electronic documents: (1) If metadata is to be enhanced to meet the traditional standards of cataloging, it will require the use of skilled, experienced catalogers and the related investment of sufficient time and money to yield high-quality results. (2) Most electronic documents should not be catalogued. Decisions need to be made about how to identify documents worth cataloging and about how to preserve those documents. Gorman (2004) concludes that a system containing authority control is better than one does not have it. He also points out the creation of authority files in the internet environment.

Tillett (2004) reminds librarians of 'the opportunities that libraries have to now contribute to the infrastructure of the future Internet environment'. She adds that 'We can envision a shared international authority file being an integral part of a future 'Semantic Web … Here's where libraries have an opportunity to contribute to the infrastructure of the future Web – we already have controlled vocabularies in our various authority files. Those would be linked with other controlled vocabularies of abstracting and indexing services, of biographical dictionaries, of telephone directories, and many other reference tools and resources to help users navigate and to improve the precision of searches, so users could find what they're looking for'. She foresees that 'The availability of millions of authority records worldwide, multiple automated national and regional authority files, and the technological capabilities of the Internet and protocols are all coming together now, and we are really at the brink of making a virtual international authority file a reality.

In a book entitled 'Authority Control in Organizing and Accessing Information: Definition and International Experience' co-edited by Taylor and Tillett (2004), several projects are identified, that are moving the information science professions in the above direction.

# Methodology

The first stage of the present research was to identify available Persian medical databases. Retrieving the Persian databases was not methodologically possible because the Persian domains are not separately flagged on the Internet. Hence we approached experts in the field of medicine who were familiar with searching in the Internet environment, for the names of target Iranian sites. Overall, we identified the following relevant databases:

1. Directory of Iranian medical articles (Iranmedex)
2. Iranian scientific magazines and articles (Ismages)
3. Pars Medline
4. Scientific information database (SID)

The next step was to examine the features and capabilities of these databases. Table 1 compares the four databases studied.

**Table 1:** Features and capabilities of Persian medical databases

| Database | Advanced search | Medical Journals | Full-text articles | User Guide | Vocabulary database | Cost | Statistics about use of site |
|---|---|---|---|---|---|---|---|
| Iranmedex | * | 80 | 8347 | * | - | * | * |
| Parsmedline | * | 73 | 4000 | * | - | - | - |
| SID | * | 75 | - | * | - | - | - |
| Ismag | - | 68 | - | - | - | - | - |

As can bee seen in Table 1, Iranmedex has more and better capabilities. This database covers comparatively more Persian journals, more indexed articles and provides access to more full-text articles. This is a good reason why almost all Iranian medical universities and medical information centers subscribe to Iranmedex full-text services. It is necessary to add that Iranmedex administrators are very cooperative and willing to develop the database's features based on user feedback. Therefore, we selected Iranmedex as the main database for the pre-test stage. We also selected the second edition of the Persian Medical Thesaurus, published in 2005, as an authority control tool.

During the research process we had several meetings with Iranmedex administrators explaining the significance, necessity, methodology and current problems as well as shortcomings of the database. Because of the lack of access to the digital version of the Persian Medical Thesaurus, we had to design a database by using Microsoft Access for entering our selected keywords and their relationships.

## Findings

In the pre-test stage, all selected keywords, authorized and unauthorized based on natural language were searched in Iranmedex and the results were recorded. We utilized the 'exact phrase search' capability of the database for our search sessions. Table 2 shows an example of the search results:

**Table 2:** An example of search results in the pre-test stage

| Selected keyword | Keyword type | Articles retrieved | Number of common articles | Overlapping percent |
|---|---|---|---|---|
| Accidents | Authorized | 44 | 1 | 2% |
| Calamities | Free | 6 | 1 | 2% |

In the Persian Medical Thesaurus, the term 'accidents' is a preferred term/keyword and the term 'calamities' is a non-preferred term for the same or a similar concept. As table 2 illustrates, doing a search by each of these terms leads to different results, which, in turn, causes false drops during the information retrieval process.

In order to calculate the proportion of overlap between retrieved articles by selected keywords, we used the following formula:

100× number of same articles = **Overlapping Ratio**
Total retrieved articles

After the pre-test stage, controlled keywords available in the database which we had designed were transferred to Iranmedex. In this final research stage, we repeated our search sessions just as a pre-test stage. Table 3 shows the results:

**Table 3**: An example of search results in the final stage

| Selected keyword | Keyword type | Articles retrieved | Number of identical articles | Overlapping percent |
|---|---|---|---|---|
| Accidents | Controlled | 49 | 49 | 100% |
| Calamities | Free | 49 | 49 | 100% |

As the results in Table 3 indicate, searching by each one of controlled and free keywords led to the same result, i.e. full overlap (100%) of retrieved articles regardless of the type of keyword used.

In Table 4, there are more controlled/preferred keywords along with common uncontrolled/ nonpreferred keywords utilized by users. These terms were searched by users both in pre-test and final stages.

**Table 4:** A more comprehensive breakdown of search results in the pre-test and the final stage

| No. | Keywords | Keyword type | | Retrieved articles | | Number of identical articles | | Overlapping percent | |
|---|---|---|---|---|---|---|---|---|---|
| | | Free | controlled | Pre | Final | Pre | Final | Pre | Final |
| 1. | Hepatitis | | * | 226 | 226 | 0 | 226 | 89% | 100% |
| 2. | **Liver inflammation** | * | | 2 | 226 | 0 | 226 | | |
| 3. | Parasites | | * | 98 | 98 | 3 | 98 | 3.07% | 100% |
| 4. | **Hanger-on** | * | | 3 | 98 | 3 | 98 | | |
| 5. | Ophthalmology | | * | 6 | 117 | 1 | 117 | 86% | 100% |
| 6. | **Optometry** | * | | 112 | 117 | 1 | 117 | | |
| 7. | Black leprosy | | * | 22 | 22 | 1 | 22 | 4.34% | 100% |
| 8. | **Hansen's disease** | * | | 1 | 22 | 1 | 22 | | |
| 9. | Sclerosis | | * | 11 | 169 | 4 | 169 | 2.31% | 100% |
| 10. | **Induration** | * | | 162 | 169 | 4 | 169 | | |
| 11. | Jaundice | | * | 48 | 93 | 6 | 93 | 6.06% | 100% |
| 12. | **Chlorosis** | * | | 51 | 93 | 6 | 93 | | |

Table 4 indicates that applying authority control in Iranmedex database leads users to the same results. For example, in the pre-test stage, searching 'jaundice' and '*chlorosis*' as two synonymous keywords resulted in retrieving 48 and 51 articles, respectively. In this stage, there are only 6 articles in which both keywords (jaundice and *chlorosis*) are appeared. Therefore, if users were unaware of the difference between two keywords, by searching each of them they could miss more than 50% of the relevant articles available in Iranmedex. Of

course, this loss is unacceptable and undesirable. It is also a sign of database retrieval system inefficiency.

After modifications made to the database, searching the same keywords in the final stage as shown in Table4, led to a 100% retrieval efficacy, i.e. full overlap between retrieved articles by two synonymous keywords. This means that users, for example, can search either jaundice or *chlorosis* to retrieve all related articles.

## Retrieving information from Persian medical databases: Issues and Problems

The main issues and problems include, but are not limited to:

1. There is no vocabulary control or authority control, therefore a significant difference exists between the results of controlled and free keyword searching.

2. Often, search results are less relevant or irrelevant to the search terms. There could be several reasons for this, but the most common would be as follows:

    - The vast amount of information which is available in electronic form today without any standard indexing system.

    - Lack of a unified indexing scheme for all relevant materials, regardless of type or source.

    - Unavailability of a standard thesaurus for indexing Persian medical databases, which forces indexers to use the same terms from the text for indexing purposes. Obviously, authors prefer to use their own favourite terms instead of a thesaurus preferred terms, regardless of any relationships between terms.

## Subject authority control in Web-based Persian medical databases: needed resources

The major resources needed include people, equipment, and money. We will discuss these three resources in more detail.

### 1. Manpower

In order to obtain more useful and/or relevant results from the Persian medical databases, it is essential to employ more expert and/or knowledgeable database designers. Besides, there is a vital need to consult with more medical experts for thesaurus construction and development. Librarians and information scientists can also provide a bridge between computer scientists, linguistic experts, and subject specialists. Librarians can teach others to use thesauri efficiently. The present research revealed that designers of Persian medical databases have not already taken the opportunity to consult with librarians. Therefore, they were not familiar with medical thesauri and the way in which they can be used for authority control purposes.

### 2. Equipments

The main equipments/tools needed for subject authority control in Persian medical databases includes:

**Persian medical thesaurus**
There is no doubt that without a Persian medical thesaurus there is no hope for true subject authority control. Fortunately, a reasonably comprehensive Persian medical thesaurus was published by librarians and information scientists of the National Library of Iran a decade ago. In its second edition, published in 2005, the editors resolved many of the drawbacks of the first edition.

**Software**
Powerful software is necessary with 'exact phrase searching' capabilities. It should also help users to retrieve relevant articles by using an updated medical thesaurus.

### 3. Budget

Of course, budget is always a key consideration as well, and plays an integral role in the prioritization process. Budget is needed for developing a national subject authority database, updating the Persian medical thesaurus, and consulting with experts in various fields. Such investments can significantly enhance the quality of scientific research and productivity.

## Conclusion and suggestions

The major findings of the present research largely confirm that there is a difference between retrieving needed information from Persian medical databases by controlled vocabulary and free keywords. This difference arises from the use of various terms by information producers and information seekers. Information producers express their thoughts by means of their own terms/vocabulary while information seekers do not use the same terms. Library and information science professionals are responsible for bringing closer together the vocabulary of information producers and users. Using useful tools such as thesauri and subject headings can help librarians to achieve this goal. Comparison between printed and electronic databases indicates that electronic databases offer the most promising search capabilities. In terms of comprehensiveness, the Internet is a good example, however, precision in the Internet environment is inversely proportional to recall i.e. if precision increases, recall decreases and vice versa. Lack of authority control in the internet environment leads to retrieval of irrelevant information and misses many relevant resources. We found that using authority control tools can solve many information retrieval problems in an online environment.

If web-based information systems are indexed and stored with a standard thesaurus as a basis, users will not face the same problems during their retrieval process. Results of the present study also showed that although the Persian medical thesaurus has not been utilized for storage and retrieval of medical information in an online and/or computerized environment, it can be used properly to apply authority control in online as well as computerized environments.

It should be noted that by authority control we can help to improve the quality of databases and provide users with their needed/relevant information.

Finally, we end this paper with the following suggestions:

1. That all Persian medical databases make use of the Persian medical thesaurus for subject authority control in the indexing of their information.

2. That, in cooperation with database designers, the Iranian National Library prepare a subject authorized database based on standards which are consistent with the web-based environment.

3. Regarding the role and significance of authority control in information organization, this subject should be included in all related academic LIS courses and/or syllabuses.

4. In order to meet users' needs, designers of medical information systems could prepare a smart list of basic accepted vocabulary in their databases at the time of data entry so that the issue of 'authority control' can be applied as well as executed more easily.

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# Business basics for freelance indexers: what to do before and after you hang up your shingle

**Renée Otmar**

***Abstract***

*This short seminar, based on a two-day program by Renée Otmar and Sally Woollett entitled 'Successful Freelancing', is designed to help you consider the formal aspects of running a freelance business. The session will be interactive and will draw on participants' own experience as well as documented evidence from research. We will touch on a range of business and professional skills, from the day-to-day aspects of business administration to higher-level activities such as business planning for growth and success. Topics will include:*

- *quoting, payment and record keeping;*
- *taxation and insurance essentials;*
- *building and maintaining your business;*
- *career and business planning;*
- *marketing your business.*

*This seminar will be of interest to new and experienced indexers who are starting up or thinking of starting up a freelance business.*

# Indexing manuscripts and the Koorie Index of Names (KIN) Project

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***Abstract***

*Archival records now in the custody of Public Record Office Victoria (PROV) may be the only documents still in existence that provide indigenous people with information on their ancestors. In 2005 PROV established the Koorie Index of Names (KIN) project. and PROV shares an indigenous Aboriginal indexing officer with the National Archives of Australia (NAA). With the assistance of indigenous volunteers various government record series are being indexed for person name data so that those seeking to find their ancestors will have easier access to the records. The project faces challenges on a number of fronts, among them: how to read the old handwriting, the unfamiliarity of indigenous names and dialects, spelling changes, the illiteracy of those providing information to government officials who recorded what it sounded like, faded hard to read handwriting and fragile pages with information missing are just some of these challenges. The KIN project is part of a much larger program to make access to records easier for indigenous people. This paper addresses the challenges of indexing archival records, working with volunteers and providing access to name identified data for indigenous people*.

## Public Record Office Victoria (PROV)

PROV was established in 1973 as Victoria's archival authority and has responsibility for the preservation of state government records for permanent retention. PROV holds these government records in custody and makes them available for historical, genealogical or other research purposes, and to maintain public records that document the status, rights and entitlements of Victorians. PROV holds records created by state government authorities, such as courts, local

councils, schools, public hospitals and other public offices. The records date from the mid-1830s onwards and include information on topics as diverse as immigration, land, education, health, prisons, Aboriginal people, public buildings and so on. While PROV's primary users are family historians and genealogists, major researcher groups include local historians, hobbyists (especially train enthusiasts), teachers and students, tertiary students and academics, professional historians, authors, journalists, architects.

### Koorie Records Unit

One of the specialist areas at PROV is the Koorie Records Unit (KRU). The role of the KRU is to promote awareness of records regarding Aboriginal people held at PROV and to improve access to these records. The unit provides advice and assistance to researchers and works closely with the National Archives of Australia (NAA) on Koorie projects.

PROV has a number of publications that are of assistance to Aboriginal people trying to reconnect with their families. *Finding Your Story: A Resource Manual to the Records of the Stolen Generations in Victoria* was published in 2005 as both a paper print publication and also online via the PROV website where it can be freely downloaded. *Finding Your Story* provides detailed information on where records may be found which may contain information about indigenous Victorians separated from families and their time in the care of others. It identifies what records are available and how to access them as well as providing background to the policies and practices behind the separation of families and communities.

*Wilam Naling: Knowing Who You Are* is a report to the Victorian Government from the Koorie Records Taskforce about improving access to records of the Stolen Generations. Recommendation 2 of the Report is that PROV undertake an indexing project of all relevant Victorian records in its custody to produce a Koorie name index. Before looking at that project in detail, it might be useful to look at some of the challenges of indexing archival records.

## Challenges of indexing

As the records are so old, they are usually fragile, hard to read and the edges of the documents may have crumbled. Often they have been damaged by water damaged and inks have run or faded. The difficulty in reading the handwriting and the fragile nature of the records means that indexing can be a slow and time-consuming process. The majority of archival records, particularly for from the 18th and 19th centuries – often the records of most interest to researchers – are handwritten and interpreting them requires special care. There are a number of potential traps. Over the years, for example, the spelling of some words has changed. Even more of a problem is that many people were illiterate and government clerks wrote their names down as they sounded and not as perhaps they should have been spelt. In some handwriting, certain letters are indistinguishable, for example e.g. Fl and H, which could be read either can be as Flannery or Hannery. The double ‘ss’ often looks like ‘p’ or ‘fs’, for example, Miss looks like Mifs. Other likely uppercase mix-ups include S and L; C and O; I and J; M and W, to mention just a few. With lowercase writing the ‘m’ and ‘n’, ‘e’ and ‘i’, ‘o’ and ‘a’ can be problematic. It can also be extremely frustrating trying to decipher cryptic abbreviations. Experienced indexers have learned, often the hard way, that it is not always possible to index a handwritten record quickly. At PROV we have often had a spirited discussion about what a word really is.

# Koorie Index of Names (KIN) Project

## Purpose

The KIN project is aimed at providing better access to Aboriginal records for all Aboriginal people. However, particular attention has been given to improving access to records access has also been a focus for members in relation to the Stolen Generations. Aboriginal children in Australia have been forcibly removed from their families and communities since the very first days of European occupation. Those who were forcibly removed children have become known as the Stolen Generations. They are a separate group within the Australian Aboriginal population, as they had experiences, losses and outcomes in life that set them apart from most other Aboriginal people. Their losses and grief have set them apart in important ways.

The issue of Aboriginal access to records has been a high priority in Victoria since the publication of the *Bringing Them Home* report in 1997. It is widely acknowledged that access to records needs to be improved so that people removed from their families as children can view crucial information that can be vital to help them reconnect with family and their community, establish identity and progress along the journey of healing. Since 2001 the Victorian Government and the wider archival community have been working together to address these issues.

This paper explores the difference an indexing project can make to a community or generation. Examples are drawn from the work Public Record Office Victoria (PROV) and National Archives of Australia (NAA) have conducted in relation to indexing projects.

## Records

The difficulties and importance of accessing Aboriginal records was first recognised formally in the report of the 1991 Royal Commission into Aboriginal Deaths in Custody (Royal Commission into Aboriginal Deaths in Custody, 1991). Records can assist to reinstate pride in family experiences, reaffirm interaction with broad family networks, help to revive and maintain Aboriginal traditions, provide an understanding of the historical background of contemporary personal issues and can lead to the re-claiming of ownership of material pertaining to family life (Human Rights and Equal Opportunity Commission, 1997).

Since the Royal Commission and the 1997 *Bringing Them Home* (BTH) report a great deal of work has been carried out by PROV and NAA in making access to Aboriginal records easier. In Victoria, this combined effort is vital because the records of the Board for the Protection of Aborigines records, and its successor agency better known as the Aborigines Welfare Board, were being divided between the Victorian state (PROV) and Australian federal (NAA) archival collections.

To access the early official government records, (up to 1860), relating to the administration of Aboriginal affairs in Victoria researchers need to use the PROV collection. The records are most extensive for the period 1839 to 1859, which covers the period of the Chief Protector of Aborigines and his successor the Guardian of Aborigines.

For the period circa 1860 to 1960, it is necessary to conduct research at both PROV and the Melbourne Office of the NAA. This separation of the archives is a result of the State Government legislating to transfer responsibility for Aboriginal affairs to the Commonwealth in 1975. Shortly

after this, those records not already in the custody of PROV were transferred to the Commonwealth by the State Victorian Ministry of Aboriginal Affairs. Victoria is the only state in Australia to have this kind of unique split in regard to the custody of government records relating to Aboriginal people.

In 1998, following the NAA received funding from the federal government for an indexing project to implement one of the BTH recommendations. This NAA received funding from the federal government to conduct a project leading to the indexing of all the records held in the NAA re collection relating to Aboriginal people. This index project enabled researchers to search this part collection of the collection of records relating to Aboriginal welfare and people records in Victoria with far greater ease.

In 2005 PROV, in conjunction with Aboriginal Affairs Victoria, produced *Wilam Naling* in response to the *Bringing Them Home* report in 1997. The word *wilam* means 'place/family/kin' and *naling* means 'to know'.

*Wilam Naling* focused on Victoria's Koorie issues and included a number of recommendations. As a result, PROV received funding to conduct a number of projects, including the creation of the KIN indexing project database.

The aim of the KIN project was seen as a way of achieving parity of access across both the PROV and NAA collections of records relating to Aboriginal people and at the same time, the KIN project will also seek to promote Aboriginal records held at by PROV to the community. Consultation with both the Aboriginal and the archival communities in Victoria informs us that a number of obstacles to accessing government records issues still remain. In particular, there is a lack of awareness in the Koorie and Stolen Generations and Koorie communities about the existence of government records, where government records are located, people's rights to access government records, and what support services are available.

The KIN project is a small step in providing assistance to the Aboriginal community to access these records and and will seek to bring knowledge about these records to the forefront. The records relating to Aboriginal people to date have been largely under-utilised and forgotten. and projects such as KIN help to bring these records back to life, promote awareness of the Koorie community, and in many ways provide the only avenue to revisit the past and the dramatic events that shaped the lives of many Aboriginal people.

The information captured in the KIN database is very simple and straightforward. Only identifying details such as name, date of event, and place are recorded. The index allows researchers to quickly establish if any relevant information is available on the individuals they are trying to find. The database saves people the need to understand archival records systems to find what they want. A search of the KIN database will provide the basic details relating to an individual and the relevant file references where the information was found. To find out any further information on individuals, researchers will need to order the relevant records using the file references they discover through the database. We would like to stress that KIN is a name index database only. It is not designed to compile dossiers on Aboriginal people. The KIN database is currently unavailable to the public; the project will be officially be launched in 2008.

The Aboriginal records series PROV will target in the first phase of the KIN project are:

- VPRS 1694 – Board for the Protection of Aborigines (Correspondence files) (1889–1946)
- VPRS 12 – Aboriginal Protectorate Returns (1840–1849)
- VPRS 11 – Unregistered Inward Correspondence to the Chief Protector of Aborigines – Reports and Returns (1847–1851)
- VPRS 9 – Outward Letter Book of H. F. Gibson Commissioner of Crown Lands (1839–1849)
- VRPS 10309 – Secretary's Letter Book (1905–1916)
- VPRS 26 – Records Relating to Schools for Aborigines in the Westernport and Melbourne districts (1841–1850)
- VPRS 4466 – Unregistered Papers Relating to the Native Police Corps (1848–1849)

It is important to remember that the KIN project is ongoing with no definite end date; the plan is to index all records that have any relation to Aboriginal history. While indexing the Aboriginal collection is the most essential phase, PROV also sees the importance of indexing less relevant records such as inquest, wills/probates, land selection files etc. As a way of illustrating the importance of including all types of records as part of the indexing project, it is often only through piecing together all the items from various sources of information that people are able to trace a person's story in full.

The KIN database has already proven its value through the production of a publication with the working title of *Footprints*. The book is tells the story of Lucy and Percy Pepper, an Aboriginal 'half-caste' family, and it includes transcripts of records of Lucy and Percy's 20-year interaction with the Board for the Protection of Aborigines. The publication illustrates the struggles Aboriginal people faced on a daily basis, and particularly the often-forgotten impact on Aboriginal history of the *Aborigines Protection Amending Act* 1915, often referred to as the Half-Caste Act. *Footprints* will demonstrate the usefulness of the KIN database by showing people in the Aboriginal community the kind of stories about their past, and the connections that they will be able to piece together, through accessing government records held at PROV and the NAA. The book will be launched in September 2007, and is one of the best examples of how important the KIN project is.

## Conclusion

With all the current projects and greater increasing community demand for the resources they will produce, it is an exciting time for PROV. The KIN project in particular will address one of the most pressing needs of the Victorian Koorie community. PROV, along with the community, look forward to the youth and elders of today coming to realise the great resources available to them and the importance of the stories that are contained within these valuable records.

# Managing language: some reflections on corporate glossaries

**Sherrey Quinn**

*Libraries Alive, Canberra*

***Abstract***

*This paper is about corporate glossaries, with discussion of some current initiatives. The author will also present a case study on the development of a system to manage business language (the language used in corporate information and communication) within a large, geographically-distributed Government department. Aims and results of the project, the types of terminology and definitions which are incorporated in the glossary, their sources, and the information recorded about each term (the 'metadata' or 'indexing' aspects of the project) will be covered.*

# Report: Panel Discussion – Indexing cooking/food publications

**Mary Russell**[1]

Organised by Jenny Restarick, this panel discussion was coordinated by Tim White, owner of the Books for Cooks bookshop in Fitzroy, with Tricia Waters and Caroline Colton, freelance indexers and Isabella de Solier, PhD candidate in Cultural Studies at University of Melbourne.

Tricia Waters, Caroline Colton, Isabella de Solier

Tim White gave a lengthy introduction to cook books. Earliest cook books were instructions about preparing food. Post World War II they became a biography or history of a region or a collection of recipes about a specific ingredient or technique. Cook books make up about 8 percent of non-fiction titles and less than four percent of new titles. Over 20,000 cook books published internationally, worth about $48 million. Germany is the biggest market.

Cook books are usually read as literature; readers are more often women and most prefer pictures. Even though Australian kitchens are getting smaller and supermarkets control about 80 percent of all food there is an increasing trend towards slow food.

Cook books are increasingly self published and on specialised subjects, like food on the bone. There is an increasing trend towards hybridisation such as food and travel or food and crime fiction. A new area is translating popular cook books into English.

Tricia Waters talk began: 'I'd like to start with a scene from Anne Tyler's novel *The Accidental Tourist* featuring the Leary family – brothers Charles and Porter and their sister Rose. Porter was calling out to his wife from a list of things that had to be taken on holiday – 'blanket, bottles, diaper bag, formula out of the fridge'.

[1] Reprinted with permission from *ANZSI Newsletter*, vol. 3, no. 4, May 2007, pp. 3–4.

Rose commented 'I notice it's in alphabetical order. I do think alphabetising helps to sort things out a little'. Rose had a kitchen that was so completely alphabetised, you'd find the allspice next to the ant poison.'

When indexing cook books Tricia always thinks of where she would look for that recipe. The first entry for the recipe should be the main ingredient, such as chicken, then the category such as deserts, then title. It may be appropriate to invert the title so main ingredient is first, particularly if, for example, it is 'Aunt Betty's rice pudding'. Don't bother with method of cooking process such as roast, unless it is unusual. Remember to highlight vegetarian and gluten free recipes.

There is an increasing trend for titles to be long list ingredients and to use non-English terms.

Tricia concluded: 'Let's go back to Rose from 'The Accidental Tourist' who grapples daily with the complexities of alphabetising food. Her brothers were helping her to unpack the shopping. 'Rose stood on a stepstool in front of a glass-fronted cupboard, accepting the groceries which her brothers, Charles and Porter handed up to her. 'Now I need the N's – anything starting with N?' she asked. 'How about these noodles?' Porter asked. 'N for noodles or would that be P for pasta?' 'It's E for elbow macaroni, Rose retorted, you might have passed those up earlier'.'

Carolyn Colton thought you couldn't have a session on cooking without a recipe. So she chose one from *Recipes for Aphrodites*. Carolyn explained her work on a photographic database of cook. The publisher thought it might be able to reuse some of its photographs, but later realised that the photographs themselves reflected the era they were from and couldn't really be reused.

Isabella de Solier had a completely different slant on the topic. For her PhD studies she has been studying 'foodies' or people who identify food as a leisure pursuit, not those in the food industry. Her particular interest is in food blogs. These are online personal journals or diaries. Blogs relating to food are very popular. It is estimated that there are at least 1200 food blogs. There is even an annual international food blog award. Food blogs are particularly popular among Asian women.

One of the blogs she demonstrated was Grab Your Fork http://gradyourfork.blogspot.com. This focuses on Sydney restaurant reviews. The blogger has grouped the personal reviews into where the restaurant is located within Sydney. The reviews are arranged alphabetically by restaurant and where there are two or more they are tagged with dates. Culinary events are also included in this blog, together with reviews of previous events attended.

This was a session that could have had another half hour and certainly one of general interest.

Further hints on indexing cook books can be found at www.culinaryindexing.org and the information leaflet produced by the Society of Indexers http://www.indexers.org.uk/index.php?id=126.

# Consensus-based indexing: group development of indexing principles

**Glenda Browne**

*Freelance indexer, New South Wales*

***Abstract***

*Indexers learn how to make decisions in many ways. Most start with the advice they are given in their first course or informal training, and supplement this by reading the rules (standards) and other acknowledged authorities (textbooks). Because indexing is an art as well as a science, most indexers challenge some of the rules, or find they need to extend them. They do this by discussing issues with other indexers – ideally reaching some form of consensus – and by reflecting on their own individual experiences. Because most indexers work for many different clients, they are usually aware of a range of approaches, and can adapt their indexing as needed.*

*At the last ANZSI conference I spoke about evidence-based indexing – the development of indexing principles through the use of research into user behaviour. This paper expands the topic to explore the development of indexing principles through reflection and discussion with colleagues. This discussion usually takes place through mailing lists or occasional printed discussions, supplemented by group discussions at conferences and other gatherings.*

*The nature of consensus development will be explored through a number of examples including the meaning of 'entry' and other words, the filing of small but controversial words, and indexing of the metatopic.*

Indexers learn their trade through initial training, by following standard rules (textbooks, standards, style manuals and other fixed authorities), by applying research into user behaviour, to see what works in practice (Browne 2005a), and by consensus-building through discussion with other indexers.

Consensus is developed through:

- discussions on mailing lists, recorded in archives.

- letters to the editor of society journals provide another long-lasting record of reflection on practice

- group discussions at conferences can be very productive, and should be recorded in conference proceedings (see, for example, McMaster 2000 and Browne 2005b).

Ideally the best suggestions, and the group consensus, should be recorded in a long-lasting, widely-available format, perhaps the fledgling International Indexing Best Practice wiki (www.aboutindexing.info).

In this paper, consensus development will be explored through a number of examples:

- the meaning of 'entry' and other terms

- filing small but controversial characters

- metatopic indexing

## Exercise on talking about filing

At the conference I asked the audience to put the entries below in order:

The Hague
The Beatles: and Australian fans
The Beatles: annual income of
The United Nations
386 chips
486 chips
theatre programs

The aim of this exercise was to ask them 'What would you call that activity?'

I had first looked into the language of filing when indexing the first edition of our book *Website indexing* (Browne and Jermey, 2001), as I had discovered that I had used the terms 'filing', 'sorting' and 'alphabetisation' virtually interchangeably. Following the usage in Wellisch (1st ed, 1991), we used the following definition in the glossary:

> Filing order: rules used for ordering (sorting) index entries. When a computer performs the sequencing it is often called sort order.
>
> with the footnote – The terms filing and sorting are often used interchangeably. Wellisch (*op.cit*) describes filing as the most general term, relating to the arrangement of all graphic signs. Alphabetization refers specifically to the sequence of letters in words, phrases and abbreviations. Sorting is used when the arrangement of graphic signs is performed by a computer. It includes filing of symbols, numbers, and letters, including separate sequences for uppercase and lowercase letters (p.133).

When indexing *The Indexing Companion* (Browne and Jermey 2007) I wanted to be sure to include all likely access points for the topic, so consulted a number of books on indexing. Interestingly, the indexing in Indexing books by Nancy Mulvany had changed in this area from the first (1994) to the second (2004) edition. Most of the books included a wide range of entry terms, no matter what wording had been used in the text. Keywords included those in the list below, sometimes in longer forms (eg, 'arrangement of entries' rather than just 'arrangement'):

- alphabetising/alphabetical arrangement/alphanumeric order
- ordering entries
- indexes: ordering conventions [in an editing book]
- arrangement
- filing
- sorting
- sequencing
- non-alphabetical order/grouped order [these relate to subsets of filing]

As a very rough rule, it appears that:

- librarians file
- computers sort
- editors order
- children put in order, or sort
- indexers arrange and alphabetise/ize (as well as all of the above).

There seems to be no consensus between indexers on this matter, with some happy to use the broad term 'filing', while others consider this to relate to the placement of paper folders or cards in a physical order, rather the sorting of index entries electronically. Where there is consensus, however, is in acknowledging the need to use a range of terms as entry points in indexes, even if they haven't been the term of choice in the text.

## Exercise on talking about entries

The next activity as to see how many entries indexers thought were included in the index excerpt below.

Islam 33–39, *see also* Muslims
aggression condemned by 200–202
in construction of 'Arab other' 33
meeting hall, *see* prayer centre application
terrorists identified with 28–32, 206

According to the AS/NZS 999 standard (1999) and the Chicago Manual of Style (Indexes 2003) this is only one entry.

> Index entry is used to mean: 'a single record in an index, consisting of a header, a qualifier if required, subheadings if required, and locator(s) or cross-reference(s) or both' (AS/NZS 999 section 3.6).
>
> An entry consists of a heading (or main heading), locators, and subentries and cross-references as needed.' (Chicago Manual of Style)

According to Mulvany (2004) it is one according to her definition of entry, but at least five if charging by the entry.

> p.19. 'Entry. A main heading along with the entire block of information that follows it will be referred to as an entry. In figure 1.1, duration, its reference locators, subentries and the cross-reference together constitute the entry.'
>
> p. 37-38. 'Some indexers submit per-entry bids. This format requires a clear understanding of what constitutes an entry. For example, is "dogs, 34-37, 55, 103-4" one entry? Is it three entries? Or is it seven entries? [counting each individual page] In my opinion, it is three entries—the indexer had to type or tag the entry three times because "dogs" appeared in three separate locations in the text.' (Mulvany 2004).

According to Anderson (1997), this would be one index array, made up of a number of index entries. He defines entry as:

> the representation of a documentary unit in a displayed index. It consists of at least a heading and a locator. More than one locator may follow a given heading in a displayed entry array, but each locator, in combination with its heading, represents a single entry. An entry may contain a multi-level heading and a document surrogate in addition to the required locator. (James Anderson in NISO-TR02-1997).

NISO-TR02-1997 would call 'Islam, terrorists identified with 28–32' one entry, and the whole Islam block one entry array. Mulvany (2004) mentions Anderson's use of the term 'index array', and Bella Hass Weinberg's approval of this usage (2004), but she does not use it herself, despite its potential for removing the confusion that occurs when charging by the entry.

In this case the consensus is on the need to define 'entry' clearly, although we still have different usages within and between indexers.

## Filing little words – when do they matter?

It is the 'little' words that cause the most problem when writing and ordering index entries. The reason for this is that a 'big' word usually carries a clear meaning, and so either belongs, or doesn't belong, in the index. And if it belongs, it is normally considered important when determining the filing order. Little words, on the other hand, are often function words, whose chief importance is in saying something about the other words around them. Thus words such as 'the', 'a', 'and', and 'in' are often considered necessary for the overall comprehensibility of index entries, but unimportant in themselves. Filing rules may therefore say that you should ignore initial articles (The, A and An) in main headings, and function words in subheadings.

There are four basic (and contradictory) rules for filing initial articles:

> When filing a title 'The' goes at the end
> And you start with a lower-case letter
> But an index of first lines puts 'the' at the front
> Somehow they think that works better.
>
> For corporate bodies 'the's' often left out
> It's part of the name but it has not much clout
> But in place names the 'The' is important to show
> You must trust the rules, for surely they know!

There are also terms which are not dealt with by any of the rules, for example, what to do about terms such as 'the blues', 'the dead', 'the State' and 'the undead'. The consensus seems to be that you need to include 'the' in the entry, either ignored at the front, or inverted to the back, but I have seen a book on pregnancy with 'the blues' sorted under 't'.

Gary Larson's index to Wiener dog art: a Far Side collection (1990) pokes fun at the concept, with entries such as:

> The one about accountants 96
> The one about alien biologists 102
> The one about the aliens 86

all filed under 't'.

'The' causes problems to people other than librarians, all around the world. Marc Abrahams (2006) edited a special 'THE' issue of the *Annals of Improbable Research*. It included:

- a summary of an article I wrote for The Indexer about filing 'The' (Browne 2001)
- problems in the index to the Cambridge history of Irish literature, as entries starting with 'An', 'A' (also a vocative particle, used when addressing someone) and 'Na' (the plural form of the definite article) are misfiled

- library books starting with 'Na' have been miscatalogued
- 'the' is missed by proofreaders, and is not considered to be a word by children up to age seven.

So there is no consensus about filing 'The' – the rules are different for titles, corporate bodies and places, and even within these categories there is not always consensus, with some inverting 'The' in English place names, but keeping it in translations. My recommendation in my article in *The* I*ndexer* was to give first preference to filing on 'The' when it is important enough to include in an entry, and supplementing this with a reference or double entry as appropriate.

## Indexing the metatopic[1]

Another area of controversy has been what to do about the metatopic – the main topic of a book. Most people acknowledge that it is impossible to put all entries under the main topic, but should any entries be there? Indexers responses have been:

- Some avoid the metatopic completely
- Some use it where absolutely necessary
- Some embrace it as a useful entry or gathering point.

You can avoid the metatopic in two ways – by using subheadings as main headings, and by removing the metatopic as an adjective as the first part of a term. When the metatopic is a main heading with subheadings, instead of having an entry:

wattles (*Acacia*)
allergies caused by
as national symbol
birds and
weed potential

You could use the entries allergies, national symbols, birds, and weeds as headings in their own right. When the metatopic is the first part of a complex term, you can avoid it by simply removing the metatopic word and using the remainder of the term. In a book on pharmacology, as the whole book is about drugs you could use the term information rather than drug information.

### *The Indexer*, indexing in

In 1991, Kingsley Siebel wrote to Geoffrey Dixon, the indexer of *The Indexer*, pointing out that he had not fully followed his 'self-imposed stricture' that 'the term "indexing or its cognates" is not used except as a title entry', as he had included an entry for indexing

[1] Much of the discussion on the metatopic has been taken from Browne and Jermey 2007, *The Indexing Companion.* Melbourne: Cambridge University Press.

programs. Siebel's suggestion was to loosen the stricture and include more at the metatopic, but Dixon's response was to remove the offending entry in the next volume's index, commenting: 'once the term is used as a subject heading there is no drawing back'.

## Metatopic – compromise

Following a middle course, Wilfred Lancaster (2003) notes in the introduction to his index:

> Because the entire volume is about indexing and abstracting, the use of these terms as entry points has been minimised in the index.
> Abstracting and indexing, comparison of, 6–7
> Abstracting exercises, 379–387
> Abstractors as indexers, 123
> Indexing: as classification, 20–22; defined, 6–7; exercises in, 365–378; practice of, 24–49

## Metatopic as TOC-style entry

Yet other indexers use the metatopic positively. Research by Susan Olason (2000) showed that users find the metatopic useful as a table-of-contents-type entry or gathering point that can lead users to places within the index that they might not otherwise have considered. Many biography indexers use the metatopic as a structured entry point into the index, rather than expecting users to search throughout the index for key points in the person's life. Experience in libraries also suggests that users like to start with a broad category into which their specific questions fit, from which they can then narrow the search.

## Metatopic – hard to avoid

There are a few problems with avoiding the metatopic.

Firstly, you can't always assume that because a book is about a topic that all the information referred to in the book will be on that topic. For instance, in a book on drugs, there may be content on patient information and disease information as well, so the use of the term information alone to describe drug information is misleading.

Similarly, in a book on indexing you can't use the term software to refer to indexing software, as you will also have entries for other types of software (e.g., word processing, accounting and speech recognition).

And sometimes the wording just doesn't work without the metatopic word. In a book about the bladder, how can you avoid the metatopic when referring to the 'bladder neck'?

Another problem is that even if drug information is the only information being indexed, just because you are avoiding the metatopic, doesn't mean your users are, nor that the indexers you train will.

In LISA (Library and information science abstracts) the preferred term for an article on agriculture libraries was Agriculture, as every topic in the database was related to libraries. Because indexers often followed their instincts instead of the controlled vocabulary, the term Agriculture libraries was used in error. The inconsistencies were dealt with in the second edition by the addition of the scope note: 'AGRICULTURE: (Occasionally and incorrectly as: AGRICULTURE LIBRARIES)' (Browne 1992).
In addition, while you can avoid the metatopic in entries that you structure, you can't avoid it in titles and names that you are copying verbatim. So an index to The indexer will still have a lot of entries starting with 'index', but they won't be those selected as being most relevant, merely those that were worded that way in the text. For example, there may be entries for journal sections such as 'Index makers of today', book reviews of Indexing from A to Z and so on.
When indexes are used to guide purchasing decisions, the lack of entries at the metatopic could be extremely misleading for customers, who will be unable to readily identify the focus of the book.

Finally, with the trend towards the deconstruction and reconstruction of texts, it would be useful if index terms could be reused in contexts different to the ones for which they were first written. So the entry drug information is more useful than information for a chunk of text that might be moved to a new document collection with a different subject focus.

### Accepting the metatopic

Discussions on Index-L and other forums suggest that most indexers now don't strictly avoid the metatopic, but use it as necessary. Perhaps consensus has developed in this area because saying 'as necessary' allows everyone to do exactly what they like!

## Consensus-based indexing

Indexers have always worked towards consensus through discussions of the issues they face. Modern technology such as mailing lists and wikis enables wider input and quicker responses. Nonetheless, the examples discussed suggest that we are still working towards consensus in many areas. Maybe one day we will be able to agree on basic indexing best practices.

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# Report: Australian and New Zealand Society of Indexers Medal winners and Highly Commended indexers

**Max McMaster**

**and**

**John Simkin**

On display throughout the conference were ANZSI Medal-Awarded Books, along with a list of Medal winners and those whose work had been highly commended. These books had never been collected together and displayed before, and delegates were able to browse through them and make their own assessments of the indexes they contained. A complete list of the titles of the books, medal winners and those who were highly commended is provided below.


## Medal winners

| | | |
|---|---|---|
| **1985** | **Jeremy Fisher** | *Australian encyclopaedia* 4th edition (Grolier Society of Australia, 1983) |
| **1986-87** | no award | |
| **1988** | **Elmar Zalums** | *History of Australia*: *the old dead tree and the young tree green, 1816–1935, with an epilogue*, by Manning Clark (Melbourne University Press, 1987 |
| **1989** | **Alan Walker** | *The Penguin literary history of Australia*, by L. T. Hergenhan (Penguin Books, 1988 |
| **1990** | no award | |
| **1991** | **Geraldine Suter** | *Index to the Argus, 1860* (Council of the State Library of Victoria, 1860) |
| **1992** | **Max McMaster** | *Infectious diseases in pregnancy and the newborn infant*, by G. L. Gilbert (Harwood Academic Publishers, 1991) |
| | **Marjorie Price** | *The law handbook, 1992* (Fitzroy Legal Service, 1992) |

| | | |
|---|---|---|
| **1993** | **Max McMaster** | *Chemistry and biology of (1–3)-β-glucans*, by Bruce A. Stone and Adrienne E. Clark (La Trobe University Press, 1992) |
| **1994** | **Barry Howarth** | *Portrait of the family within the total economy*, by G. D. Snooks (University of Cambridge, 1994) |
| **1995** | no award | |
| **1996** | **Lynette Peel** | *The Henty journals*: *a record of farming, whaling and shipping at Portland Bay, 1834–1839*, by Edward Henry, edited by Lynette Peel (Miegunyah Press, 1996) |
| **1997-99** | no award | |
| **2000** | **Max McMaster** | *The Oxford companion to Aboriginal art and culture*, edited by Sylvia Kleinert and Margo Neale (Oxford University Press, 2000) |
| **2001-02** | no award | |
| **2003** | **Garry Cousins** | *Fundamentals of pharmacology: a text for nurses and allied health professionals*, by Alan Galbraith, Shane Bullock and Elizabeth Manias 4th edition (Pearson Education, 2003) |
| **2004** | **Tordis Flath** | *Toss Woollaston*: *a life in letters*; edited by Jill Trevelyan (Te Papa Press, 2004) |
| **2005** | no competition | |
| **2006** | no award | |

## Highly Commended indexers

| | | |
|---|---|---|
| **1985–88** | Category not used | |
| **1989** | **Michael Harrington** | *Style manual for authors, editors and printers* 4th edition (Australian Government Publishing Service, 1988) |
| **1990** | **Max McMaster** | *Kimberlites and related rocks*: *4th International Kimberlite Conference, Perth, 1986* (Blackwell Scientific, 1989) 2v. |
| | **Elmar Zalums** | *Australia's Commonwealth Parliament, 1901–1988*: *ten perspectives*, by G. S. Reid (Melbourne University Press, 1989) |
| **1991** | **Dorothy Prescott** | *Geology of the mineral deposits of Australia and Papua New Guinea*, edited by F. E. Hughes (Australasian Institute of Mining and Metallurgy, 1990) 2v |
| | **Elmar Zalums** | *Gipps–La Trobe correspondence, 1839–1846*, edited by A. G. L. Shaw (Miegunyah Press, 1989) |
| **1992** | **Josephine Cardale** | *Insects of Australia*: *a textbook for students and research workers*, CSIRO, Division of Entomology 2nd edition (Melbourne University Press, 1991) |
| **1993** | **Michael Cathcart** | *Manning Clark's History of Australia*, abridged by Michael Cathcart (Melbourne University Press, 1993) |
| | **Elmar Zalums** | *The Cambridge history of Southeast Asia*, edited by Nicholas Tarling (Cambridge University Press, 1992) |
| **1994** | **Patricia Holt** | *A history of Hawthorn*, by Victoria M. Peel, Deborah R. Zion and Jane Yule (Melbourne University Press, 1993) |
| | **Kingsley Siebel** | *The laws of Australia*, *volume 5: Civil procedure* (Law Book Company, 1994) |

| | | |
|---|---|---|
| | **Geraldine Suter** | *Australian criminal justice*, by Mark Findlay, Stephen Odgers and Stanley Yeo (Oxford University Press, 1994) |
| | **Alan Walker** | *Blackstone's Guide to Australian legal books, 1986–1990*, general editor, Paul K. Cooper (Blackstone Press, 1993) |
| | **Alan Walker** | *ASC digest*, by Alan Walker, Christine Skourleton, et al (Australian Securities Commission, 1994) |
| **1995** | **Glenda Browne** | *Pharmacology and drug information for nurses* (Harcourt Brace and Company, 1995) |
| | **Pamela Johnstone** | *Online currents*, volume 9, 1994 (Enterprise Information Management, 1995) |
| **1996** | no award | |
| **1997** | **Clodagh Jones** | *The silence calling*: *Australians in Antarctica, 1947–97*, by Tim Bowden (Allen & Unwin, 1997) |
| | **Max McMaster** | *Exploring Central Australia*: *society, the environment and the 1894 Horn expedition*, edited by S. R. Morton and D. J. Mulvaney (Surrey Beatty & Sons, 1996) |
| | **Dorothy Prescott** | *A guide to maps of Australia in books published 1780–1830*: *an annotated cartobibliography*, compiled by T. M. Perry and Dorothy Prescott (National Library of Australia, 1996) |
| **1998** | **Clodagh Jones** | *The journal of Annie Baxter Dawbin, July 1838–May 1868*, edited by Lucy Frost (University of Queensland Press, 1997) |
| **1999** | **Max McMaster** | *Flora of Victoria*, *volume 4: Dicotyledons Cornaceae to Asteraceae*, editors, N. G. Walsh and T. J. Entwistle (Inkata Press, 1999) |
| **2000** | **Madeleine Davis** | *Frank Lowy*: *pushing the limits*, by Jill Margo (HarperCollins, 2000) |
| **2001** | **Trevor Matthews** | *Ecological pioneers*: *a social history of Australian ecological thought and action*, by Martin Mulligan and Stuart Hill (Cambridge University Press, 2001) |
| **2002** | no award | |
| **2003** | **Garry Cousins** | *Dark victory*, by David Marr and Marian Wilkinson (Allen & Unwin, 2003) |
| **2004** | **Max McMaster** | *Biology*: *an Australian focus*, by Pauline Ladiges, Barbara Evans, Robert Saint and Bruce Knox 3rd edition (McGraw Hill Australia, 2005) |
| **2005** | no competition | |
| **2006** | no award | |

# Report: Conference social events and entertainment

**Jenny Restarick**[1]

## Welcome Happy Hour – Thursday 15 March

Workshop participants, newly arrived conference delegates, Vic Branch members and partners celebrated the successful completion of Day One – the Workshop program, at a convivial 'meet and greet' function in the Tracks Bar of Amora Riverwalk.

For a healthy end to the day, a large party walked along Bridge Road to Café Boheme for dinner, ably organized by Catherine Tully, after which we ambled back to the hotel and home to bed.

## Conference Dinner – Friday 16 March

A good crowd of delegates and partners enjoyed a night of great camaraderie, fine dining and wining, together with an 'ice-breaker' table competition of 'name the logo/brand' plus enjoyable music from the Jazz Doctors band, with the inclusion of ANZSI Council member and trombonist, Don Jordan.

## Break-Up Dinner – Saturday 17 March

At the end of the afternoon sessions, after paying the final accounts and saying farewell to many of our travelling visitors, a handful of Committee members, visitors and presenters crossed the road to dine together at the Bridge Hotel, to cement friendships and drink to the successful completion of yet another international indexing event.

Kesaia Vilsoni and Dee McArthur

[1] Reprinted with permission from *ANZSI Newsletter* vol. 3, no. 3, 2007, p. 3.

Walter Lee and Jenny Restarick

Jenny Restarick, Alex George and Tricia Waters

Shirley Campbell, Walter Lee, Lynn Farkas and Tracey Harwood

Don Jordan joins the Jazz Doctors

Mary Russell, Frances Lennie and Don Jordan

Jon Jermey and Caroline Colton

Walter Lee and Margaret Findlay

Tony Venn and Geraldine Beare

Italic page numbers indicate photographs

## A

## D



## E

## F



## G



## H

## Q



## R

## S



## T

## Z

Australian and New Zealand Society of Indexers (ANZSI)

# ANZSI NEWSLETTER

Volume 3, number 3, April 2007

## From the President

Last month, the Victorian Branch of ANZSI hosted the 2007 ANZSI Conference, *The Indexing Life*. The holding of regular conferences is an important function of the Society, and it is gratifying that so many delegates kindly took the trouble to communicate, either verbally or in writing, their positive experiences of the Conference.

On behalf of the ANZSI Council, and as Victorian Branch President, I would like to commend the Victorian Branch Committee, their Conference Committee, and in particular, Margaret Findlay, the Conference Convenor, for putting together such an interesting and enjoyable program, and for ensuring the financial success of the conference.

I would also like to offer my thanks to all presenters and delegates whose participation in the conference helped to make it such an enriching experience.

*Karen Gillen, ANZSI President*

## *The Indexing Life* – an overview

### Australian and New Zealand Society of Indexers Conference 15–17 March 2007, Amora Hotel, Melbourne, Australia

The theme of the recent conference, *The Indexing Life*, reflected the intention of the organisers to put together a program that touched upon as many aspects of 'the indexing life' as possible and provided professional development opportunities for those just starting out in the profession through to those with well-established careers. Accordingly, the conference provided delegates with a varied program of workshops, conference papers, 'birds of a feather' sessions, panel discussions, a comic reading, and an exercise session, as well as formal and informal social activities. The program catered for both database and web indexers and back-of-book indexers, and also provided plenty of opportunities for socialising and networking.

The Conference was attended by delegates from Australia and from a number of other countries. It was with great pleasure that we once again welcomed Geraldine Beare as the official representative of the UK Society of Indexers (SI), and Frances Lennie as the official representative of the American Society of Indexers (ASI). We were also very pleased to welcome the other international visitors to the conference: Kesaia Vilsoni from Fiji, Saeed Rezaei Sharifabadi from Iran, and Linda Chu from Hong Kong. Within Australia, in addition to those from Victoria, delegates came from the

*(continued on pages 4, 5 and 7)*

*Kathy Simpson and Catharine Tully at the registration desk*

## WHAT'S INSIDE



**Deadline for the May 2007 issue: 4 May**

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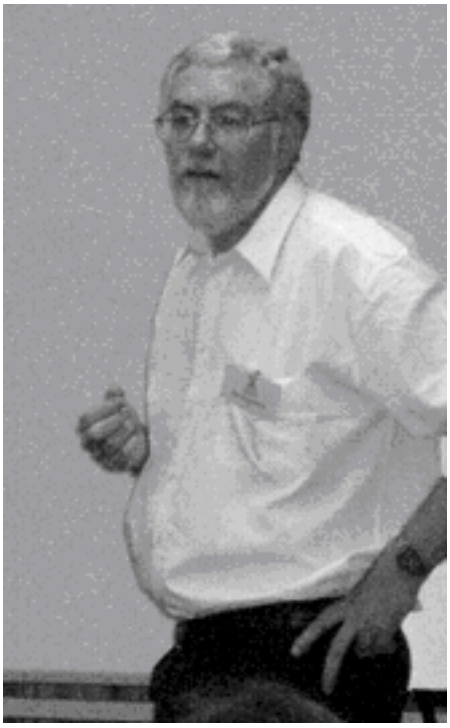
GPO Box 2069, Canberra ACT 2601

(*Overview, continued from page 1*)

ACT, New South Wales, Queensland, South Australia, Tasmania, and Western Australia. The ANZSI Council sponsors the attendance of a member who resides in a location remote from the conference. This year's successful applicant for sponsorship was Alex George, from Perth, Western Australia. Alex's report of the conference appears on page 6 of this issue of the *Newsletter*. Of the 77 delegates who attended, 38 were self-employed or freelance indexers, while the others worked full- or part-time in organizations.

The Conference began with a number of optional workshops on Thursday 15 March. Max McMaster (Vic) presented a full-day workshop at Swinburne University of Technology on 'Newspaper and magazine indexing'. A couple of half-day workshops were also held at Swinburne, with Frances Lennie (US) leading a morning session on 'Cindex Software', and Glenda Browne (NSW) presenting an afternoon workshop on 'Web Indexing'. Another couple of half-day workshops were held at the Amora Hotel. Alan Walker (NSW) presented a morning session on 'Law Indexing', and Michael Harrington (ACT) held an afternoon workshop on 'Indexing Annual Reports'. Overall, the workshops were well attended, with Glenda Browne's workshop on 'Web Indexing' proving particularly popular.



*Max McMaster*

Early on Thursday evening, a 'Welcome' Cocktail Hour was held in the Tracks Bar of the Amora Hotel. This was a great opportunity to catch up with old acquaintances and meet some newer ANZSI members and conference delegates. A number of delegates then strolled down Bridge Rd, Richmond, to a nearby restaurant, to enjoy an informal dinner hosted by ANZSI Victorian Branch Committee members.

On Friday morning, following the official opening of the conference, the first keynote address for the conference was presented by Geraldine Beare (a freelance indexer, and official representative of the UK Society of Indexers). In a fact-filled, witty and thought-provoking presentation, titled 'Indexing Past and Present: Whither the Future', Geraldine traced the evolution of indexing, from the Paleolithic to the present, and offered some predictions about the future of indexing. The final quote provided, from Eric Hoffer, is worth repeating here: '*In times of change, learners inherit the world, while the learned remain beautifully equipped to deal with a world that no longer exists.*'

During breaks throughout the conference, delegates were able to browse through the Trade Exhibition, order a range of Society of Indexers (SI) publications, or purchase items from the $5 table (book-stops, additional conference bags and badges, Proceedings of the 2005 ANZSI Conference, etc.).

Also on display at the conference were ANZSI Medal-Awarded Books, along with a list of Medal winners and those whose work had been highly commended. This is the first time that these books have been collected and displayed together, and delegates were able to browse through them and make their own assessments of the indexes they contained. A complete list of the titles of the books, and the medal winners will be included in the June issue of the *Newsletter*.

Following morning tea, there were concurrent 'Birds of a Feather' Sessions. Prue Deacon (ACT) chaired a session for database and web indexers, cataloguers, metadata creators and thesaurus developers, while Max McMaster (Vic) chaired a session on back of book indexing. Next on the program was a panel discussion, chaired by Alex George, on 'Indexing Gardening/Botany publications'. Panellists included Alex George (WA), Caroline Colton (NSW) and Roger Spencer (Royal Botanic Gardens, Melbourne). Detailed reports of this

## Calendar of forthcoming Branch activities

| Date & time | Organiser | Name of activity | Venue | Contact details |
|---|---|---|---|---|
| 24 April | NSW Editors | Lunch | Firehouse Hotel, 86 Walker Street, North Sydney | All ANZSI members warmly invited. No need to RSVP. |
| 30 April<br><br>1 May | Vic Branch<br><br>Vic Branch | Introductory indexing training<br><br>Intermediate indexing training | Holmesglen TAFE | Max McMaster<br>ph/fax +61 3 9500 8715 or<br><max.mcmaster@masterindexing.com> |
| 23 June<br>30 June | NSW Branch | Basic book indexing course | Thomson Legal & Regulatory, 100 Harris Street, Pyrmont | Lorraine Doyle<br><lorraine.doyle@thomson.com> |
| 11 August | NSW Branch | Indexing specialties seminar | NSW Writers' Centre, Rozelle | Lorraine Doyle<br><lorraine.doyle@thomson.com> |

panel discussion, and the preceding 'Birds of a Feather' sessions will be published in the May issue of the *ANZSI Newsletter*. In a parallel session, Prof. Wallace Kirsop (Centre for the Book, Monash University) presented a fascinating paper entitled 'Behind the scenes in publishing in nineteenth and early twentieth century Australia'.

After lunch, Geraldine Triffitt (ACT), presented a paper on 'Compiling a bibliography in the digital age', and Dennis Bryans (Vic) followed with a paper on 'Compiling and indexing a bibliography of theatre programmes'. In a parallel session, Jeanne MacKenzie (National Center for Vocational Education Research, Adelaide SA) gave a presentation on 'The VOCED database – from indexing to dissemination', and Pru Mitchell (Education, SA) presented a paper on 'Learning architectures: issues in indexing Australian education in a Web 2.0 world'.

During the afternoon tea break, there was an official launch of *The Indexing Companion* by Glenda Browne and Jon Jermey (CUP 2007). Professor Pam Peters, from the Dictionary Research Centre at Macquarie University, gave a full and very positive review of the book. With the authors on hand to sign copies, many delegates took the opportunity to purchase the book.

Next on the program, Jennifer Gawne and Kathy Simpson (Vic) provided details of some of the more unusual jobs undertaken by indexers at Sensis Pty Ltd. They were followed by Kerry O'Sullivan (AMIRA, Melbourne), who gave a presentation on 'Data Metallogenica', an image-based mineral deposits database. In a parallel session, Max McMaster hosted the 'Indexers Road Show'. The expert panelists on hand to evaluate indexes supplied by delegates were: Michael Harrington (ACT); Max McMaster (Vic); Michael Ramsden (Vic); John Simkin (Vic); Alan Walker (NSW). A detailed report on this innovative session will be provided in the May issue of the *ANZSI Newsletter*.

The Conference Dinner was held on Friday night in the Atrium of the Amora Hotel. Jenny Restarick hosted the dinner, and the Jazz Doctors provided the background music to an entertaining and enjoyable social occasion.

The final day's program began with a presentation by Lynn Farkas, the ANZSI Mentoring Coordinator, on the 'New Look' Society-Wide Mentoring Scheme.

Following morning tea, Professor Pam Peters (Dictionary Research Centre, Macquarie University) presented the second keynote address: 'Language on the move'. Professor Peters used a series of examples of English borrowings from classical languages, for example the spelling of words like 'h(a)emoglobin' and plurals of words like 'retina', to show the ongoing process of assimilation that underlies the surface variation in the spelling of such words. Significantly, the variable forms of words have some impact on the alphabetisation of words, and on indexing that looks beyond the spellings used in the author's text.

*Professor Pam Peters*

The next item on the program, and a wonderful complement to Professor Peters' presentation, was a comic reading by journalist Sharon Gray (columnist with *The Age* Newspaper) of an article by Richard Boston, published in the *Guardian* (16 April 1989), on how the 20-volume Oxford English Dictionary came into being.

*Sharon Gray*

In order to work up an appetite for lunch, the next item on the program was a health and fitness session presented by Jenny Davrain. A few delegates demonstrated astonishing bursts of speed to escape from the room before the doors were locked. Those that remained were shown and encouraged to practice a range of stretch and relaxation exercises for sedentary workers involving tins of baked beans, bottles of tomato sauce, John Travolta impersonations, and a lot of laughter.

After lunch, it was back to business, with Renee Otmar (Vic) presenting a seminar on 'Business basics for freelance indexers: what to do before and after you hang up your shingle.' In a parallel session, Jon Jermey (NSW) gave a paper on 'The database in your future'; Andrew Pentecost (Maxus, Melbourne), gave a demonstration of database and thesaurus management software products in the construction of a database index; and Saeed Rezaei Sharifabadi (Alzahara University, Iran), gave a presentation on 'The feasibility of subject authority control of web-based Persian medical databases'.

Following afternoon tea, Shauna Hicks and Simon Flagg, from the Public Records Office, Victoria, gave a presentation on 'Indexing manuscripts and the Koorie Indexing Name Project'. Sherrey Quinn (ACT) then gave a paper on 'Managing language; some reflections on corporate glossaries'. In a parallel session, there was a panel discussion on 'Indexing

*(concluded on page 7)*

*(Conference overview, continued from page 5)*

cooking and food publications'. Panellists included: Tim White, Caroline Colton, Isabelle de Solier and Tricia Waters. A detailed report of this seesion will be published in the May issue of the *ANZSI Newsletter* The final paper of the conference was presented by Glenda Browne (NSW), on 'Consensus-based indexing: group development of indexing principles'.

In the closing session, Dee McArthur's name was drawn as the winner of the *Oxford Dictionary* generously donated as a

*Tricia Walters, Caroline Colton and Isabelle de Solier*

prize by Oxford University Press. We hope the rest of the delegates also left the conference feeling enriched by the opportunity to share and extend their knowledge.

Another benefit of the conference was that it attracted some publicity for the Society. During the conference, journalist Trevor Robbins interviewed Karen Gillen and Max McMaster for an article he is writing on indexing as a profession for the Careers lift-out section of the *Age* newspaper. The article is to appear in the 21 April 2007 edition of the paper.

After appearing as a guest presenter at the conference, Sharon Gray, a columnist at the *Age*, also approached ANZSI with a request to do an article on indexers and indexing. Sharon interviewed Jenny Restarick, Sherrey Quinn and Prof. Pam Peters, and her resulting column appeared in the *Age* in the 10 April 2007 edition.

Throughout the planning and organizing of the conference, the Conference Committee of the Victorian Branch reported regularly on its activities to the ANZSI Council (formerly Committee). Its reports will provide a valuable resource for future ANZSI conference planners. As part of its operations, the Conference Committee also compiled a Conference Checklist for use by conference organizers. The Conference Checklist is to be published later this year in the *Indexer*.

Finally, the Proceedings of the Conference will be produced as soon as possible, and details of its availability will be posted in the *ANZSI Newsletter*, and on the ANZSI website in the near future.

*Karen Gillen, ANZSI President*
*Margaret Findlay, Conference Convenor*

**WHERE AM I GOING?**

**... I DON'T KNOW**

**WHERE AM I HEADING?**

**... I AIN'T CERTAIN**

*(with apologies to Lerner and Loewe and* Paint your Wagon*)*

You don't? You ain't? Then join ANZSI (Vic) members in a visit to the Map Collection of the State Library of Victoria, where their Map Librarian, Judith Scurfield, will introduce us to this collection. The main focus is on Australian maps, particularly Victorian, although the Library also has strong holdings of maps from overseas.

Date: Thursday, 26 April.

Time : 5.00 pm start, with our usual enjoyable dinner afterwards in a nearby modestly-priced restaurant.

Meeting place : Main front foyer, 328 Swanston Street.

RSVP by Monday 23 April to Jenny Restarick, phone 03 9528 2539 or email <cliffres@connexus.net.au>.

Group numbers are limited to 20.

## ANZSI ACT CINDEX Workshop

Nine people attended this workshop on the morning of 24 March, chaired by Frances Lennie, creator of CINDEX and mentor to many users of it over the years. She gave a workshop at the recent ANZSI conference, and, as five of the nine people had attended that conference, she used this session as a continuation, answering specific questions.

CINDEX will, for example, allow you to create a personal dictionary of names, ideal for Aboriginal names with variations in spelling, as an expert present pointed out. CINDEX can create multiple screens, say, in draft and final view, as well as groups of temporary entries, perhaps using different fonts for each group.

If you enter page numbers in full form, CINDEX will do the eliding. It will change the method of sorting and will show an unformatted view, all records uncompressed, or a summary view, main headings only. Frances stressed the importances of cross-references, of saving records and of making backups. Other more specific questions were also answered and demonstrated.

A brochure is available at <www.indexres.com>_to explain how to get started with CINDEX.

*Edyth Binkowski*

## Call for expressions of interest

The Society of Indexers celebrates its anniversary at its Conference in London, 13-16 July 2007 and will offer one free place to a representative of ANZSI. Are you interested in taking that place? If so, contact Anne Dowseley at <secretary@aussi.com>.

Meanwhile you can find further information about the conference on the Society of Indexers website at

<www.indexers.org.uk/index.php?id=277>

# Conference report by Alex George, the ANZSI-sponsored delegate

I won't go into the presentations in detail, since abstracts are available of most and I believe that there will be some kind of publication, whether printed or electronic is yet to be decided. Of the workshops held on Thursday, I chose that by Frances Lennie on Cindex software, mainly because I'd seen the advertisements but knew nothing about it. From the session and informal discussions with Frances I gained an understanding of the system and its potential. While it is better applied to more complex indexing than the kind that I do, I gained useful hints for my work.

On both Friday and Saturday there were plenary and parallel sessions, the latter presenting papers on a wide range of topics but also meaning difficult decisions on which to attend. With apologies to those whose sessions I could not attend, what did I get from the papers?

From Geraldine Beare: a wonderful overview of the history of indexing, from cave art (yes, it can be seen as an index) to the present with its widening array of the kinds of indexes being produced as finding aids.

From Max McMaster: reminders of how to deal with both commonly met problems such as undifferentiated locators, what to do with Mc/Mac/M', with articles, and less common ones such as ethical matters (how do I treat a word that was acceptable when the work was first published but by the time of a reprint 50 years later is derogatory?; should I take that job when I disagree with the author's concepts?).

From Roger Spencer and Caroline Colton (my co-presenters in a panel discussion on indexing botanical and gardening works): mutual support in our particular field; caution in using plant names coined for commercial use.

From Geraldine Triffitt: on the compilation of a bibliography (which is, after all, a kind of index), emphasising the benefits of co-operation with authors while remaining alert to the moral rights of individuals.

From Dennis Bryans: an insight into a subject area foreign to me – theatre programs, their myriad forms, their changeability (even by the day) and the complexities of indexing people, performances, advertisers and slang.

From Kerry O'Sullivan: a masterly demonstration of building, indexing and using an international library of geological specimens (70 000+), with images, legends and a map-based finding aid for access via the World Wide Web.

From Jennifer Gawne and Kathy Simpson: a view of the indexing needs of the world of commerce (with particular emphasis on producing the Yellow and White Pages).

From Lynn Farkas: how the Society's mentoring scheme for training new indexers has been developed, how it will operate, and some challenges facing it (Glenda Browne's closing paper led to discussion of some issues that the Education Committee faces in the scheme).

From Pam Peters: a reminder (if we needed it!) of the fascination and joy (?) of words, their diverse origins, how they enter the language and their evolution in different countries.

From Sharon Gray: a 'performance poet' reading of a paper by Richard Boston on the creation of the *Oxford English Dictionary*, combining history and humour.

From Jonathan Jermey: the influence of the computer and database on our profession, our need to understand, and stay current with, developments.

From Andrew Pentecost: using Maxus as an example, a demonstration of building and managing a database index, and the use of thesaurus terms.

From Saeed Rezaei Sharifabadi: a fascinating look at the problems encountered in building a medical database for both national and international use in a country that does not have English as its first language, with adequate authority control.

From Shauna Hicks and Simon Flagg: an insight into Koorie records in Victoria, the problem of having archives split between the State and Commonwealth, the difficulties of using handwritten records that may be fragile, incomplete, almost illegible, inconsistent in spelling names etc.

From Sherrey Quinn: an insight into the problems of seeking standard use of terminology in a large, diverse organisation, the example being the Department of Defence which also deals with counterparts in other countries that may use the same terms but with different meanings.

From Glenda Browne: a challenging talk about 'consensus-based' indexing that highlighted the benefits that could come from agreement on principles and standards but, in the example of defining 'index entry', showed how difficult it could be in some areas.

It was appropriate to have the book *The Indexing Companion* by Glenda Browne and Jon Jermey (Cambridge University Press) launched by Pam Peters. Judging from the sales it will quickly become a standard reference for practising indexers.

The trade exhibition was confined to sales of publications from our Society, the Society of Indexers and Cambridge University Press. There was also a display of indexes that had been awarded medals over the past two decades.

There were two extra-curricular events, the conference dinner when the food, conversation and entertainment were excellent, and a 'health and well-being' session with practical exercises to demonstrate how we should look after our physical state in a relatively sedentary occupation.

Finding a catchy title for a conference can be difficult, but including *Life* in this one was highly appropriate as the program and the participants showed that our profession is indeed a living one – in the work itself, in the evolving technology and demands, and in our inter-relationships. So I came away with new knowledge and insights, a wider understanding, a wider circle of colleagues, better equipped to handle both the constants and the changes in the world of indexing.

*Alex George*
*ANZSI's WA contact*

Australian and New Zealand Society of Indexers (ANZSI)

# ANZSI NEWSLETTER

Volume 3, number 4, May 2007

## From the President

Following on from last month's Newsletter, this issue contains further reports on the recent ANZSI Conference, *The Indexing Life*, held in Melbourne, 15–17 March 2007. For the benefit of those who could not attend the conference, and to refresh the memories of those who did, this issue includes summaries of the Panel Discussions on indexing gardening/horticulture texts and food/cookery books, and a report on the 'Indexers Roadshow'. Next month's Newsletter will include summaries of the 'Birds of a Feather' sessions on database and web indexing, and back-of-book indexing, and a complete list of medal awarded books, medal winners and those whose work was highly commended.

I'm pleased to report that the publicity generated by the conference has had some positive outcomes for the Society.

During the conference Max MacMaster and I were interviewed by Trevor Robbins for an article he was writing on indexing as a profession. This article was duly published in the 'Careers' lift-out section of the *Age* newspaper (28/04/07, p.25). It triggered an extraordinary degree of interest in indexing and also in indexing training (including the mentoring programme). As a result, we have scheduled additional workshops in Melbourne to accommodate the demand for training, and the Society has attracted a number of new members.

*Karen Gillen, ANZSI President*

## Thoughts on the ANZSI Conference, 15–17 March 2007

### by Pru Mitchell, Senior Information Officer, education.au

A question I have had to address both before and since the conference is, 'Why would a librarian who works in an online education information service attend and present at a conference for indexers?' In writing this report, I am looking to clarify the benefits of involvement both for *education.au* as well as personally. From the ANZSI Conference these benefits came in the form of Connection, Promotion and Education.

#### Connection

The opportunity to network with presenters and delegates, both in formal sessions and during breaks, provided plenty of avenues for promotion and education. Major discussion themes included usability and the need for greater research into and awareness of user search behaviour, where search patterns indicate fast, accurate results may not always be the user's goal. There was reference to some evidence that some users prefer optional answers, or popular answers to a 'correct' answer.

The difficulty of indexing both for intermediaries who are search experts and to accommodate self-service by end users was raised. The 'pointing finger' for me for the conference was the observation that the greater the distance from the user or 'the information discoverer', the more danger that indexing, search functionality and cataloguing practice will be irrelevant.

A common theme amongst the web indexers present was the fact that in many cases organisations including government do not recognise the cost of metadata creation, or are not resourcing this activity. Discussion about the Australian government's portal strategy was one aspect of this. The explosion of audio and video formats was also raised and

*(continued on page 3)*

### WHAT'S INSIDE



**Deadline for the June 2007 issue: 5 June.**

*(Pru Mitchell's view, continued from page 1)*

the question of who is going to index the thousands of podcasts being produced?

Connection with leaders in the field is another benefit of conference attendance, as is exposure to the latest publications. Pam Peters launched a new 'bible' or *Indexer's Companion* written by Glenda Browne and Jon Jermey, and was both eloquent and persuasive in her introduction to this important work.

### Promotion

The opportunity to present a paper was a major benefit of the conference for my organisation. It enabled me to relate the work of *education.au* to a new audience with particular reference to information architecture and search, and to raise issues of the impact of social tagging and folksonomies on indexing. Our current work on the Schools Online Thesaurus (ScOT) was of immediate relevance in this context. The fact that we presented alongside a key search partner, Jean MacKenzie of the National Centre for Vocational Education Research (NCVER) enabled us to reinforce the strong collaborative culture of *education.au*.

### Education

It is interesting to learn from an allied discipline and to make links with prior knowledge. Geraldine Beare's opening keynote session, entitled 'Indexing Past and Future', provided an illustrated historical overview of indexing, information retrieval and search, from the hand symbols seen in cave and rock art to the machine indexing of today. The large proportion of publishers now outsourcing, particularly to India, is a significant issue which could well impact on web services in other areas. The fact that a search engine is an index was a point worth emphasising, and put the rest of the conference in context for me. The challenge of regularly tweaking search algorithms raised many questions which warrant further research.

Director of the Dictionary Research Centre at Macquarie University Pam Peters provided a keynote session entitled 'Language on the move'. This was based on research conducted around language innovation, variation and change. Some well chosen examples provided a fascinating insight into the process of how language evolves, who adopts various rules and spellings, and how quickly the process occurs. This was a timely session for those immersed in thesaurus work and struggling with currency and literary warrant issues.

I was challenged by presenters from concurrent sessions to investigate new software options for managing thesauri, to upgrade my database management skills and to investigate the search engine interface of some major Australian online services. A compulsory exercise session for sedentary workers complete with soup can weights was an interesting and energising session idea for a conference. As someone who is often involved in conference organisation, it was great to watch highly efficient conference organisers go calmly about their tasks, making it a very easy experience for participants and presenters.

So what are the two key things I take from this conference? An action point to research machine generated indexing, tagging and metadata, and a renewed resolution to centre attention on the two basic principles of usability and findability.

*Pru Mitchell*

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# Panel discussions 1: Indexing cooking and food publications

Organised by Jenny Restarick, this panel discussion was coordinated by Tim White, owner of the Books for Cooks bookshop in Fitzroy, with Tricia Waters and Caroline Colton, freelance indexers and Isabella de Solier, PhD candidate in Cultural Studies at the University of Melbourne.

Tim White gave a lengthy introduction to cookbooks. The earliest cookbooks were instructions about preparing food. Post World War II they became a biography or history of a region or a collection of recipes about a specific ingredient or technique. Cookbooks make up about eight per cent of non-fiction titles and less than four per cent of new titles. Over 20,000 cookbooks are published internationally, worth about $48 million. Germany is the biggest market.

*Tricia Walters, Caroline Colton and Isabelle de Solier*

Cookbooks are usually read as literature; readers are more often women and most prefer pictures. Even though Australian kitchens are getting smaller and supermarkets control about 80 percent of all food, there is an increasing trend towards slow food.

Cookbooks are increasingly self-published and on specialised subjects, like food on the bone. There is an increasing trend towards hybridisation such as food and travel or food and crime fiction. A new area is translating popular cookbooks into English.

Tricia Waters talk began: 'I'd like to start with a scene from Anne Tyler's novel *The Accidental Tourist* featuring the Leary family – brothers Charles and Porter and their sister Rose. Porter was calling out to his wife from a list of things that had to be taken on holiday – "blanket, bottles, diaper bag, formula out of the fridge". Rose commented "I notice it's in alphabetical order. I do think alphabetising helps to sort things out a little". Rose

*(continued overleaf)*

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It is *your* newsletter, and we are totally dependent on contributions, both large and small, from members. Please contact the editor if you have any questions about the suitability of items for publication. The editor reserves the right to edit or abridge contributions.

Please send files via email in MS Word Rich Text Format or plain text (ASCII). Do not embed footnotes in Word files.

**Next deadline**

5 June for the June 2007 issue.

**Graphics**

Image files can be accepted in most common formats. Do not embed images in text files. Camera-ready art and photos can be scanned by the editor. Note that photos need to be clear, sharp and contrasty if they are to copy well in black and white.

**Advertising charges**

Full page A$175; half page A$90; quarter page A$35; full year 10 for the price of 8.

**Membership charges**

A$55 per year; A$30 half year (Jan to June). Student member A$30.
Subscriptions to the Newsletter A$40 p.a.

**The Indexer**

*(international indexing journal)*
Maureen MacGlashan, Executive Editor
<editor@theindexer.org>
Cost: A$35 for ANZSI members.

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**Indexers Available**

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# From the Conference Convenor . . .

## . . . and from some satisfied conference-goers

*Margaret Findlay*
*Conference Convenor*

On behalf of the Conference Committee of the Victorian Branch of ANZSI, I would like to thank all those who passed on their kind congratulations and generous praise regarding the recent conference. Reproduced below are some of the comments received by the Conference Committee.

'I just thought I would thank you and everyone concerned for a really excellent conference. Thank you so much for inviting me – I really enjoyed it – again! ... once again a good range of speakers, great venue and everyone so friendly and encouraging.'

*Geraldine Beare*

'Please pass through to the committee my compliments for a very well run conference. Most enjoyable and informative.'

*Kerry Biram*

'I think that the ANZSI Conference is the best run conference that I have had the privilege to attend. It was great. My thanks to all.'

*Dennis Bryans*

'Thanks for organising the workshops and the conference. The workshop afternoon was most informative to me, and I'm hoping to purchase the manual from Glenda Browne soon.'

*Frederick Fong, Department of Infrastructure, Victoria*

'I had a good experience – interesting papers, an opportunity to meet in person a number of people I had phone and email relationships with previously, and the pleasure of meeting new people from the indexing community as well. Congratulations on such a successful conference.'

*Kate Indigo, Cambridge University Press*

'I attended the recent ANZSI Conference and found it very useful and enjoyable. I would like to congratulate all who contributed to its organization and success.'

*Helen Mann*

'I enjoyed my limited time at the conference, especially getting a chance to see the famous Pam Peters in action. She's one of my heroes.'

*Andrew Pentecost*

'As one who has been to many indexers' conferences I consider this to be one of the best. The range and balance of papers and other activities was spot on. Your committee did its work admirably.'

*John Simkin*

'I had a wonderful time at the conference – a very well balanced program I thought, along with the social activities. It's great to catch up with kindred spirits again.'

*Tricia Waters*

*Margaret Findlay, Conference Convenor*

## ACT Region Branch conference feedback session

This session was well attended both by people who had been to the Melbourne conference and those who had not but wanted to hear some impressions of it. Geraldine Triffitt chaired the meeting.

Susan Elvey (Parliamentary Library) had gone to Max McMaster's newspaper and database indexing workshop, which gave a good overview with interesting discussions and practical exercises.

Sherrey Quinn (LibrariesAlive) went to Glenda Browne's web-indexing course, which included general information, navigation aids, samples using HTML Indexer, all easy to use, interesting and enjoyable. Sherrey thought it would be worth while asking Glenda to run the course again in Canberra.

Sandra Henderson (National Library) went to Frances Lennie's CINDEX workshop. This was similar to the one Frances later conducted in Canberra, with useful tips and hints, keyboard short cuts, comparisons with Sky Index, and comparing the Macintosh and Windows versions.

The first keynote address was given by Geraldine Beare, the UK representative of the Society of Indexers. Lynn Farkas commented that her speech focussed too much on the past history of indexing, with no mention of its present and future problems. She contrasted this with two conferences she had attended in 2006, in England and Canada, where current problems were raised, e.g. outsourcing of indexing work to India, and its implications for locally trained indexers.

In the first parallel session, Eleanor Whelan went to the Database and Web-indexing session, chaired by Prue Deacon (ACT Dept of Health). The discussion was wide-ranging and informal without trying to reach consensus. The future of database indexing is changing, with many databases closing down, user behaviour changing, and the suggestion that metadata no longer works. There is the problem of dumbing down in education, and of students expecting to find all information on the Internet. Machine indexing is another threat to indexers' employment.

Lynn Farkas attended the back-of-book indexing session, which dealt with specific problems such as the filing of prepositions, undifferentiated locators, popular names and standards. Also 'ethical dilemmas': if the index is of something abhorrent to you, you have the choice of not doing the work or distancing yourself from it.

The panel on indexing gardening and botany publications gave a behind the scenes look at 19th and early 20th century publishing, including Alex George on scientific names and Caroline Colton on indexing a wine collection. Susan Elvey reported this panel as witty and enjoyable.

Geraldine Triffitt then spoke on 'Compiling a bibliography in the digital age', including problems of copyright when you have to update a bibliography. AIATSIS held the copyright to the original Ozbib, so Geraldine had to re-check every item to find the property owner. Sherrey Quinn found this very valuable, having had problems with moral rights as an author.

The two concurrent education and training sessions were very helpful. Eleanor Whelan reported on the one on educational and training databases, mostly international, usually with a hard copy backup. Learning Architecture was a different cluster of educational databases, many compiled by educational authorities. One result is how learning object metadata makes input available from various databases in a Web 2.0 context. Another new development is tag clouds, which Lynn sees as having implications for all of us in thesaurus construction, e.g. the National Library's Flicker project, where users can flick through a collection of photos, and add their own. This can tell you how other people use vocabulary.

The next parallel session was 'Data metallogenica', an image-based collection of core samples of minerals by AMIRA in Melbourne, a world-wide collection which has been preserved in Australia.

Tracy Harwood went to the 'Indexers' Roadshow', to get help and advice on editing and indexing for a project she is working on.. There were five experts: you formed a queue and chose your expert, perhaps more than one, as Tracy did, finding the advice very constructive.

Saturday began with Lynn Farkas, the ANZSI Mentoring Coordinator, discussing the mentoring scheme. The keynote speaker who followed was Professor Pam Peters, Dictionary Research Centre, Macquarie University. She spoke of the many changes in the English language, e.g. the changes between US and UK spelling, the spelling of such words as h(a)emoglobin, spelling of people of different age groups, e.g. for text messages.

Everyone had enjoyed the light-hearted expose of the OED, and the health and wellbeing session. The following concurrent sessions were a mixed bag, with Jon Jermey as always useful on databases of the future and how to access them. The paper from Iran was basic in detail, and with no rigour in the research. The seminar on business basics was a day-long presentation which should have been edited down for the appropriate timeframe.

Geraldine Triffitt spoke on the Public Records Office and the Koorie indexing names project. The speakers from the Office talked of the difficulties of indexing manuscripts, which might be faint, faded or poorly written. Sherrey Quinn had given a paper on general things of general interest, e.g. authorities, glossaries, thesauri, acronyms, Defence problems and similar topics. Shirley Campbell reported on the panel on indexing cooking and food, which was not well managed, allowing insufficient time for speakers.

Glenda Browne spoke about consensus-based indexing, having spoken at a previous conference about evidence-based indexing. There are problems however. Are we working to the same standards? Are we looking at things differently? Do we use different terminology? For example, what is an entry? The whole record, each line, each locator? In the US and the UK, indexers are paid by the entry, though that does not happen in Australia. Can we get a consensus on this? It was felt not...

This was the closing session. The meeting agreed that the conference was useful and that, as always, networking opportunities were the most useful part.

*Edyth Binkowski*