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Editor, Comments from

As this crazy year draws to a close I can think of two words that describe 2020 for me–resilience, and in spite of COVID, connection.

Part of connection for me has been volunteering with ISC/SCI and getting the opportunity to virtually meet many of the awesome members. Thank you to Alexandra Peace for her friendly enthusiasm and encouragement while I've learned the ropes as managing editor!

Looking ahead to next year I'm excited to say the date is set for ISC/SCI virtual conference 2021. Check out Upcoming Events and mark your calendar!

This issue is packed with great articles!

Carla DeSantis, co-winner of the 2020 Ewart-Daveluy Indexing Award brings us an in-depth account of her experience indexing Heather Bamford's *Cultures of the Fragment: Uses of the Iberian Manuscript, 1100–1600*.

Expert tips by Gale Rhoades on the use of Macrex, time tracking, wages, and where to connect with fellow MACREX users.

Next up, the continuation of Joanne Burek's article on how to fix common mistakes in your Find an Indexer profile.

Noeline Bridge, author of *Indexing Names*, shares her insights on the most common issues when indexing names.

Ronnie Seagren brings us news from the Central region with an excellent review of their October meeting–indexing art catalogues with Enid Zafran.

Ronnie also provided highlights from the Ethics in Publishing Conference attended by several ISC/SCI members.

In this issue's Focus On we learn more about member Stephen Ullstrom–thanks to interviewer Siusan Moffat.

Stephen also brings news of his upcoming indexing workshop, look for it in Upcoming Events.

This newsletter would not happen without the dedication of copyeditor, Gillian Watts; proofreaders Tere Mullin, and Alexandra Peace; production wizard Sergey Lobachev; translation coordinator Anna Olivier, and all the amazing contributors.

Thank you also Heather Ebbs for contributing her excellent and interesting crosswords in each issue!

Vicki Gregory

Upcoming Meetings and Events

BC region—the next meeting will be 27 January at 7 p.m. PST. For more information contact Lisa Fedorak, bc_rep@indexers.ca

Central Region—the next meeting will be January 30th from 2 to 4 p.m. EST. We'll look at what makes an award-winning index. Carla DeSantis has agreed to share her index that won the 2020 Ewart-Daveluy Award, and we'll take a deeper look at it using the award criteria. This should be an interesting learning experience for us all. For more information contact Ronnie Seagren, central_rep@indexers.ca.

Eastern Region—the next monthly meetup will be January 27th at 7 p.m. January's meeting will be a peer-review session where participants provide feedback on an index submitted by one of their peers. If you are interested or have any questions, please contact Jason Begy at eastern_rep@indexers.ca.

Mot de la rédaction

A lors que cette année touche à sa fin, je pense à deux mots qui décrivent bien 2020, à mon avis : résilience et, malgré la pandémie de la COVID, connexion.

Pour moi, cette connexion s'est concrétisée, en partie, par le travail de bénévole que j'ai fait pour la SCI/ISC, car j'ai eu l'occasion de faire la connaissance- virtuellement bien sûr – de beaucoup de membres exceptionnels. Merci à Alexandra Peace pour son enthousiasme, sa gentillesse et ses encouragements alors que j'apprenais les rouages du métier de rédactrice en chef !

En ce qui concerne l'année prochaine, je suis heureuse de pouvoir annoncer que la date du congrès virtuel de la SCI/ISC 2021 a été fixée. Consultez la section « Événements » et inscrivez cette date sur vos calendriers !

Carla DeSantis, une des corécipiendaire du prix d'excellence en indexation Ewart-Daveluy 2020 nous présente un compte-rendu approfondi de son expérience de l'indexation du livre *Cultures of the Fragment: Uses of the Iberian Manuscript, 1100–1600* de Heather Bamford.

Gale Rhoades nous donne des conseils d'experte sur la manière d'utiliser MACREX, de garder un suivi des heures, de déterminer les tarifs et d'entrer en contact avec d'autres utilisateurs de Macrex.

Vous trouverez ensuite la suite de l'article de Joanne Burek sur la manière de corriger des erreurs courantes au moment de rédiger votre profil pour la section « Trouver un indexeur ».

Noelene Bridge, auteure de *Indexing Names*, nous parle des problèmes qui se posent couramment au moment de créer un index de noms.

Ronnie Seagren nous donne des nouvelles des régions du centre, grâce à un excellent résumé de leur réunion d'oc-tobre qui avait pour thème « l'indexation de catalogues raisonnés » présenté par Enid Zafran.

Dans la section Focus On de ce numéro, Siusan Moffat nous donne l'occasion de mieux connaitre Stephen Ullstrom, un de nos membres.

Stephen nous fournit également des renseignements sur l'atelier d'indexation qu'il offrira sous peu – prenez-en connaissance dans la section « Événements ».

Ce bulletin d'information n'aurait pas pu être réalisé sans le dévouement de Gillian Watts, notre réviseure en anglais, de Tere Mullin et d'Alexandra Peace, nos relectrices, d'Anna Olivier, coordinatrice de la traduction et réviseure en français, et de Sergey Lobachev, notre génie de la production ainsi que de tous ceux qui ont apporté leur contribution exceptionnelle. Merci aussi à Heather Ebbs pour les excellents mots croisés qu'elle contribue à chaque numéro !

Vicki Gregory

Upcoming Meetings and Events

Indexing Gwich'in Oral History: A Workshop

When: Saturday, 20 February 2021

10:00 a.m. Pacific Time

11:00 a.m. Mountain Time

12:00 p.m. Central Time

1:00 p.m. Eastern Time

2:00 p.m. Atlantic Time

2:30 p.m. Newfoundland Time

Length: two hours

Cost: Free

How: Zoom link will be provided after you RSVP.

Registration: Please RSVP to Stephen Ullstrom at hello@stephenullstrom.com by Monday, 15 February. The press is providing PDFs of the chapters especially for this workshop, and only people who RSVP will receive the PDFs and Zoom link.

Oral history is an important way to preserve stories and voices which otherwise may be overlooked and forgotten. Oral history can also be challenging to index, as the way we speak and tell stories is often different from the way

we write and typically structure books. Indigenous stories are also receiving greater attention in Canada, and can contain unique considerations for indexing.

This workshop will be a guided discussion on indexing Indigenous oral history, through considering how to index two chapters from the book *Our Whole Gwich'in Way of Life Has Changed / Gwich'in K'yuu Gwiidandài' Tthak Ejuk Gòonlih: Stories from the People of the Land,* by Leslie McCartney and the Gwich'in Tribal Council (Polynya Press (University of Alberta Press imprint), 2020). The workshop will discuss a variety of topics, such as audience, term selection, exhaustivity, names and places, and Indigenous terms. Participation in the discussion is encouraged though not required.

Pre-Workshop Preparation: Please read the two chapters (37 pages) prior to the workshop. Come ready to discuss how you might index the content and why. Questions on indexing different elements can be submitted to Stephen prior to the workshop or bring them with you. Please note that you do not need to index the chapters yourself, nor will we be comparing indexes; just be familiar with the content and have some thoughts on how you would approach the index.

Your Host: Stephen Ullstrom is hosting this workshop

He wrote the index for this book, and has also indexed other Indigenous works, including the recent *Our Hearts Are as One Fire: An Ojibway-Anishinabe Vision for the Future,* by Jerry Fontaine (UBC Press, 2020), a book which was largely written in the Ojibwaymowin language. He has been a freelance indexer for eight years and is on the executive of the Indexing Society of Canada as the prairie representative. Stephen lives in Edmonton, on Treaty 6 territory.

2021 ISC/SCI Virtual Conference

Indexing Unlimited, the 2021 conference, will take place virtually on May 27, 28 and 29, 2021.

Ten interactive sessions will take place over three days. Presenters are experienced, award-winning indexers from around the globe plus others with expertise in areas relevant to indexers. At the time of writing Mary Coe, Judy Dunlop, and Kate Mertes are confirmed.

Topics include quoting on projects, retaining clients, improving index quality, and moving the profession forward.

For very new indexers and those exploring indexing as a career, a Fireside Chat will provide an intimate opportunity to ask questions of an experienced indexer.

Options for networking will provide opportunities for indexers to speak with others with similar interests and there will be some of the fun and games that ISC/SCI is known for!

Watch your email or the conference website https://indexers.ca/annual-conference/ for announcements of the full slate of presenters, registration fees, and the early-bird deadline.

Members Monthly Video Chat

The national monthly video chats are being held every month on the second Saturday. Dates and links can be found on the website (https://indexers.ca/events/) under upcoming events on the home page.

Executive Committee Meeting

The next executive committee meeting will be held on Saturday, 6 February 2021. Please let your regional rep know if you have any questions or concerns for the executive committee.

Cindex Study Group

We're off to a great start with our Cindex study group! Whether you're a beginner or veteran, lots of information and advice, as well as on-screen illustration, will be offered. Cindex can do worlds more than simply format and alphabetize—blessings in themselves.

Join us to learn and exchange ideas. Experts will be on hand to teach and answer questions.

For more information and to register, please contact Ronnie Seagren at ronnie.seagren@gmail.com

President's Message

Alexandra Peace

I hope everything is as well as can be expected with all of you. The second wave has just started here in Nova Scotia, so it's back to being extra, extra careful!

I'm so grateful for the regional representatives who have pivoted to Zoom meetings with hardly a blink, and for the monthly national video chats. It's fun to ask colleagues about the various indexing challenges that we bump up against. It's also fun to pass on tips and tricks that we have learned along the way.

We have been having a huge success attracting volunteers. Because the Society is volunteer-run, anything we want to accomplish depends on the number of volunteers. These days we are happy to be accomplishing so much— because of all of you!

TIDE is ticking along very well, as I'm sure you can see from the articles in the *Bulletin*. And we will be starting a webinar program next year, based on Wendy Savage's great report. The Conference Committee is also working hard to produce a super conference for you next year. It will be online in 2021, but don't worry, I'm hoping that a visit to St. John's, Newfoundland and Labrador, is still in our future!

ISC/SCI belongs to ICRIS, the International Committee of Representatives of Indexing Societies. This gives us a window into what is happening in the wider world of indexing. Usually ICRIS has formal meetings every three years, but the co-coordinators have postponed it from 2021 to 2022. And usually there are informal meetings at various conferences between the Triennials. These help to maintain our connections and deal with small issues as they arise. Because we are not meeting in person, we are planning to hold some informal online meetings using video-conferencing software. I am looking forward to seeing my international counterparts at these meetings!

By the way, don't forget to think about your best efforts and get a chance for some feedback. Information on the Ewart-Daveluy Award is on page 10.

As always, we are working to raise the profile of ISC/SCI in the publishing industry in Canada and among people who hire indexers. We hope these efforts are getting you work! We recently decided to spend some money on advertising at the Congress of the Humanities. We hope this will remind authors that we can take care of their index— they can leave it to us! We will be getting some tracking results from that, so we may be able to see whether the ad is worth the expense.

I look forward to seeing you at the monthly video chat. If you can't attend but have something you need to ask, do connect with your regional representative.

Thanks to all the volunteers for the hard work that goes into keeping this organization running.

Cheers,
Alex.

Messages de la présidence

Alexandra Peace

J'espère que vous allez tous aussi bien que possible, au vu des circonstances actuelles. La deuxième vague vient de débuter ici en Nouvelle-Écosse et il faut donc, à nouveau, faire preuve d'une extrême prudence !

Je suis ravie que les représentants régionaux se soient habitués aux réunions Zoom, sans avoir apparemment trop de problèmes et j'apprécie également énormément nos visioconférences nationales mensuelles. Je trouve très intéressant de discuter avec nos collègues des divers défis auxquels ils font face dans le cadre de leur travail et cela nous donne l'occasion d'échanger des idées et les petites astuces que nous avons apprises en cours de route.

Nous avons eu des résultats incroyables en ce qui concerne le nombre de bénévoles qui ont offert leurs services à la Société. Comme notre Société est entièrement gérée par des bénévoles, ce que nous pouvons accomplir dépend en fait de l'aide dont nous bénéficions. Nous vous sommes vraiment reconnaissants, à vous tous, de tout ce que vous faites à l'heure actuelle, car nous accomplissons énormément de choses !

Notre comité sur l'inclusion, la diversité et l'équité (TIDE) avance bien dans son travail, comme le montrent les articles inclus dans le *Bulletin*. Nous lancerons également un programme de webinaires l'année prochaine, basé sur l'excellent rapport de Wendy Savage. Le comité responsable de l'organisation du congrès travaille également beaucoup pour préparer une conférence de qualité l'année prochaine. Cet évènement se tiendra en ligne en 2021… mais ne vous inquiétez pas, j'espère que nous aurons l'occasion de visiter Saint-Jean de Terre-Neuve en personne à l'occasion !!

La SCI/ISC fait partie de l'ICRIS (*International Committee of Representatives of Indexing Societies*). Ceci nous permet d'avoir un aperçu de ce qui se passe dans le monde de l'indexation au niveau international. L'ICRIS organise normalement des réunions formelles tous les trois ans, mais les coordonnateurs ont remis la réunion de 2021 à 2022. En outre, l'ICRIS organise généralement également des réunions informelles entre temps, lors de diverses rencontres. Ces réunions informelles nous aident à rester en contact et à régler des problèmes mineurs au moment même où ils se présentent. Comme nous ne nous réunirons pas en personne, nous avons l'intention d'organiser des réunions en ligne à l'aide de logiciels de visioconférence. Je me réjouis de pouvoir discuter avec des collègues d'autres pays à ce moment-là !

N'oubliez pas de réfléchir à vos meilleurs index et de profiter de l'occasion de recevoir de la rétroaction. Vous trouverez des renseignements sur le prix Ewart-Daveluy en page 10.

Nous continuons à travailler pour faire mieux connaitre la SCI/ISC dans l'industrie de l'édition au Canada et aux personnes qui engagent des indexeurs. Nous espérons que nos efforts vous ont déjà permis de trouver davantage de travail ! Nous avons récemment décidé de mener une campagne publicitaire au Congrès des sciences humaines. Nous espérons que ceci rappellera aux auteurs que nous pouvons nous occuper de leurs index et qu'ils peuvent nous faire confiance ! Nous procèderons au suivi des résultats de cette campagne publicitaire, ce qui nous permettra de déterminer si elle en vaut la peine.

Je me réjouis de vous voir bientôt lors de notre visioconférence mensuelle. Au cas où vous ne pourriez pas y participer, mais que vous avez une question à poser, veuillez contacter votre représentant régional.

Merci à tous les bénévoles pour tout le travail qu'ils font pour notre organisation.

Sincèrement,

Alex

Summary of Executive Committee Meeting, 21 November 2020

by Alexandra Peace

November's executive committee meeting was supposed to be a short one to discuss conference information and go through the action items, but of course we found some other things to talk about!

The only report in the consent section of the agenda was from Margaret de Boer, on the latest info from the Book and Periodical Council. Under the discussion section of the agenda, Julia White brought a question about Liverpool University Press and its advertising to members. It was decided that they would not be allowed access to the members list.

Next we discussed the conference. It will all be online and the dates have been determined. The Ewart-Daveluy Award will be presented at the conference, but the AGM will be held at a separate time.

Wendy Savage had forwarded an excellent initial report on the beginnings of a webinar program for ISC/SCI. The executive committee discussed the information at length. The next step will be to bring a draft of policy and procedures to the executive committee.

The amended Bulletin Policies and Procedures document was brought to the committee for approval. I talked about beginning to gather the ICRIS reps for informal meetings between now and the Triennial meeting. I also brought the emeritus certificate to the executive committee for discussion.

Sergey Lobachev requested through his regional rep that we discuss what ISC/SCI could do for members who are having trouble getting paid. Various strategies were discussed; the executive committee will discuss this again after more information has been gathered. Finally, JoAnne Burek asked us to look through our Dropbox folders to remove duplicate documents.

We had three new pieces of business to discuss, including a survey of rates that Lisa Fedorak and Martin Gavin are working on. It will be based on the survey from 2008 and updated.

Stephen Ullstrom spoke of a special meeting he would like to hold that will be of interest to members. The executive committee was happy to hear about it and give him the go-ahead.

Sergey Lobachev had been asked to provide information about advertising at the Congress of the Humanities; the executive committee decided this would be a worthwhile expense. We will be given tracking information from the Congress, so we will be able to determine whether to continue this in the future.

Finally, we went through the action items, updating their status and hearing about the results.

All in all, a great meeting, and evidence of lots of important work getting done!

The Indexer

The International Journal of Indexing

Volume 38.4 (December 2020)

The Indexer
The International Journal of Indexing
Vol. 38, No. 4, December 2020

Print ISSN 0019-4131
Online ISSN 1756-0632

www.liverpooluniversitypress.co.uk/r/index

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Start 2021 with a Ewart-Daveluy Indexing Award Submission

by Mary Newberry

Signal a change for 2021 by choosing the best of your work of 2020 and submitting it for the Ewart-Daveluy Indexing Award. Give yourself something good to remember about this difficult year. The deadline is Monday, 22 February 2021.

In 2020 we had a record number of high-quality applications—so many that we had two winners. So keep the applications coming! We encourage you to think back over the year to that index that carried you away—maybe not necessarily the most complex material, but a book that presented a particular challenge to you as the indexer. One that inspired you to employ great efficiency of space, or extreme simplicity because you knew the material would be sought under stress, or creativity because of the author's unusual presentation. Or the one where you're sure you got it all right.

Last year was the first year for the online application, and it's never been easier. You don't need a hard copy; a PDF of the book with the index is enough. Submission costs $30 and we provide feedback for up to three runners-up. That's feedback from three experienced indexers!

Show us how you creatively overcame challenges, resulting in an outstanding well-structured, easy-to-navigate, clear, and comprehensive guide for all of its users. And if you're thinking "No way, I'm too new at this!" let us point out that one of 2020's award winners, Carla DeSantis, had written only one other index. She was just hoping for the feedback. The other winner, Anna Olivier, who has been indexing since 2009, submitted a French text—a first for the award.

Give us a challenge. You have nothing to lose and everything to gain. Maybe you'll get the prize, but that won't happen if you don't apply. And if not, you're very likely to get confidential expert feedback. That's worth a lot.

Débutez 2021 par une candidature au prix d'excellence en indexation Ewart-Daveluy

by Mary Newberry

Faites de 2021 l'année du changement ; choisissez votre meilleur index et soumettez-le pour le prix Ewart-Daveluy. L'année 2020 ne vous laissera pas que de mauvais souvenirs ! Date limite de dépôt de candidatures : lundi 22 février 2021.

Nous avons, en 2020, reçu un nombre record de candidatures de grande qualité ; nous en avons reçu tellement que nous avons choisi deux gagnants. N'hésitez donc pas à nous envoyer votre candidature. Nous vous encourageons à réfléchir à l'index qui vous a le plus inspiré, pas nécessairement l'index qui traite du contenu le plus compliqué, mais l'index d'un livre qui vous a posé un défi particulièrement difficile. Un index qui vous a obligé à analyser le contenu d'un livre en tenant compte de contraintes en matière d'espace, ou dans une optique de simplicité extrême, car vous saviez que les recherches de contenu se feraient en situation de stress ou encore avec créativité, car la présentation de l'auteur était plutôt inhabituelle. Ou encore, un index qui vous a donné l'impression d'avoir vraiment fait un très bon travail.

Nous avons, l'année dernière, inauguré un système de candidatures en ligne. Le processus est extrêmement facile. Il n'est plus nécessaire de nous envoyer une copie imprimée : un PDF du livre contenant l'index suffit. Et cela ne vous coûtera que 30 $. Trois indexeurs expérimentés donneront une rétroaction sur les index aux trois finalistes.

Montrez-nous comment vous avez surmonté les défis avec créativité et créé un guide exceptionnel, bien structuré, convivial, clair et détaillé destiné à tous les utilisateurs. Vous pensez certainement : « Pas question, je n'ai pas suffisamment d'expérience ! » Je voudrais mettre l'accent sur le fait que Carla DeSantis, l'une des gagnantes du prix 2020, n'avait rédigé qu'un seul autre index auparavant. Elle espérait tout simplement recevoir la rétroaction d'indexeurs plus expérimentés. Anna Olivier, l'autre gagnante, indexeure depuis 2009, a soumis un texte en français. C'était également une première dans le cadre du prix Ewart-Daveluy.

Donnez-nous un défi à relever. Vous n'avez rien à perdre et tout à gagner. Vous gagnerez peut-être le prix (ce qui ne sera pas possible si vous ne posez pas votre candidature). Et même si vous ne gagnez pas, vous recevrez très probablement la rétroaction confidentielle d'indexeurs expérimentés. Cela en vaut la peine.

Ewart-Daveluy 2020 co-winner Carla DeSantis

by Carla DeSantis

I am very grateful to the Indexing Society of Canada/ Société canadienne d'indexation (ISC/SCI) for awarding me the 2020 Ewart-Daveluy Indexing Award for my index to Heather Bamford's *Cultures of the Fragment: Uses of the Iberian Manuscript, 1100–1600* (University of Toronto Press, 2018). I was both honoured and surprised—honoured because I know that the calibre of the other entries was high, and surprised since, as a relatively new indexer, I was hoping at the most for some constructive professional feedback on my indexing practice. I still consider myself at the early stages of my indexing career, so the validation offered by this award is invaluable to me.

This book was both a pleasure and a challenge to work on because it incorporates two of my specialty areas, Spanish and medieval manuscripts. For this I must also acknowledge and thank the author for creating great, interesting content to work with.

My index for *Cultures of the Fragment* was the second index I have written. As a scholarly editor, I found that author clients whose books I was copy editing for university presses frequently asked if I could also prepare their index at the end of the project. Although I had previously written an index for my own scholarly monograph, as an editorial professional I now realized that particular index amounted to more of a concordance. Therefore, I initially declined these potential indexing clients, as I recognized that creating an adequate professional index requires a certain amount of instruction, training, and research of theory and best practices.

However, the idea of potentially offering this service stayed with me, and the complex exercise of organizing textual material and analyzing it in a coherent, concise, and useful way for the reader—that is, indexing—intrigued me. I wanted to be part of this additional step in the publishing process. I received training, read as much as I could about indexing, and said yes the next time an editing client asked if I could index her book. *Cultures of the Fragment* was the second of these.

Carla DeSantis. Photo provided.

So I approached indexing this book with the advantage of having already read it carefully and thoroughly as the copy editor. This background was a great help in that I already had a firm grasp of the topics, themes, and names in the book. As a new indexer, I followed the advice to mark up the PDF before actually writing the index. I first worked through the document, highlighting possible main headings in yellow and possible subheadings in pink, and using text boxes in the margins of the PDF to indicate implicit connections and page ranges.

This index presented many challenges due to the complex nature of the subject matter. Special care had to be taken in correctly presenting proper names, titles (many anonymous), and terms in Latin, Spanish, Arabic, Aljamiado, and French— and their English translations, when appropriate. Another challenge was posed by individual medieval manuscripts cited by their shelf marks; these were listed under their specific libraries (with *see* references from the commonly used acronyms), in addition to double postings for individual manuscripts under pertinent headings. My previous academic training in Latin, Spanish, and medieval manuscripts gave me the necessary familiarity with such content to handle the terms and subject matter properly. Writing my first index—for Mohammad Jafar Amir Mahallati's *Ethics of War and Peace in Iran and Shi'i Islam* (University of Toronto Press, 2016), a book that I had also copy edited—had provided me with some background in dealing with Arabic terms and names that I could draw upon when indexing *Cultures of the Fragment*.

While the metatopics *fragments* and *manuscripts* pervade the entries, they had to be treated individually for the reader's sake. As such, they had to be broken up into more specific topics (especially manuscripts), since the publisher did not want sub-sub-entries. The contents of the 13 illustrations were distinguished by locators in italics.

And now, here is my confession: As a beginning indexer, not knowing if this new career would pan out for me, I was hesitant to invest in designated indexing software

right away. As a result, this index was created "manually" in MS Word, relying on the power of my memory and the search function in Word. Since ISC/SCI has recognized the merits of this particular index, I think it goes to show that, although much more labour-intensive, it is in fact possible to write a useful index without such software. However, since I now use CINDEX, I am fully aware of the many advantages and indispensable features that such software offers the professional indexer, and I would not go back! (I also no longer highlight the PDF.)

Although I am sure that there may still be ways to perfect this index further, the author and publisher were happy with the product and it serves the reader's needs, which was this indexer's goal. The year 2020 was good for *Cultures of the Fragment,* as it was also awarded the 2020 *La corónica* International Book Award—congratulations to Heather! I have now moved on to writing indexes for books that I have not also copy edited, and my specialization in

multilingual texts (Latin, Spanish, Italian, and ancient Greek with English) seems to have carved out a niche for me in the indexing world. I am still learning and tweaking my indexing practice; as a member of ISC/SCI, I am grateful for the learning opportunities, collegiality, and support offered by the Society in my indexing endeavours. I look forward to many more years of involvement!

Carla DeSantis is an editor, indexer, and translator based in Toronto. She specializes in scholarly and academic texts, especially multilingual texts, has published on medieval Latin topics, and is the author of the blog Parchment to PDF.

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Word on the Street (WOTS) 2020 Toronto

ISC/SCI Member Gillian Watts was interviewed on Instagram Digital Soapbox at the Word on the Street (Toronto) virtual event in September.
WOTS is an annual festival held in various locations across the country celebrating the best of Canadian books and magazines. This year's events went virtual due to COVID. Click here to learn more about WOTS (Toronto).

Do You Make These Mistakes in Your Profile?

by JoAnne Burek

My friend who has a web design company told me that he will build websites only for clients who work with professional copywriters. Why? "Because most small businesses are emotionally attached and have a difficult time balancing bragging with informing." Indeed, we can end up lurching between bragging and saying nothing at all—because we're afraid to look like we're bragging. And the result is that we miss the opportunity to give the reader truly useful information that would give them reasons to hire us.

The other problem with writing about ourselves is that we have a limited space to do it in. If you remember from my previous article, we have just a 70-word statement on the Find an Indexer listings page to set ourselves apart from the rest. But what's even more limiting is that the reader has only so much time and patience to wade through our words. If we write too many "nothing" statements in our profile, we're really pushing it. The busy, overwhelmed prospective client will skim through our writing—maybe with glazed eyes—and they'll miss the good stuff.

As a copywriter, I love reading other indexers' profiles on our Find an Indexer page and in ASI's Directory of Indexers. Many times I have felt like I want to have coffee with the person because they sound so interesting. But occasionally, when I reread the profile through the eyes of a person wanting to hire an indexer, I don't always get that feeling.

That's because the profile has missed the mark. It fails to get right to the point with useful information, and it may even give a negative impression. And that's usually because of one or more of the following six mistakes.

Mistake #1: "Why you need an index for your book"

***Maybe indexers like to explain the value of an index because it allows them to demonstrate their approach to the index—their goals for the index, perhaps. But remember who your target audience is.

You're talking to people who are already motivated to hire an indexer. They don't need confirmation or education. That makes this is a nothing statement, taking up valuable space in your first 70 words.

Cut these words from your profile, but save them for another good cause. You can write a blog post or a LinkedIn article, or both, about the value of an index. Then at the end of your profile, you can link to it.

JoAnne Burek. Photo provided.

Mistake #2: "I index in a range of topics" or "My interests are wide"

This, again, is a nothing statement to the motivated client looking for an indexer. They want someone who can index their book, which is not the same as "any book" or a "wide range" of books.

It's a statement that's all about you, and not about the client's needs.

If your range of specialties is varied, it will be obvious that your interests are wide.

Mistake #3: "My rates are competitive", "Indexes delivered on time and to your specifications"

These are nothing statements because they don't set you apart from anyone else. It's a given that your rates will be competitive for the particular book you are indexing, that you will meet the deadlines or you wouldn't have accepted the job, and you will meet the specifications because you aim to satisfy the client. We all do that.

Furthermore, you don't want to imply that other indexing businesses overcharge and ignore deadlines and clients' wishes. Because that's not credible.

But what you can do is this: On your website's Services page (which you can link to from your profile), describe your process that ensures that your rates are competitive (for example, you carefully examine a few chapters before you give a quote), and that clients' wishes are discussed and considered (your consultation process).

Mistake #4: "Excellent", "high quality", "professional"

One reason that these adjectives don't work for us is

because in our industry, they're not unique qualifiers for our indexes. We don't offer "low-end", "cheap", "quick and dirty", or "bronze-level" indexes. Not intentionally, that is.

The other reason these adjectives don't work is because it clearly is bragging. So how do we say this objectively about our work? We don't. But our clients do.

This is where testimonials come in. You can add a few near the end of your profile.

Mistake #5. Putting your website URL in the 70-word excerpt

No prospective client is going to click to your website without having first read your profile. They first want to see if it would be worth their while. A better place for your website name is at the very end of your profile. In fact, your URL should be that last thing in your profile. It will give the reader something to do after they have read all about you.

Mistake #6: "Seeking new clients"

Doesn't this sound desperate? Prospective clients probably think so.

The second problem is that it's a statement that's all about you. It doesn't address the client's need.

The third problem is that it's a nothing statement. Everyone on Find an Indexer is seeking new clients, or else they wouldn't be listed.

Speaking of not looking desperate, here's a bonus tip.

When you write your profile, think aspirationally.

This is why your profile is not your CV. It's just the opposite—it's forward-looking. It's like the dress-for-success motto; "Dress not for your current job, but for the job you want next."

You can dress for success by adopting the mindset of the successful indexer you aspire to be. When you're writing your profile, and any time that you're communicating with a prospective client, live it.

JoAnne Burek is an indexer and copywriter specializing in website copy and other online media. She also helps new freelancers market themselves. You can sign up to receive her regular emails on marketing tips for freelancers at Wordbeats.com.

Ethics in Publishing Conference at George Washington University

By Ronnie Seagren

According to a study by Publisher's Weekly (US), "the industry's racial makeup became slightly more diverse last year—though, with whites comprising 84 percent of the workforce, publishing remains an overwhelmingly white business." Members of colour tend to be newer: "Nineteen percent of members of color said they have been in publishing for three years compared to 10 percent of white members."

Several of us attended parts of the three-day **Ethics in Publishing Conference**, October 28–30, thanks to Siusan Moffat's sharing of the invitation on our list. Here are a few highlights.

Opening plenary about university presses

The opening plenary address was given by Peter Berkery, the Executive Director of the Association of University Presses (AUP) in the US. The other sponsors were the Society for Scholarly Publishing and the Association of American Publishers. AUP publishes a lot: 12,000 books and 1,500 journals last year in 17 countries. He discussed

> " Commercial publishers produce books to make money; university presses make money to publish books.
>
> *Alison Mudditt* "
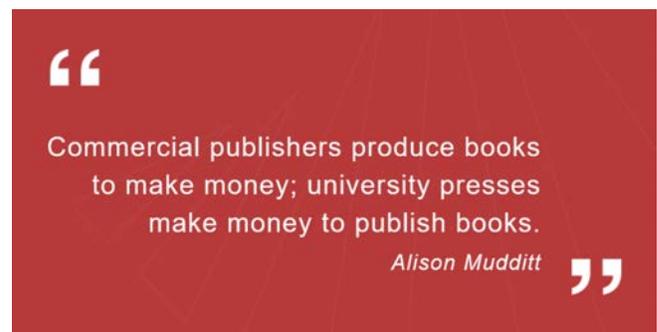
the following ethical imperatives of university presses.

As of last year, they redefined their core values to support and advance the global knowledge ecosystem through each parent institution. He shared the four-part model at the right for the ethical imperatives facing university presses. They are no longer concerned just about diversity in **what** they publish, but about **how** they include diverse people at all stages of publishing.

Barbara Kline Pope and Katrina Caldwell of Johns Hopkins University Press brought this down to the

particulars of how this works at her press, for example, making sure that all meetings are safe and welcoming for all. Here is their road map:

The specific values that help them accomplish this are (1) honouring each person's inherent dignity; (2) proactively

How do we create positive cultural change?

| Examine institutional policies and practices. | Review spending and governance habits. | Assure equitable accessibility to resources. |

dismantling barriers to **equity, justice and inclusion**; (3) inspiration (bursts of creativity and new ideas that ignite ingenuity and propel us forward); (4) boldness (publishing courageously, championing academic freedom, and giving voice to groundbreaking ideas); and (5) collaboration (supporting each other and our stakeholders).

To accomplish this, they underwent a process of assessing their organizational culture. To find their shared basic assumptions, they did in-depth interviews and workshops, and then mapped them on a *Harvard Business Review* framework. They found they leaned more toward the ones circled in red and they wanted to foster the aspects circled in green. (If you're interested in corporate culture, you might want to check out the model here.)

I was interested in how they define dignity (from Donna Hicks' *Leading with Dignity)*: It's an attribute we are born with, our inherent value and worth. This provided common language to talk about dignity and fairness, and it gives a way to understand others' lived experiences.

Publishing and inclusive language

Questions of inclusive language are quite relevant to our work; just last week an indexer questioned the language of a book she was indexing. This conference panel included Beth M. Bouloukos (Director of the Amherst College Press and Lever Press), Elizabeth Crowley Webber, (Senior Production Editor at Georgetown University Press), and Ana Jimenez-Moreno (Acquisitions Editor at The Ohio State University Press).

Inclusive language is about using wording to strategically include people who might otherwise be excluded, and not about political correctness to avoid offending people. It's imagining the widest possible readership for a book. Open access publishing is way beyond specialized scholarly readers. It also affects how we address publishers and authors at every stage.

For a press, inclusive language starts with intentionality in acquisitions as well as editing. Presses are posting jobs on the Editors of Color site to diversify the copyeditor pool. Many problems are on the word by word and sentence by sentence level. It involves using bias-free language, such as "they" instead of gendered pronouns, "older adults" instead of "senior citizens" or "aging dependents," and the appropriate level of specificity; other examples are "people

The Ten Essential Elements of Dignity

- **Acceptance of Identity** — Approach people as neither inferior nor superior to you; give others the freedom to express their authentic selves without fear of being negatively judged; interact without prejudice or bias, accepting how race, religion, gender, class, sexual orientation, age, disability, etc. are at the core of their identities. Assume they have integrity.

- **Recognition** — Validate others for their talents, hard work, thoughtfulness, and help; be generous with praise; give credit to others for their contributions, ideas and experience.

- **Acknowledgment** — Give people your full attention by listening, hearing, validating and responding to their concerns and what they have been through.

- **Inclusion** — Make others feel that they belong at all levels of relationship (family, community, organization, nation).

- **Safety** — Put people at ease at two levels: physically, where they feel free of bodily harm; and psychologically, where they feel free of concern about being shamed or humiliated, that they feel free to speak without fear of retribution.

- **Fairness** — Treat people justly, with equality, and in an evenhanded way, according to agreed upon laws and rules.

- **Independence** — Empower people to act on their own behalf so that they feel in control of their lives and experience a sense of hope and possibility.

- **Understanding** — Believe that what others think matters; give them the chance to explain their perspectives, express their points of view; actively listen in order to understand them.

- **Benefit of the Doubt** — Treat people as trustworthy; start with the premise that others have good motives and are acting with integrity.

- **Accountability** — Take responsibility for your actions; if you have violated the dignity of another, apologize; make a commitment to change hurtful behaviors

with autism" and "people with deafness" rather than "autistic people" or "deaf people." The recent APA Style Guide is helpful on this.

An editor often has to open a conversation with authors about terms and using house style guides to avoid exclusion, to reflect how people refer to themselves. For example, "I don't think you want to imply that all doctors are men." Or "Before I meddle, would you mind if we make this change (with a link to APA)?" This helps get buy-in from the author before you send a red-lined manuscript. An editor might point out that none of the citations are recent or from the marginalized groups the book is about, or might suggest changes to visuals. You might find *The Subversive Copy Editor* a helpful resource.

As indexers, inclusive language affects our work. How do we help all the readers find what they need? Do we need to alert the editor to anything?

Antiracism toolkit for allies: steps, springboards and sparks

This panel was based on the experience of Randy Townsend (Director of Publications Operations, American Geophysical Union, AGU), Margaret Fraiser (Director of Diversity and Inclusion, AGU), and Nicole Leilanionapae'aina Coggins (Assistant Project Editor, University of Virginia Press).

Scholarly publishing and communications professionals in 2016 were 70%–91% white. Because of this, people of colour will inevitably experience racism at some point. ISC/SCI is taking some steps to remedy this situation in our profession. People of colour experience low-paid or unpaid internships which are barriers to low-income people, networks that are already in place, and search committees give priority to those with experience (unpaid internships) rather than transferable skills.

The Coalition for Diversity & Inclusion in Scholarly Communications has created a Antiracism Toolkit for Allies, and they're working on toolkits for organizations and BIPOC people. They've also created guides for transitioning professionals, institutions, and coworkers on gender transitions. They define their principles—listed here. They define an ally as a person who (1) becomes conscious of white advantage, (2) listens to people of colour without judgment, (3) moves out of social segregation and develops truth-telling relationships of accountability, (4) takes action to interrupt racism at all levels, and (5) creates work communities where everyone thrives. These were illustrated with examples from publishing.

The session was quite concrete. To provide feedback, they recommend LARA-style active listening: listen, affirm to provide connection, respond, and ask questions or add information. To respond to criticism, they suggest

> Develop a culture of appreciation, where the organization takes time to make sure that people's work and efforts are appreciated; develop a learning organization, where it is expected that everyone will make mistakes and those mistakes offer opportunities for learning....
>
> —Tema Okun

acknowledging what went wrong (no "but" or "if"), thanking for input, and apologizing by action to mitigate the impact. A good source of tactics when you see racism is ihollaback.org–distract, delegate, document, delay, and direct. You can move from being a **bystander** to being an **upstander**, and deal directly or indirectly with the target of situations you see. You can address microaggressions, and check in with the person afterwards, ask how you can help. Tema Okun's principles show how "white supremacy culture" creates norms or standards that are damaging to both white and non-white people.

Becoming an ally requires brutal honesty about the advantages that whiteness brings. US unemployment rates went down for White and Asian people in September, but **not** for Black, Indigenous, and Latinx people, who are bearing the brunt of the pandemic. Being professional isn't divorced from what's going on. Allies need to, as Ta-Nehisi Coates and Roxane Gay put it, "stand up and take on the problems borne of oppression as their own … even if they cannot fully understand what it's like to be oppressed for their race or ethnicity, gender, sexuality, ability, class, religion, or other marker of identity."

There are three levels of action: personal education and awareness; institutional barriers; and address cultural change. As individuals, expand your comfort zone, learning on your own. It requires humility, and discomfort as an opportunity to learn and grow. A good resource is *What if I say the Wrong Thing? 25 Habits for Culturally Effective People* by Verna Myers. Cultural transformation starts at the personal level. The images at the right address what

What can we do as individuals?

Listen.	Educate yourself on the issues.	Expand your comfort zone.	Understand that some experience current events differently.	Use your privilege for good.	Identify ways to make inclusive decision -making.

individuals can do and how people can help create positive cultural change in organizations and institutions.

In their staff discussions at AGU, they aim for a safe place to learn and gain support, with plenty of "space for grace" and support for discomfort as an opportunity to learn and grow.

Accessibility in publishing

Bill Kasdorf, a long-term expert on accessibility in publishing, explained that there are ten times as many blind people as redheads, and ten times as many dyslexic and low-vision people as blind people. The goal is that people with print disabilities should get the same publication at the same cost from the same retailers, aggregators, or libraries at the same time as everybody else.

In the past special formats and markups were needed. Teachers still sometimes have to crack the spines off books and scan with OCR to make them accessible, which is ridiculous because the book was a file before being printed!

The current alignment of accessibility with web standards (Open Web Platform/OWP, WCAG and WAI-ARIA) and the ePub working group are making this possible. PDFs aren't essentially accessible, although they're still the standard form for exchanging documents; this will eventually move to ePubs. Most vendors know how to make standard ePub3 books, which are inherently accessible. However, the most important elements for publishers are including meaningful <alt> tags for images (there are many bad practices here) and using heading levels based on structure, not presentation. If you do so, you can use Word to ePub converters.

Educational texts are the most challenging but also face government mandates. Scholarly is closer to accessibility than most people realize, because the content is well structured and metadata is common. Hachette Press puts lots of pressure on vendors for accessible texts. Anansi Press has global certification. The systems need to be accessible as well, including staff, authors, service providers, and dissemination partners. Tools like Word and InDesign are getting much better at producing accessible texts. For more information about accessibility, one good source besides the standards is inclusivepublishing.org.

An indexer asked about why index links are often stripped, especially in Amazon's CreateSpace. He had an interesting perspective. A back-of-the-book index points to locators (page numbers or legal section numbers), and one fundamental accessibility requirement is to include page break markers in their ePubs. Many vendors do this standard. The DAISY knowledge bank shows you the syntax of page break markers–it's an empty element with

a span, put at the transition between the last word on one page and the first on the next. Accessibility needs that anyway: Students are told to read pages 53-87 for the next class or to turn to page 72, and they need to know where it is. It's not the page in an e-book that adjusts its pagination. The index references that print-equivalent page number. Techies say why do you want page numbers, which is a print artifact? But print is often the dominant version of a book. Scholarly monograph vendors were appropriately linking the page numbers to this element. Cross-references in text refer to page numbers, reviewers refer to page numbers, etc. Some vendors routinely do this. I must admit that I must be one of those "techies" who has thought that the target of a link should be the content, and now I'm thinking about his approach. I personally would be interested in your thoughts or experience with this.

And there was more …

All the conference presentations are available on YouTube. Although the conference took place in an American university, Canadian publishing has a lively dialogue going about these issues as well.

If you edit or teach as well as index, you might be interested in some of these presentations:

Peer review: The American Psychological Association (APA) did a session on ethics in peer review during COVID-19.

Author harassment: The American Geophysical Union explained how they've updated their policies to incorporate a definition of scientific misconduct that includes discrimination, harassment, and bullying to transform workplace culture at scientific institutions to provide healthy environments for research and writing.

Millennials and manipulation: Josephine E. Sciortino (Managing Editor, Canadian Science Publishing) examined plagiarism and how students tend to follow what senior researchers do. Yael Fitzpatrick (Gazelle Design Consultancy) explained how you develop a "spidey sense" for misconduct involving manipulation of images and maps.

Open educational resources: Christopher J. Harris Jr (Communications Instructor, Thomas Nelson Community College)

Ethics and unethical behaviour: Danielle Galian (Editor, Galian Omnimedia) talked about advertorials and "native advertising" and emphasized that the reader must be informed. Her ethical guidelines included labelling with "sponsored content" or "sponsored post," writing the brand into the byline, and avoiding sales-y language. Erin Price (recent GWU grad) on Ethical Web Writing talked about how search engines determine page ranking, keyword stuffing, and clickbait, and the need to provide value.

And for your future travel

And if, after our current COVID period, you ever plan on travelling to the US capital, Washington, you might want to get Dr. Elizabeth Rule's app that provides an Indigenous Guide to DC. She curated the communal knowledge as well as historical research and oral history to celebrate the diversity of Indigenous people in the US and the long history of Indigenous people in that area. Accessibility features such as text-to-speech, and geolocation provides the ability to tour through the map with 360-degree images. Lots of back-end analytics will be used as it continues to evolve.

Focus On … Stephen Ullstrom

by Siusan Moffat

How long have you been indexing?

I wrote my first index the summer of 2011. I was an Arts co-op student at Harbour Publishing on the Sunshine Coast, north of Vancouver, and I asked to write an index as part of my learning experience. It must have been good enough, as I was soon asked to write another. Before Harbour, I was first introduced to indexing earlier in 2011 during a co-op work term at UBC Press, where I edited and proofread indexes that had been submitted for publication.

How long have you been a member of ISC/SCI?

Since late 2012. When I left Harbour at the end of October with the goal to freelance, they bought me a membership as a farewell gift. I was really surprised, as I had no idea the Society existed. I am very glad that Harbour helped make that connection for me.

Where did you get your indexing training?

Initially I learned on the job. At UBC Press I was handed an index to edit, the press's indexing guidelines, and the Chicago Manual of Style chapter on indexing, and was instructed to ask if I had further questions. At both UBC Press and Harbour I would occasionally receive feedback from my supervisors. I also did not use any indexing software at Harbour—I would mark up the proofs, type the whole index into Word, and then edit and proofread. It was a slow process, but I think being so hands-on helped ground me in the thousands of details that make an index work. Later I did take the indexing course at Simon Fraser University, partly for confidence as I started freelancing, partly to see if I had some blind spots in my knowledge, and partly for the credential, for my marketing efforts.

Which indexing software do you use?

I use CINDEX. I find it intuitive to use, and it was also the only software at the time that was Mac compatible (with the caveat that Parallels for Mac is also an option), so it was an easy decision.

What did you do before you started your indexing career?

I was a student mostly. I completed my BA at the University of British Columbia in creative writing and

Stephen Ullstrom. Photo provided.

political science. I was also a tree planter for two summers in northern BC, taught English in Taiwan for another summer (never again), planned and ran a summer day camp for teens with various disabilities, and spent a year at the academic journal Canadian Literature before UBC Press and Harbour Publishing.

What was it that attracted you to indexing? Why did you think it would be a good fit?

I feel like I stumbled into indexing and made a snap decision to start freelancing. There wasn't much of a plan and I've had to learn the business side of things as I've gone along.

When I left Harbour, I wanted to return to Vancouver to be closer to my parents, who were temporarily in town for the year (they normally live and work in Taiwan). However, just a month or two before I was due to leave, the largest trade publisher in Vancouver, Douglas & McIntyre, declared bankruptcy, leaving most of their employees unemployed. I decided I was unlikely to find another publishing job with so much competition, so I chose to focus my efforts instead on building my own business.

Having a greater sense of independence definitely appealed to me, though as a freelancer it can be easy to let clients' deadlines dictate your schedule. I also liked the challenge of seeing if I could earn enough to support myself. As for indexing, I enjoy the intellectual puzzle of piecing an index together, as well as the fact that there is a craft aspect to indexing that can continually be improved. And, of course, the chance to read widely. It can be difficult to turn down an interesting project.

What do you hope to do next that isn't related to indexing?

I want to write and publish books. My ideal right now is to have a dual career as an indexer and author. I'm currently working on a book for authors about indexing, which I plan to self-publish. I am also developing some fiction projects.

What is the craziest thing you have ever done in your life?

Tough question. I'm fairly clumsy and risk-adverse, so I'm usually on the sidelines watching people do crazy things. That said, during my first full year of freelancing (2012), I spent seven weeks cycling with my uncle from Banff to the Mexican border. My uncle wanted an adventure for his 50th birthday and I had dreamed since high school about bike touring. I also figured I wouldn't get much work my first year, so was happy to use the time for adventure. We followed a mapped trail, mostly off-pavement, that crosses the Continental Divide 30 times. I rode all the way to the end.

Is there anything you would like to share about yourself that people would never, in a million years, guess?

I am a big anime fan, though I have never been into cosplay or comics. The secret to watching anime is to watch it in its original language. It is amazing how much culture and worldview are conveyed through language and how we speak, so dubbing, no matter how good, is always a mismatch and ruins the experience.

What other sorts of things do you like to do?

When I can, I like to visit friends who live on a boat-access-only property on Kootenay Lake, in BC. It is a chance to unplug, to spiritually refresh, to be in nature, and to do physical labour, as there is always something to be done around the property. It is the complete opposite of my sedentary life in the city, but somehow it still feels like home.

What is the most interesting index you have ever worked on?

Tough question. Earlier this year, one book I found both fascinating and horrifying was *The Bomb in the Wilderness: Photography and the Nuclear Era in Canada*, by John O'Brian (UBC Press, 2020). It was heavily illustrated with photographs, as befitting the subject, and it was sickening to learn what we have done with nuclear material. Not an easy book to read, but I'm really glad I had the opportunity.

Do you have any tips for indexing text that is hard to read because of the information you are taking in?

Be kind to yourself. It sounds clichéd, but it does make a difference. Acknowledge the impact on yourself and give yourself permission to feel the pain or outrage. Break the work into smaller chunks and take more breaks, or intersperse the project with another. We are not machines and do need to take care of ourselves, while as professionals we also have an obligation to get the work done. So try to be in tune with how you are doing and find a balance that will allow you to finish the work while also taking care of yourself. Also, sometimes the right decision is to turn down a project.

What index was the most fun to work on?

A couple of years ago I indexed a biography of Buffy Sainte-Marie. I was not familiar with her music, so as I indexed it was fun to find her songs on YouTube and connect with the book in that way.

Share a nightmare index experience, one where everything that could go wrong did.

I recently heard a quote on a podcast that (to paraphrase) the more you level up, the bigger the challenges become. I think that is true for indexing as well. I don't mean to imply that the challenges that newer indexers face are not real challenges—they are real and they are challenging because you haven't faced that experience yet. Just know that challenges don't disappear with experience; they just morph.

This year in the spring, I indexed every day for nine weeks, completing 15 projects (including one book I both proofread and indexed). The books ranged from a 56-indexable-page children's book to a 697-indexable-page commentary on the Bible's Book of Exodus. The bottom line is that I accepted too much work. It was a combination of being bored during lockdown and thinking I could fill the time with work, not wanting to say no to repeat clients, and wanting to see if subcontracting some of the work would help me handle a heavier load. And while I am very thankful for the subcontractors I used on a few of the projects, it was still too much.

Near the beginning, a couple of the projects took longer than expected and I had no buffer built into my schedule. I was then late for the next project, and it kept going like that for two months—working as fast as I could, rescheduling every project I could. It was extremely stressful and exhausting. I found I had to be very deliberate about rest so that I could keep going. I decided early on not to pull all-nighters, since I knew it takes me two to three days to recover, and that was time I could not afford to be unproductive. So I chose to be late so I would not fall

even further behind on the next project. I've heard a writer say that sometimes you just have to fall back on craft, and I think that is what I did—"don't think, just index," so to speak. Let the muscle memory take over.

What were your clients' reactions when you told them you needed to take more time with your indexes?

I found clients to be generally understanding, though I still felt guilty asking for more time, and it was still my fault for accepting too many projects. I think it also helped that I was not the only one running behind. I had one project cancelled (thankfully) because of the pandemic and a number of others arrived late, a couple by a few weeks. I think that allowed for more negotiating room, as we all understood that schedules were out of whack. It also made for a very fluid schedule, as I did not know when projects were going to arrive or when they would be due or what other projects they would be bumping up against. It was overwhelming trying to manage; while I kept a master list, day-to-day I tried to focus just on the project in front of me and not worry about the rest. Otherwise, panic was too close for comfort.

Do you have any thoughts about your indexing career that you would like to share?

I feel like I've come to indexing very differently from most people, in that many indexers start later in their life as a second or third career, while I've jumped in at the beginning of my career. I am still figuring out what I want my career to be, and I hope to have another 30-plus years of productive work. I do enjoy new challenges and I get bored easily if I am doing the same thing over and over again. On the one hand, indexing is great because there is always a new project. On the other hand, projects can sometimes blend into each other. So I am always on the lookout for something new. As I mentioned, I do want writing to be part of my career as well, and I am trying to shift more time and focus to that.

Do you have any thoughts that you would like to share about ISC/SCI?

Freelancing can be lonely and I really appreciate the collegial aspect of being part of the Society. I do look forward to seeing people at the annual conferences. As an introvert, being on the executive has proven to be an excellent way to get to know people; I don't think I would have gotten to know people as quickly without that reason to show up and engage.

You've been part of the executive committee and other committees for many years now. Why did you get involved at this level and what keeps you engaged?

Yes, I believe this is my sixth year. I was asked by Mary Newberry if I would take on the web administrator position. I don't know why Mary asked me; I'm not particularly savvy with technology, but I decided to say yes. Two years later I moved to being Prairies rep. It is the people who keep me engaged. It is a great way to get to know other indexers, and as a new indexer, also a good way to network and feel part of a community.

You were spearheaded ISC/SCI's first mentorship program in 2018. How did that come about?

The mentorship program came about because I was feeling in a bit of a rut. I felt that I was no longer a new indexer, in that I was getting regular, repeat work and was able to financially support myself. But I didn't know what new goals to set or what the next evolution of my business would look like. So I was really wanting mentorship for myself. I was on the executive and proposed the idea to a couple of people, who suggested that I take the lead on it.

Did you end up getting mentorship for yourself?

I haven't gotten formal mentorship for myself. I have gotten, at times, informal advice from more experienced indexers, which I greatly value and have tried to implement in my own work. I have a few clients who sometimes send me business books, some of which I find really insightful, and I also try to read business books and listen to podcasts outside of work as well, so I learn that way too. I've learned that I am very externally motivated, in that I am good at saying yes to other people and to the shiny new challenge. In such a client-centric business it certainly helps to be responsive to clients. The downside is that I am not very good at figuring out what I want and making time for furthering my goals. Sometimes the shiny new thing is really cool but doesn't actually help you in the long run. So I am trying to be more reflective right now and figure out what makes sense for me.

Do you have any suggestions or words of wisdom for other indexers out there, new and old?

Pay attention to changes and trends within the publishing industry. Many of us do not have a publishing background, and being a freelancer, it is easy to feel disconnected from the rest of the book production process. But we are a key element in book production, and changes in the industry will affect us as well. So get to know your clients as well as editors and others in the industry. Ask them

questions, read industry news, maybe attend non-index-ing conferences. If it helps, think of it as part of networking and finding potential clients; a couple of my clients were new publishers that I'd heard about and approached when they were first starting. And staying informed is also about not being blindsided by change that may affect your clients, and ultimately you.

Do you have any advice specifically for new indexers?

I really like the advice given to indie authors—that your best marketing tool is your next book. Similarly, for indexers I think your best marketing tool is your next index. Build a portfolio. Give clients a reason to hire you again. Keep trying to improve. If your work is solid and you are easy to work with, clients will notice and the word will get out.

The Challenges of Indexing Names

by Noeline Bridge

As I well know from having compiled a book on the subject,[1] indexing names is a huge topic, difficult to condense into a journal article. So I have confined myself to describing the categories that seem to plague indexers most—going by posts to the main indexing discussion lists and my own decades of indexing—and divided these categories broadly into when to index names and how to index them.

When to index names

To begin with an anecdote, my first two indexes were for individual academic authors who had diametrically opposed views regarding the indexing of names. The joint editors/authors of the first book wanted no names whatsoever indexed. Their rationale was that readers always consult the index first and decide to buy and/or read the book based on the presence of their name, so they decided to forestall this practice. By contrast, the author of the second book wanted all the names (outside of the bibliography) indexed, including those in the voluminous notes, however passing the mention. Her rationale was that she wanted to make sure credit was given not only to all her colleagues but also to her attributed students.

Of course I gratified both of the above wishes, arguing only (and successfully) for the inclusion of historic names in the discipline of the first book. Many books and many years later, I've never again confronted either scenario, all clients since having been content with the usual indexing conventions—even the above authors for repeat projects.

Names in family/local histories and histories of institutions

Working with small-scale histories often means indexing all the names—outside of the blatantly repetitive—no matter how tedious the long lists you encounter, including

Noeline Bridge, author of Indexing Names. *Photo provided.*

names in the captions of photographs. The readership is key here; readers will be looking for particular names and any information attached to them.

Cited authors

I have heard of indexers being asked to index cited authors when they appear in bibliographies or reference lists, but this has never happened to me. The nearest I have approached this was in the instance I mention above, when asked to index all names in the notes section, even when they referred only to bibliographical sources (I obliged, as one must). Otherwise, the challenges that arise can be divided into two categories, names within the text and names within the notes.

Names within the text are, in theory, relatively easy to decide. The authors whose work is discussed in the text are indexed, while those merely cited (usually in parentheses) aren't. However, I have found the matter to be not quite as simple as that. Complexity arises because sometimes—even often in some books (including one I am indexing at present)—those cited names, whether outside or within

parentheses, can be more a matter of the author's style than textual substance. The names of authors whose ideas are frequently quoted and/or discussed within a book may sometimes be included in parentheses following what amounts to a discussion of their work or a quotation from the same. In other words, their names could just as well have appeared outside the parentheses, connected grammatically with the foregoing discussion.

A new name in a note, accompanied by some discussion of that person's ideas or work, is obviously to be indexed. A challenge arises when a name already mentioned in the text is also the subject (or part of the subject) of the related note. Is this additional mention in the note of enough substance to be indexed also? The most useful way of looking at this is to think of the names in the same way as a subject mentioned both in the text and in the relevant note. Does the information in the note add anything at all to the information in the text?

How to index names

As I'm fond of saying, most of the time indexing names doesn't pose a problem. The elements of the name—usually given and family name or surname—are presented in the text and the order for entry in the index is easy to determine. However, the more complex ones can consume a maddening amount of precious time. It's impossible in an article to address all the challenges posed by the ordering of names, so I have chosen those that came to mind readily, ones that face me in most of my own work.

First, a note on the sources available for resolving problems. With the advent and development of the Web, researching names has become much more convenient, so much being available from our own computers instead of having to use reference books in libraries. In my book, *Indexing Names*, I include a chapter on resources, both print and online, with the advantages and limiting factors of many of them, so I refer you to that. (I must add that I have never received nor will ever benefit from any royalties from sales of the book.) And more resources have, of course, been added since in the indexing journals.

I must note here that over the years Wikipedia has developed useful articles on many aspects of names, nationalities, and ethnic and religious groups, as well as topics related to multinational naming conventions. I have found them comprehensive and reliable enough for most indexing purposes, and I often resort to them in my own work. Below I refer to several of the more general articles. Otherwise, evaluate online reference sources as you would traditional print sources such as biographical dictionaries and encyclopedias. Just as in the past reference books of dubious authority, with uneven and biased coverage, were published, today there are decidedly unreliable websites.

Compound surnames

As an indexer of primarily academic works, I find compound surnames to be a frequent challenge, particularly with regard to women academic writers. The text is often helpful in providing the preferred surname of the writer, but this is not always the case. Sometimes a person is mentioned only once in the text, without a citation in the notes or bibliography for guidance. More infrequently (but often enough to be a nuisance), the order of the surnames in the text and in the notes/bibliography can be inconsistent. My favourite source for resolution is the academic's listing on her university's website, which likely uses the writer's chosen form of her name. Library of Congress Authorities is another reliable source, of course, but I find that the university listing is usually faster and easier to access.

Women's names tend to be complicated by the fact that many will take on their spouse's family name and add to their own. When these latter names are hyphenated, the order is easy. However, often they are not, and the bearer's choice of dominant family name tends to vary. For example, here are some recent US names in the news that illustrate the differences, along with some former but recurring (in my indexing) ones:

Ruth Bader Ginsburg — Bader Ginsburg, Ruth
Amy Coney Barrett — Barrett, Amy Coney
Keisha Lance Bottoms — Bottoms, Keisha Lance
Hillary Rodham Clinton — Clinton, Hillary Rodham (or just Clinton, Hillary, depending on context)
Harriet Beecher Stowe — Stowe, Harriet Beecher
Elizabeth Cady Stanton — Stanton, Elizabeth Cady
Lady Mary Wortley Montagu — Montagu, Lady Mary

With the possible exception of Hillary Clinton, these women are often referred to by their compound surnames, although they actually used only the last surname element.

It's a similar issue with some famous men's names I've frequently encountered, such as John Foster Dulles, Henry Cabot Lodge, and William Lyon Mackenzie King. These gentlemen are often referred to by either one or two of the names following their given ones. John Foster Dulles: is his last name the compound Foster Dulles or just Dulles? It is Dulles, although I have encountered both Dulles and Foster Dulles in the same text. Similarly with Henry Cabot Lodge—the family name is Lodge—and, frequently, William Lyon Mackenzie King, whose surname was simply

King (although once Lyon Mackenzie King, just to complicate my and the reader's lives).

As most indexers are aware, European names often feature compound surnames, which need to be indexed according to the conventions of the country:

Maurice Couve de Murville (French politician) — Couve de Murville, Maurice
Francisco Goya y Lucientes (Spanish artist) — Goya, Francisco, is likely all you need
Andrés Manual López Obrador (president of Mexico) — López Obrador, Andrés Manuel
Marcelo Rebelo de Sousa (president of Portugal) — Rebelo de Sousa, Marcelo
Samuel de Champlain (explorer) — Champlain, Samuel de

The last example takes us into the complex realm of names that include articles, prepositions, and combinations of those (partitive articles, or particles), which are too detailed to go into here. The comforting aspect is that there are lots of resources available. I recommend that indexers who frequently encounter such names make themselves aware of these parts of speech in the language concerned. It's always useful to know where to find a list of articles in commonly used languages—also important for indexing titles of works, where knowledge of the article is crucial. Wouldn't you know it? Wikipedia has a list. Although it isn't as comprehensive as it could be, it does include the major languages.

Compound first names

Compound forenames usually pose no problems, being obviously first names and the order obvious. But I have indexed East Asian names that included Western as well as Chinese or other vernacular names. A couple of years ago a project presented these examples:

Connie Chan Po-chu
Eric Kit-wai Ma
Josephine Siao Fong-fong

I could immediately discern that the hyphenated names were the bearers' Chinese given names, and the Western names were obvious, but how should I order them? Eric Kit-wai Ma also appeared in the bibliography, so I copied the form used there: Ma, Eric Kit-wai.

Seduced by the different presentation of their names in the text—the Chinese given name immediately following the family name instead of the Western given name—I indexed the two women (both actors) as Chan Po-chu,

Connie and Siao Fong-fong, Josephine. Looking at these entries now, I'm puzzled that I didn't follow the practice for Ma, even though the text itself presented the order differently for the actors versus the scholar. The following now looks a lot more logical to me:

Chan, Connie Po-chu
Siao, Josephine Fong-fong

Further kicking myself, I realize I should have consulted Fiona Swee-Lin Price's Success with Asian Names, which sits on a bookshelf right next to my desk. On its copyright page, the Library of Congress Cataloging in Publication data renders her name as Price, Fiona Swee-Lin, which makes perfect sense to me.

Names with titles or honorifics

The central requirement in the complex topic of titles and honorifics is recognizing their presence. Good ol' Wikipedia provides some lists, instanced below.

Religious names

As with all titles, key is the indexer's awareness that there is one in the name, and which word it is. To this end Wikipedia helps by providing a comprehensive international "List of Religious Titles and Styles." All the major and many smaller, even ancient, religions are included.

Titles should follow the person's name. But the question is often whether the title should even be included. Is the person's name enough in itself? That depends, as with so much in indexing, on the style of the book—the author's style and publisher's guidelines (if any)—and the readership. In the absence of publisher's guidelines, does the author routinely cite the titles? Would readers expect to see them, even take offence if the titles were omitted? To illustrate, I have been indexing a series of Roman Catholic books over several years; for them I include all titles associated with the names (and the fullest forms of those names), which is the style of the text and has been emphasized by the editor.

Royalty and nobility

Some recent examples from my work include the names of monarchs of eSwatini (formerly Swaziland):

Mswati III, king
Gwamile Mdluli. See Labotsibeni (Gwamile Mdluli), queen regent
Mbandzeni, king

Was it strictly necessary to include the titles in my index? Not really, but I do usually include them; for one thing, they were in the text, but their inclusion also made it abundantly clear who was being referred to. The names of these monarchs usually consist of only one word, and in an index that also included a number of one-word place names, this distinguished the people from the place names, which I considered useful for user clarity.

Offensive though it may be to our egalitarianism, a pecking order exists within many national groups (I would say all, but that may be overgeneralizing), and such orders are complex to navigate. The conventions governing these titles are too many and too complicated to begin to unravel here, so I can only suggest that indexers make themselves aware of the various sources of assistance. Of prime importance is being aware that a title is present and knowing which word(s) in what can be a long string of names comprises the title. For both royalty and nobility, the indefatigable Wikipedia provides yet another useful international listing, "Imperial, Royal, and Noble Ranks."

Note that you can be fooled: titles such as Duke, Earl, and even Baron and Marquis can also be given names. Think, for example, of film director and actor Sacha Baron Cohen, and there was an American journalist called Marquis Childs.

The position of the title can also be complex. With British nobility, for example, whether the title is placed directly before the given name or follows them all has significance regarding the status of the person. This may not matter in an individual index, but again, that depends on the particular style of the book and its genre and readership. For example (and strictly speaking), "Princess Diana" for the late Diana, Princess of Wales never was correct according to British conventions; it was more by way of a nickname. An indexer should be guided by author usage rather than risk author wrath by making the wrong decision.

As with other titles, is their inclusion always necessary? Not at all, but again it depends on the style, genre, and readership of a given text. I usually include them in the index if they are in the text, and in the same detail. I have indexed books where the simplest of designations were sufficient, but I have also encountered a couple of authors who wanted all the names (given names and surnames) and titles included. One of these books concerned German landowners in the early 1900s, leading to some lengthy strings of names and titles, and all in the order correct for the time.

Alternative names

Some people use more than one name either simultaneously or at different stages in their lives or careers. These names are sometimes used as if they belong to separate people. Examples include writers such as Ruth Rendell, who also published as Barbara Vine; James Morris, who later became Jan Morris and published books under both names; and John Dickson Carr, who wrote under that name as well as several other pseudonyms.

Unlike changes of name, as with James/Jan Morris, that are sequential, Rendell/Vine and Carr/other pseudonyms published their books simultaneously. With changes of name, indexers generally select the most recent name by which the person is known. However, with people whose accomplishments are attached to names that look as if they could belong to separate people, readers would be inclined to think of them that way—of Ruth Rendell for these books and Barbara Vine for those other—prompting separate entries for each, linked by see also references.

Similarly, a book I indexed on professional wrestlers contained many chosen alternative names. Wrestlers seemingly adopt various pseudonyms only to change them later to something else, but they are known for their fights under each name—again as if the names belonged to separate people. I chose to index them under each pseudonym, according to the context, also connecting them with see also references. This resulted in such enigmatic glories as these:

Giant Haystacks. See also Loch Ness Monster
Powers of Pain. See also Barbarian; Warlord, The

As always, much depends on the context. Regarding changes of name, it is customary to index the latest form of a person's name, with see references from the earlier forms. However, exceptions can be envisaged. What if the emphasis of a book is on Jacqueline Kennedy rather than Jacqueline Onassis, the latter being more of a coda in the text than a substantial part? Also, family histories may call for another treatment, so that the family name is predominant.

Another area of alternative names concerns the aristocracy, where indexers can be faced with both family names and titles. Two factors come into play here: First, which is predominant in the text, the family name or the title? Second, aristocrats have often had prominent careers in public life, for example, the Russells (Dukes of Bedford) and the Cecils (Marquesses of Salisbury). Is the emphasis of the book on the person(s) in public life and the name they used there, or on the private, family aspect—and, if so, on the title or the family name?

Distinguishing between similar names

For the following pair of eSwatini writers, I considered their names distinctive enough not to not add more detail:

Dlamini, Gcinpahi
dlamini, g.d.

But others cry out for a distinction to be made, based on what evidence is provided in the text:

Puyi (Manchukuo emperor)
Puyi (Qing emperor)

A volume of correspondence regarding a rural part of 19th-century Europe yielded many similar family names, often with only scant clues about their identity:
Goerzen (of Gnadenheim)
Goerzen, Abram (of Lichtfelde)
Goerzen, Peter (of Alexanderwohl)
Regier, J. (of Schoensee)
Regier, Johann

Strictly speaking, I didn't need to distinguish quite so much, but I wanted to make it clear that neither Abram nor Peter Goerzen was the Goerzen of Gnadenheim, and that J. Regier was obviously not Johann Regier.

One-word names

One-word names are common in some parts of the world—Burma and Java, for example—and also historically, before surnames were adopted, a process that took centuries to evolve (see below). Glosses, or qualifiers, aren't needed when the names are well-known (Plato, Homer, Rumi, Sukarno) or are distinctive pseudonyms (Molière, Banksy, Eminem). All is well with such famous people unless others in the text bear the same name, in which case glosses are indicated. In a book on Islam where the prophet Muhammad is featured, there could well be other Muhammads, for example, or, as I have also encountered, more than one Ali (besides the fourth Imam).

With instances of other, ordinary names, whether there are any others in the index with the same name or not, I usually add information to clarify that the entry really is a person's name, and for user information. Here is a rather motley collection from my indexing:

Li, Mr. (cameraman) [as characterized in the text]
Smith, Miss (teacher)
Joe (gardener)

Mary (Carr family washerwoman) [as characterized in the text]
Caroline (midwife)
Graf (book dealer)
Cornelius (child) [described briefly in the text as living with the letter-writer's family, with no other details given]

In general, regarding glosses, I usually add them. As I proceed through the book compiling the index, I add glosses for my own information when confronted with common or similar names, so why not leave them in for the reader's use? Besides, I once learned a humiliating lesson from an autobiography I indexed. I had added glosses to all the family names as I went along, then removed all except the ones needed for disambiguation—family members with the same names. The author promptly questioned why the inconsistency, and I realized that to a non-indexer this treatment, considered normal by indexers, may well look like sloppiness. Ever since, I have reverted to my previous practice, which has been to retain almost all the glosses, removing only those that are obviously superfluous.

Names without surnames

Some examples of names without surnames occur in the "one-word names" category, of course. Surnames, or family names, were not common in the past, still do not exist among some ethnic groups, or were adopted by others only recently. Particularly when indexing medieval and even Renaissance names or non-Western names, the indexer should be sensitive to the possibility that none of the set of words constituting a name is a family name or surname. Words accompanying the given name can be a place name—with Leonardo da Vinci, for example, Vinci is the name of a town, not a surname—or a descriptive phrase such as in Eric the Red. Names without surnames should be indexed in direct order.

A category of names without surnames is patronymics. Many names from centuries ago consist of one or two given names followed by a patronymic—a phrase indicating the father (or, more rarely, the mother, a matronymic). Today many surnames incorporate patronymics, for example, names ending in -son or -sen or beginning Fitz- or Mac-. Over the centuries what were originally patronymic phrases often morphed into family names.

However, some nationalities still use patronymics as such, not as surnames. In the West we have Icelandic names, and there has also been a movement in Wales over the past couple of decades to revive the use of patronymics. In non-Western parts of the world, the ones

I've encountered most have been Middle Eastern names, both Arab and Hebrew, that involve elements such as bin and ben. There is also a naming tradition among Acadians where individuals can be known by their immediate levels of ancestry, as in Gérard à Johnny à Adelin.

Yet again Wikipedia doesn't let us down, supplying an explanation and international listing titled simply "Patronymic." Patronymic/matronymic names are indexed in direct order, effectively forming a phrase—which leads me to my last category.

Names as phrases

In a sense, all names without surnames form names as phrases. But there is a quirkier category, names that may contain no recognizable fore- or surname. They may be chosen by the bearer (Judge Judy, Lady Gaga, Le Corbusier, Dr. Seuss, wrestlers' pseudonyms) or assigned by others (Master of the Bigallo Crucifix, P'tit Jean). Many fictional names fall into this category; Donald Duck and Mickey Mouse are obvious examples. The pseudonym Mark Twain is actually a phrase, a Mississippi riverboat command. However, because "Mark Twain" closely resembles a real name and is commonly treated as such, he would be indexed as Twain, Mark.

The problem with most names in this category is the usual one: whether to index in direct order or to invert.

The Anglo-American Cataloging Rules (AACR2) dispenses advice for library cataloguing, dividing phrase names into particular categories that I have explicated and applied to indexing in an article in *The Indexer*.[2] Basically the categories boil down to whether or not the name contains a recognizable fore- or surname (or both), begins with a title/honorific (Dr. Seuss) or another word (Calamity Jane, P'tit Jean), or consists of a forename followed by a designation (as in patronymic names above).

Some (if not many) indexers see a bigger distinction between fictional and real names than I do. At the outset I tend to look at both as personal names calling for similar treatment (usually inversion). Other indexers recommend more of a distinction, such as Madeleine Davis in her Indexer article on fictional names, to which I also draw your attention for phrase names.[3]

Notes

1. Noeline Bridge, ed., Indexing Names (Wheat Ridge, CO: American Society of Indexers, 2012)

2. Noeline Bridge, "Personal Names as Phrase," The Indexer 29, no. 4 (2011): C1–C4.

3. Madeleine Davis, "Fictional Characters in Non-fiction Works," The Indexer 24, no. 2 (2011): 65–69.

Indexing Art Catalogues, Central Canada's Deep Dive into

by Ronnie Seagren

For October's Central Region meeting we had planned on doing some practice indexing. When the call went out asking if anyone had something to index, Enid Zafran shared a chapter of a current project, an art exhibition catalogue called *Cubism in Color: The Still Lifes of Juan Gris*. Some of us were able to read the chapter ahead of time, which enriched the experience.

Enid walked us through the learning she's distilled from years of indexing such catalogues. These very specific gleanings can help you develop or refine your own approach to similar content. While Enid talked, Ronnie displayed the elements of the book, the chapter, and the growing index on Zoom. When Enid finished the index, she shared it with us to show the results of her decisions. This article covers some of the specifics of this indexing niche.

Format

More than in many genres, the publisher often restricts the index to a given length, such as 500 lines, because of the high cost of fine colour printing. The resulting index often has to be run in to save space. However, Enid has found it helpful for the reader to indent the most important entries about the artist. She does this by exporting both the run-in and indented formats from CINDEX and then copying the relevant indented entries into the run-in RTF file.

Page numbers and ranges

Enid uses what she calls "liberal ranging." If a term is used significantly on four consecutive pages, even though it's not continuous, she will still call it a range. That's helpful
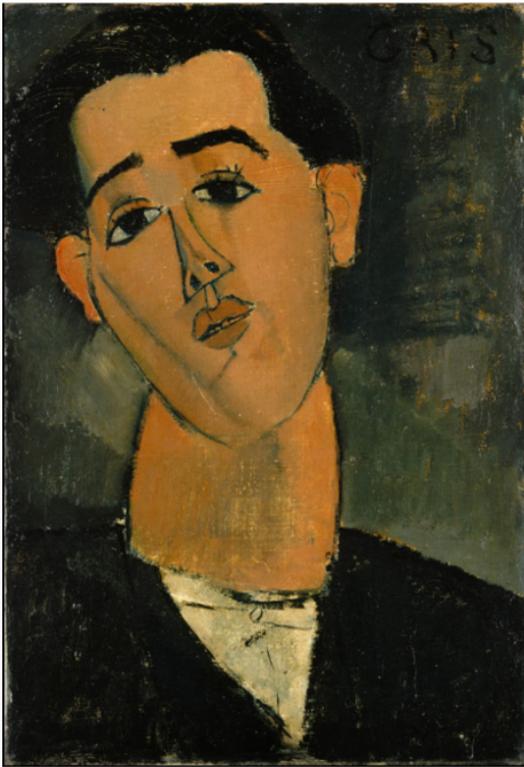
Modigliani's portrait of Juan Gris, 1915. Wikimedia Commons.

for the user and saves space in the index.

If the author discusses a figure on the same page, be sure to list them both—65, 65f. In an art book it's not always clear which page number to cite. If the figure is on one page and the caption is on the facing page, use the page with the image. If you have a foldout or unnumbered pages, you might have to say "following 167." Set a consistent convention, such as italics for the figure and bold for the catalogue listing (or vice versa), and explain it in the headnote.

Artist and works

Enid's approach is to index biographical information under the artist's name and use a separate entry for the artist's works, to make them easy to find. If the artist works in different media or modes, these would be separate arrays:

Kipling, Rudyard, artwork by
Kipling, Rudyard, writings by

If other artists and possibly their works are discussed in detail, they can be treated the same way, but most will just have main entries. One way to organize a secondary artist for whom multiple works are named is to make a sub-level "works by" under that artist's name and list the titles as sub-subentries under that phrase. That approach separates the titles from the subject entries and helps users find them. Enid explained that in CINDEX she uses

"{zz}works by" to facilitate separation of the final grouping in that array.

Unique to this kind of book, each work in the exhibit has a catalogue number or figure number that needs to be indexed with the name of the work:

Gris, Juan
Gris, Juan, works by
    Still Life: Table with Red Cloth (cat. 41), 167
    The Violin (cat. 26), 42, 145
    Violin (cat. 8), 120
Kipling, Rudyard, artwork by
Kipling, Rudyard, writings by

Exhibition venues

Because of the length restrictions, Enid made stand-alone entries for galleries or museums but decided not to double-post them under "Exhibitions." In another index she might have included exhibition titles, with their years, under the specific gallery or museum names. Since galleries frequently change their names, she asks the publisher what convention to use; one publisher might want the current name only but another might want a "formerly" gloss with the old name. Of course, you would use the usual approach for passing mentions. Again to save space, don't necessarily pick up where a critic published an article mentioned in the text, unless it's important.

A current trend seems to be for some publishers to want galleries organized by location, which is useful for travellers but not for people who don't know where the gallery is. If you don't do that, you might want to include a gloss for the gallery's location, such as "Leicester Galleries

La table du musicien, Juan Gris, 1926. Wikimedia Commons.

(London)" if readers are unlikely to know.

London
    British Museum, 12, 24, 53, 115, 129
    Hyde Park, 259
    Leicester Galleries, 197
    P. & D. Colnaghi gallery, 32
    Royal Academy, 28, 125, 161, 179
    Royal Academy Schools, 159
    Tonina Dorati collection, 96

Glosses

Space considerations rule. You have to decide which glosses add the most information for the user and optimize the allotted space in the final index. Do you want to add the year after each work? Is knowing when each work was created fundamental to the story or understanding the artist's oeuvre? For a retrospective at a gallery, it might be important to include the date.

Sometimes you face real conundrums. If two or more works have exactly the same title, how can you distinguish between them? What if they were done in the same year? Once Enid indexed a book with a long list of Lee Krasner's untitled paintings from the same year, and she found she had to resort to including the sizes for each one specifically!

Untitled (1948–49, Oil on canvas, 24 × 30 in.), 40
Untitled (1948–49, Oil on canvas, 42-1/8 × 21-1/8 in.), 44
Untitled (1949, Oil on canvas, 20 × 16 in), 46
Untitled (1949, Oil on canvas, 38 × 30 in.), 58
Untitled (1949, Oil on canvas, 38 × 33-1/8 in.), 69
Untitled (1949, Oil on composition board, 48 × 37 in.), 52

If a figure shows a detail of a painting, you don't have to add a gloss for the detail. You can add the page number that shows the detail to the main entry for the work in question.

Another common issue occurs when works are attributed to an artist or are modelled on an earlier piece.

Cook, Thomas, 65; Sleeping Congregation (after Hogarth), 66, 67f
Cruikshank, George: The Celebrated Reverend T. Screech (attributed to Cruikshank), 71, 72f
Caravaggio, Painting (School of), 257

You can also use the abbreviation attrib. and explain it in your headnote.

Sub-entries

Be consistent in how you phrase sub-entries. Some of Enid's favourites are:
- compared to
- reception of
- criticism of / critical reaction to
- childhood of / early years of
- travel to _____ (place name with year or decade)
- [name of artist or collector] and

Cross-references

One way to save space is by using See or See also references. Here's how Enid handled it in this index:

Exhibitions, 56–59. See also specific name of gallery or museum

Museums. See American private collectors and museums; exhibitions; Spanish collections; specific name of museum

La fenêtre ouverte, Juan Gris, 1921. Wikimedia Commons.

Workflow

Enid likes to do a first pass to put in all the artists' names, catalogue entries, and illustrations. The catalogue numbers can help you identify certain references later. She asks herself if a "vetting" approach will help make sure she captures all the main subjects and page ranges. Then she goes through each chapter for sub-entries and any other concepts or indexable content.

Final checks

Illustrations are nearly always referred to in the text, so make sure you catch those entries. In CINDEX you can do compress + consolidate references and then do a pattern find for a page field that has f but no comma. Check the

text to see why you didn't add a locator for discussion of the illustration. Also, make sure any schools of art or themes are indexed.

Check the index statistics to see how many lines you have and whether you need to make adjustments such as removing sub-level detail if necessary because of space limitations.

Since I am very interested in art, I guess all I have to do now is find another project like this. I can't wait to put Enid's excellent tips to work!

Want to Know What MACREX Can Do for Your Business?

by Gale Rhoades

MACREX, since 1982 the worldwide choice for indexing professionals, provides comprehensive, flexible support for indexing, with extensive time-saving features and absolute control of the final index. It does not, however, use the standard Windows interface. Most indexers use only a small portion of its power and flexibility—the subset of commands and functions dictated by the current project. Many new users find MACREX overwhelming, but a brief tutorial usually sets them on the path of a favourable experience and fast completion of projects.

I have always believed that every computer user should use the software they are comfortable with, providing the software is appropriate to their needs. For example, you would not use a spreadsheet program for writing letters, nor would you use word-processing software for accounting. But to select the best software, experience with using a variety of similar programs is extremely important.

The University of Berkeley extension program X477 offers fabulous indexer training (note that I am the support system for the students and instructors). This program introduces the students to the many aspects of the indexing profession. One requirement is that each student use CINDEX, MACREX, and SKY for two or three simple projects, the goal being to introduce them to their software options. Unfortunately, it has been my observation over the past ten-plus years that many students dislike this requirement. They are sure they know—based on what friends use or a comment overheard—which software they will purchase. Why should they waste their time using the other programs?

First, some background. Indexers (and all other freelancers) should track their time spent on each project.[1] In general, the invoice total, divided by the time spent writing and transmitting the index, indicates your hourly earnings. Thus, if you spend five hours on a project and are paid $100, your gross earnings are $20 per hour. When

Gale Rhoades. Photo provided.

you deduct the 45 to 55 percent most accountants advise (to cover the costs of memberships, supplies, continuing education, advertising, taxes, insurance, sick and vacation allowances, etc.), your actual earnings are about $10 per hour. The same project completed in 2.5 hours will double your earnings.

Charging for a project on a per page or per entry basis provides you with a way to increase your hourly pay. Charging by the hour rarely allows for self-employment expenses (remember the 50 percent or so for overhead costs). Thus you have two choices if you want to double your earnings. One would be to double your per-piece rate, which few publishers and authors would be willing to pay. The other would be to invoice for double (or more) the number of hours it actually took to finish the job.

Another consideration is the type of material you are indexing. Most trade books, especially if you have subject

knowledge, take less time to index than scholarly works. Indexing journals is often much slower than back-of-the-book indexes. Embedded indexes require more knowledge and time than a database project. Many indexers track not only the hours spent on each project but also the type of project and client. Over time you will see that some projects are much more profitable than others. This information should guide your marketing efforts.

Now we can look at ways to improve your calculated hourly earnings. First and foremost, know your software! For example, there are many functions in MACREX that require only a single key combination. The more you keep your fingers on the home row and avoid the mouse and out-of-reach keys (e.g., the function keys on many keyboards), the faster you will type. If you are a slow typist, consider a program such as Mavis Beacon Teaches Typing. There are many such programs, including some that are free or that turn practices into interesting games. Go to Best Buy or a similar store where a variety of keyboards are on display. Put your fingers on the home row. Can you easily reach all the needed keys?

For some indexers, using Dragon Naturally Speaking eliminates the need for most typing. The drawback is that you need to train Dragon continually. I advise defining several voices—one for when you are refreshed and relaxed, one for when you have a cold, one for those times when you are stressed, etc.

Back to the original topic. Why should you spend time using indexing software before making your choice? Indexing software will be one of your largest expenses when setting up your business. The software and your keyboard, working together, play a large role in how long it takes to write an index. Yes, I agree that the computer, subject knowledge, experience, and other factors all play a role in getting the index completed, but your software and keyboard choices outweigh all other factors.

As you gain experience with the art of indexing and with your software, you should be developing what I call "finger memory." With most keyboards, it's easier to keep your fingers on the home row if you can avoid using function keys. The Control key and the Alt key, plus a letter or digit, especially when used together or with Shift, provide sufficient options for all the functions needed to write the index. Because some users prefer them, MACREX supports using a mouse or touchpad and the function keys. However, your hands need to leave (and return to) the home row, and your eyes have to find the correct spot on the manuscript page.

MACREX is not a "pretty" software. It looks like an old MS-DOS or CP/M program, as you can see below:

I remember when I first saw the MACREX Main Menu on my Osborne 1, in the fall of 1983. It was not much different from what you see above, though MACREX version 9 displays a lot more information in the Main Menu than there was in 1983. Absolutely not a pretty menu!

But MACREX does not have to be pretty; it has to help you finish the index quickly and to the client's specifications. The most frequent operations start when you press a single key. If you have more than one client, client-specific folders ensure that all the option settings are the same for each index created for that client. Start a new index, then press E when you reach the Main Menu. You are ready to start writing entries.

Want to swap a main heading and its subheading? Press Ctrl-Z. The entry is complete; press Enter to save it, and you are ready to write the next entry. Want to make an RTF (Rich Text Format) file? Press Ctrl-Q until you are back at the Main Menu, then press F and wait a moment for your word processor to display the fully formatted index.

I could go on for many pages identifying frequently used key combinations. What matters is that by the time your first index is half completed, your fingers will know the basic commands needed for you to write an index. Furthermore, because you rarely need to look at the screen (your eyes are on the manuscript), you won't notice the old-fashioned layout.

Incidentally, MACREX documentation includes two PDF documents on key combinations and shortcuts, one organized alphabetically by key combination, the other organized by task.

When using specialized software, technical support is essential. Most MACREX users rave about the availability of support, even though many issues have little to do with the software itself. Support by phone and email (normally 24/7/365) is augmented by twice-a-week Chet Chats and a MACREX indexers group on MeWe.com (see below).

Bottom line, consider giving MACREX a longer look. If it's not for you, most of the suggestions above—especially about learning to use your software fully—will improve your financial situation.

Chet Chats: Special offer for ISC/SCI members

As of 1 December 2020, membership in MACREX Chet Chats is being offered to ISC/SCI members at no cost until 31 December 2021. After that, you determine the cost of membership based on its value to you (if you're still working to establish your business, take another year at no cost).

The Chet Chats cover many topics:
- indexing procedures

- indexing software (usually but not always related to MACREX)
- Windows (including Windows running under Parallels)
- system maintenance (backing up, malware, best software tools, etc.)
- Microsoft Office, especially Word and Excel
- dealing with security concerns (e.g., why Firefox and Brave are currently the safest browsers; why use DuckDuckGo as your search engine; why I no longer recommend CCleaner—and much more)
- computer literacy, especially vocabulary

These chats often stand in for the office watercooler or snack room. Sometimes, especially when members need a mental break from their daily routine or to gather their thoughts about a complex indexing project, we talk about the weather or what's going on in our lives.

The current schedule for Chet Chats is Tuesday mornings at 10:30 a.m. and Friday afternoons at 1:30 p.m (both Pacific time). Normally a reminder is emailed in advance of each chat. At a minimum, the reminder identifies local time zones for members and provides an alternative link for joining the chat and a list of possible discussion topics.

Details are part of the reminder when information needs to be included; perhaps there's an issue with the current MS update or updates to commonly used programs. Possible format changes (day, time, medium) always appear first in a reminder. Background for a discussion topic also may be included.

Attendance always comes second to "life" and work. Some members attend virtually every session, while others take part once a month or so. Some attendees "listen" while they work on a project (right now there is no video or audio—the chats are carried out with keyboard and screen).

Existing members include founding members (e.g., Do Mi Stauber, Sheila Ryan, Victoria Baker, Thérèse Shere), X477 students and graduates (some from the first class offered), and other indexers. At least two winners of the ASI indexing awards attend regularly (https://www.asindexing.org/about/awards/asi-indexing-award/recipients-of-asi-indexing-awards). An additional advantage of belonging to Chet Chat is the "Indexers Available" list, which members normally use to subcontract or refer projects.

I set up the MACREX indexers group on MeWe.com largely because I hate the volume of advertising on Facebook. MeWe does not accept advertising; rather, it offers premium options. Some Chet Chat members and other MeWe.com users have joined the group. If you are interested, the link is https://mewe.com/join/macrexindexers. I plan to post the Chet Chat reminders and similar

material to that group as well. Perhaps MeWe and the MACREX indexers group can become useful to all of us.

Recent phone and email requests for assistance have reminded me how easy it is to establish routines for meeting client specifications. But when you get a new client or an existing client changes their design, panic is often the result. Or perhaps your software is upgraded and the changes complicate locating a rarely used command or function.

For 10 years Chet Chats have combined troubleshooting with the inevitable question "How do I get faster?" We all know there is no one right way to use your software. Expanding your knowledge of computers, operating systems, software, and indexing processes will also improve your bottom line by increasing your pay for each hour worked.

Bonus: Gale's rules

1. There are no dumb questions!

2. The only time a backup is needed is when you do not have a current valid one.

3. If you can't solve a problem in five minutes, seek assistance.

4. Try before you buy.

Note

1 Send an email to macrexna@gmail.com if you would like to receive example tracking spreadsheets or a free demo of MACREX version 9.

Gale Rhoades, in addition to being the North American publisher of MACREX indexing software, is a consultant who specializes in making the use of computers more like toasting bread than rocket science. She developed many of her skills and techniques over the past nearly 40 years and is well-known as a teacher who manages to stay just one step ahead of the students. Since 1991 she has been a freelance IT professional working with individuals, small businesses, and municipalities; her client base now extends worldwide. Indexers often benefit from her freely shared knowledge of PCs.

Macrex Support Office, North America (macrexna@gmail.com)

Crossword Solution
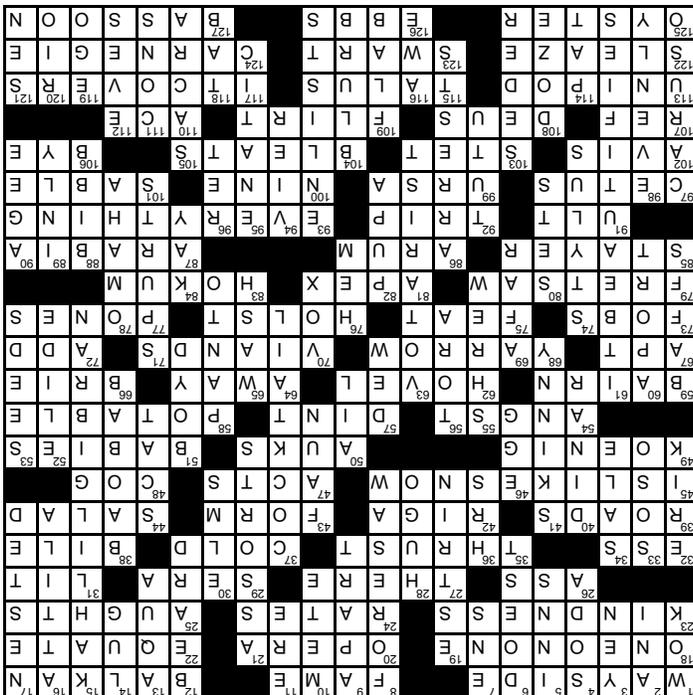
Winter Blanket: Solution
by Heather Ebbs

Membership

ISC/SCI MEMBERSHIP REPORT, DECEMBER 4, 2020

by Julia White, Membership Secretary

As of December 4, 2020, we have 116 memberships. Since the previous report, seven new members have joined.

Within Canada	99
British Columbia	22
Alberta	12
Saskatchewan	2
Manitoba	1
Ontario	47
Québec	9
New Brunswick	1
Nova Scotia	3
Prince Edward Island	1
Newfoundland & Labrador	1

Outside Canada	17
Australia	1
South Africa	1
United States	15

Membership Types

Individual	108
Basic	36
Listed	65
Student	4
Emeritus	3
Institutional	**8**
Alberta	1
Saskatchewan	1
Ontario	3
United States	3

Winter Blanket
by Heather Ebbs

Across

1. Path's edge
8. Renown
12. Peninsula of southeast Europe
18. Private
20. Wagner work
22. Make comparable
23. START OF QUOTE
24. Room prices
25. Anythings
26. Biblical beast
27. "Ta-da!"
29. Blood fluids
31. Burning
32. Double curve
35. Use épée
37. Chilly
38. Ill humour
39. Paths
42. Latvia's capital
43. Shape
44. Leaves for lunch?
45. PART TWO OF QUOTE
47. Exploits
48. Tooth
49. He played Chekov
50. Seabirds
51. Wee ones
54. Dread
57. Power
58. Drinkable
59. Wee one
62. Hut
64. "Shoo!"
66. Soft cheese
67. Likely
68. Flowering perennial
70. Provisions
72. Do sums
73. Watch chains
75. Exploit
76. *The Planets* composer
77. Cornbread cakes
79. Cutting tool
81. Pinnacle
83. Nonsense
85. One who ignores "Shoo!"
86. Jack-in-the-pulpit, e.g.
87. Peninsula of southwestern Asia
91. Final: Abbr.
92. Stumble
93. PART FOUR OF QUOTE
97. Sea-monster constellation
99. ___ Major (constellation)
100. Diamond complement
101. Fine fur
102. They try harder
103. Editor's mark
104. Cries like a goat
106. "So long!"
107. Ump.
108. ___ *ex machina*
109. Bat an eye?
110. Expert
113. One-legged
115. Anklebone
117. END OF QUOTE
122. One of low character
123. Dark in colour
124. Library philanthropist
125. Mollusk
126. Subsides
127. Wind instrument
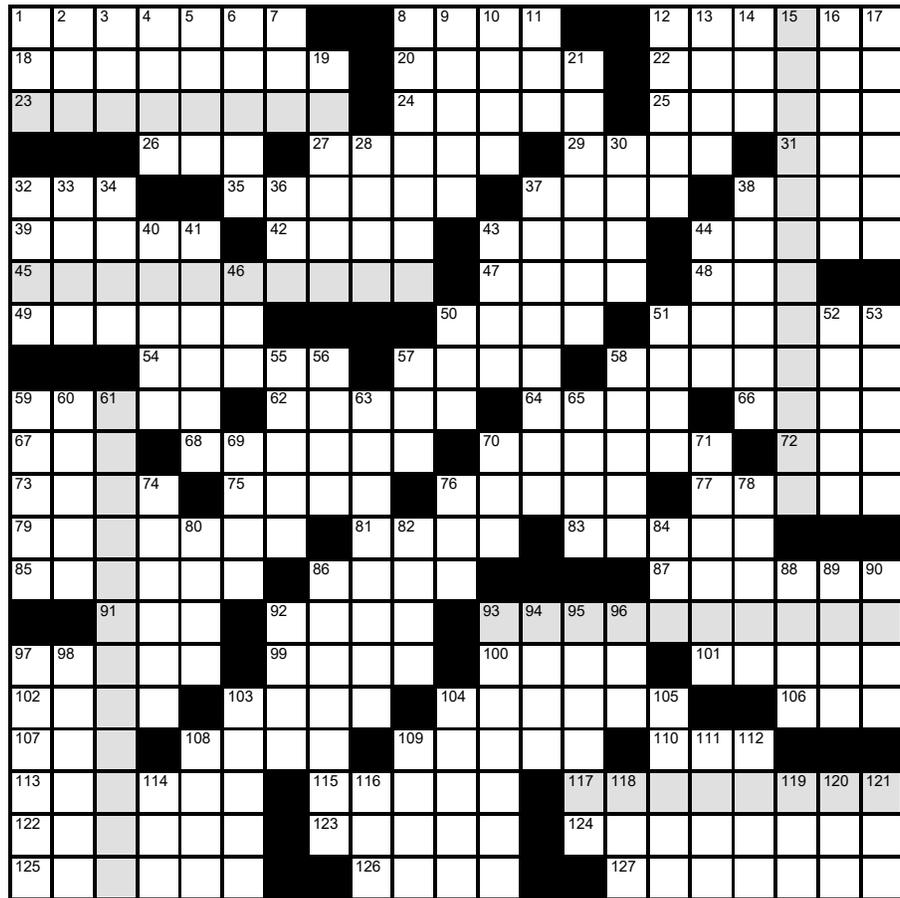
Down

1. Moo goo gai pan pan
2. Cuckoo bird
3. Hankering
4. Pop
5. Places with rooms
6. "When thou ___ alms ..."
7. Dashes
8. Anticipated
9. Separately
10. Dole (out)
11. "... ___ he drove out of sight"
12. Santa Claus feature
13. Sea shade
14. Car nut
15. AUTHOR OF QUOTE
16. Number-one Hun
17. Fit together
19. Hormone
21. Classifies
28. *Les Misérables* author
30. Shade trees
32. ___ the Red (Norse explorer)
33. Average
34. After-Christmas event
36. Mins. and mins.
37. Old Fashioned, e.g.
38. Tropical tree
40. Asian coin
41. Dope
43. Half-human/half-goat
44. "Shoo!"
46. Bird beginning
50. Feel sick
51. Guitarist Liona
52. Omit
53. Beginnings
55. Small mammal
56. When tripled, name of classic war film
57. Morning moisture
58. Short performance?
59. Lofts the golf ball
60. To the left, at sea
61. PART THREE OF QUOTE
63. Worshipper
65. Cleanse
69. At a distance
70. Latin voice
71. Gushes
74. Pen-shaped tool
76. Haw's partner
78. D-Day beach
80. Hardens
82. Insect stage
84. Mary ___ cosmetics
86. Halts
88. Kind of lettuce
89. Privately
90. *The African Queen* scriptwriter
92. Dancer's dress
93. Signs up
94. Competitor
95. Descended from same mother
96. Abbr. after a name
97. Famed tenor of yesteryear
98. Smoothly
103. Passover feast
104. Squib
105. Pelvic bones
108. Drop off
109. Spare tire
111. Tricks
112. Nights before
114. Bit of butter
116. Amaze
118. Bar bill
119. I, to Claudius
120. Brazilian city, familiarly
121. Member of Ottawa team