

# Indexing in the Heartland

The newsletter of the Heartland Chapter of the American Society for Indexing

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## Spring 2012 Meeting Recap

By Margaret Hentz

### Presentations

In May, Meridith Murray hosted a very informative meeting on building your website with HTML or with website builder software. John Bealle showed us the “nuts and bolts” of using HTML to produce a website. John demonstrated basic editing elements and provided an extensive bibliography to resources including how to create tables and use cascading style sheets (CSS) for advanced features on a website. By demonstrating the newly redesigned Heartland Chapter website that uses Weebly, Carol Reed showed how to choose a template, add pages and navigation, add and format content, and add such extras as photos, contact form, and widgets. Other chapter members indicated what website software that they use to manage their own sites. This has motivated me to redesign my own indexing website. After lunch, Judith McConville showed how she uses InDesign software to create embedded indexes.

### Election results

As you will read elsewhere in the newsletter, the annual election results were presented in the business meeting and the incumbent Senior Co-President (yours truly) and the Junior Co-President (Meridith Murray) were re-elected. Cherry Delaney is our new secretary. Mary Peterson is continuing as treasurer. Thanks to Cherry and Devon Thomas of the Nominating Committee who contacted chapter members for interest in running for office. Also, thanks are extended to Sandy Topping, outgoing Secretary, for her meticulous work in the capturing and reporting on the meeting minutes for the last two years and also organizing the annual e-voting election.

Speaking of annual elections, I want to emphasize that the Heartland Chapter needs volunteers like you to help out on committees and especially to run for an office. Cherry and Devon were not able to get anyone to run for office this year so Meridith and I volunteered for another term and then Cherry volunteered herself to run for Secretary. Since the length of term for any officer is two consecutive terms, neither Meridith nor I can continue next year in our current roles. Therefore, if no one volunteers there is a definite possibility that the chapter may not continue. I feel that I gain so much from this chapter, via the newsletter, listserv, and especially the semiannual meetings. It will be a great loss to each of us if the chapter does not continue both in terms of networking and sharing our trials and tribulations. Thus, I challenge you to volunteer this coming year (just email Meridith or myself) or say “yes” when someone from the Nominating Committee asks you to consider running for office.

### Policy and procedures manual updates

Behind the scenes these past few months, Shelley Quattrocchi, Marilyn Augst, and I have been reviewing and updating the Heartland Chapter’s policy and procedures manual. Items such as the electronic voting procedure had to be incorporated plus standardization of terminology. A draft version with a summary of the changes was distributed at the business meeting. Since then, a few more changes have been proposed. Once the draft has been agreed upon by the chapter’s officers, I will distribute the draft for everyone’s review. It is not the most exciting reading, but the manual is needed during the transition of new officers. I plan to have the proposed final version voted upon at the business meeting in the fall.

## Brochure updates

Laura Ewald was also busy behind the scenes on updating the Heartland Chapter's brochure. Since we are a chapter with a relatively small membership, I am trying to solicit new members. I will be distributing this updated brochure to new graduates from local library schools and members of other information-related associations like the Special Libraries Association. It is also available on our chapter website so if you know of anyone who might be interested in joining the chapter, send them a brochure and encourage them to attend a future meeting.

## Website updates

Hats off to the website and newsletter committee comprised of Carol Reed, Paula McCoy and Laura Ewald (plus others who helped to proofread and check links) who redesigned our website and added wonderful functionality to it including an intuitive page hierarchy, integration of the newsletter with the website, and potentially an indexer listing. Go and explore its rich content!



1. Kay Reglein, Marilyn Augst, Christine Agostinelli
2. Back row: Thea Teich, John Bealle, Jim Fuhr. Front row: Christine Agostinelli, Shelley Quattrocchi, Cherry Delaney
3. John Bealle, Laura Ewald, Carol Reed
4. Clockwise from top: NAME, Sharon Hilgenberg, Judith McConville, Sandy Topping

# Keeping up with the Digital Trends Task Force

By Paula McCoy

The ASI Digital Trends Task Force has been busy leading and encouraging conversations through their LinkedIn discussion group. Earlier this year, they posted this:

*"The DTTF team shares the frustration some of you have voiced about the current LinkedIn mechanisms for finding items and discussions – and we've heard the same thing in other LI groups. So, we've decided to put together some suggestions for dealing with this until a better mechanism is available."*

The task force decided to focus on having a new discussion each month, where participants can go to read the latest news.

This month's "New on Digital Trends, May 2012 edition" includes a link to a story about an algorithm that was created to write sports stories (really!), an article about statistics on how screen size affects web viewing on tablets, and discussion about Microsoft's investment in Barnes & Noble. Also of interest: a soon-to-be-released study that found that 95% of publishers

"have had the experience of creating their e-books with one set of metadata and seeing an altered set of metadata at the point of sale, online booksellers like Amazon, Barnes & Noble, and Apple."<sup>1</sup>

<sup>1</sup> [http://www.digitalbookworld.com/2012/nearly-100-of-publishers-have-seen-e-booksellers-get-their-metadata-wrong/?et\\_mid=553899&rid=188486218](http://www.digitalbookworld.com/2012/nearly-100-of-publishers-have-seen-e-booksellers-get-their-metadata-wrong/?et_mid=553899&rid=188486218)

In October 2011, the DTF submitted a first proposal to the International Digital Publishing Forum (IDPF), outlining the need for indexes as navigational and semantic tools in e-books.<sup>2</sup> ■

<sup>2</sup> <http://www.asindexing.org/i4a/pages/index.cfm?pageid=3647>

# Building your Website with HTML

By John Bealle

Creating a web page is an important component of marketing your indexing business. In essence, it means your business is open 24/7. I have had clients tell me how easy it was to pass on a referral because all they had to do was give my web address. What they found there didn't need to be fancy, but they could see instantly what I did and how to contact me.

I have had no formal training in web design or HTML programming. When I designed my page, I did much the same thing I will be describing to you here. I created a simple, primitive web page, and then I looked for things I needed to know to make it better.

## Basic terms

A web page is merely a file on some computer that can be accessed on the Internet by a web browser. To design one, you usually create a document on your own computer and then upload (manually or automatically) to a "server" computer. It's the server that keeps you open 24/7.

There it will have an assigned address called a URL (for example, <http://domain/foldername/page.html>). When you browse the web, what you do is view files or documents such as this on some computer somewhere on the internet.

## Browser considerations

Most of the files you encounter have the extension ".htm" or ".html," which is an acronym for HyperText Markup Language. These files are designed to automatically open in your default web browser, such as Internet Explorer, Safari, Firefox, Chrome, etc.

Unlike file formats such as ".doc" (which are designed to open in a particular program), ".html" documents must accommodate lots of different browser programs. There are international standards that seek to define common ground, but generally web browsers cannot interpret some html commands. When you design a website, then, it is imperative that you test it with several browsers or it may not work for some clients.

## Text editors

HTML coding is in text format, so you can edit and create web documents with any text editor. See for yourself: right click any HTML document on your computer, select Open With, and choose Notepad. You'll see the source HTML file open. Some more sophisticated text editors have a feature called Syntax Highlighting that recognizes the HTML statements and color codes them for easy viewing. The Wikipedia page "Comparison of Text Editors" has a table that indicates which editors have this feature.

## HTML benefits

Most people nowadays use website builder software where you don't even see the HTML commands. You type, upload, and drag into a WYSIWYG (What You See Is What You Get) window that displays the page exactly (or almost exactly) as it would appear online. This is vastly easier than using HTML coding. The downside is that the resulting file size is much larger; also, it's more difficult to manage cross-browser compatibility. I'm "old school" and still code in HTML, mostly because I learned that way.

## HTML file structure

To see how HTML works, let's look at a simple document:

```
<html>
  <head>
  </head>
  <body>
    Your text goes here
  </body>
</html>
```

You see there are two sections "head" and "body." The body is where you put the text that appears on the browser screen. If you looked at this document, it would be a white screen with "Your text goes here" at the top. Notice that the html "tags" have beginning and ending markers. This is true for most all HTML commands.

HTML doesn't recognize Windows tabs or linefeeds, so the physical arrangement of the tags is ignored. The layout of the code above is for easy reading. You'd get exactly the same display with this:  
"<html><head></head><body>Your text goes here</body></html>"

## Text formatting

To do text formatting and layout you use HTML markup tags. These are fairly simple and few in number, so it's really not that difficult to create a basic web page as a beginner. For example "Your text goes <i>here</i>" uses the <i> tag to format the word "here" in italics. The <p> paragraph tag in "<p>Your text goes here</p>" will begin a new paragraph.

## Resources

There are numerous html reference sites that describe the tags. My favorites are HTML Help<sup>1</sup> and the W3 Schools HTML Reference.<sup>2</sup> Of the two, I find HTML Help a little easier to navigate if I need to find something quickly. But the W3 Schools site is very comprehensive and has live examples where you can try things out. It also shows browser compatibility for each tag, so you know in advance if there will be issues.

Because HTML is restricted to text characters (and because it uses some characters such as angle brackets and ampersands as tag markers), you'll need to use special character codes to produce any but the most simple characters. For example, the text "apples & amp;

oranges" uses the code "&amp;" which produces an ampersand. As you might expect, there are plenty of HTML character set reference sites, such as webmonkey.com.

## Anchor tags

One tag that is especially important is the <a> anchor tag. This highlights the anchored text so that it has an active function, the most important being an active link to another web page. For example, an active link to the special characters reference page might look like this:

```
<p>There are many helpful reference sites for <a href="http://www.webmonkey.com/2010/02/special_characters">special characters</a>.
```

On the screen the URL itself would be invisible but the text "special characters" would appear as an active link. When you hover over the text in your browser, the mouse pointer changes to the "hand" symbol and you can click to go to the linked page.

These tags are all that is needed to create a basic web page. However, there are two advanced topics that most people will want to use for a more attractive design. These are HTML tables (used for page layout) and CSS (Cascading Style Sheets, used for advanced formatting).

## Tables

To understand tables, first consider that HTML code is read in a linear fashion. So, with simple tags you can't do things like display text in a column or grid, or position an image so that text flows around it. To do this you must use tables. Here's a simple HTML table:

```
<table>
  <tr>
    <td>
      Cell one
    </td>
    <td>
      Cell two
    </td>
  </tr>
</table>
```

The "<tr>" tag defines a table row, and "<td>" is a table data cell. Since this table has one row with two cells, you'd see two boxes side-by-side with "Cell one" on the left and "Cell two" on the right. This is really all there is to know, but tables can quickly become complicated, as you can imagine. You can put most anything in a data cell. You can have tables within tables within tables. You

can put your entire page in a table, give it a fancy border, and assign a different background color to the table and the space around it. You can design a navigation panel that runs along the left side of the screen. You can use single-cell tables for sidebars or images, and have the main text flow around either side.

## Cascading style sheets (CSS)

The other advanced topic, Cascading Style Sheets, is used for more ambitious formatting. Let's look at the "Your text goes here" example with a style sheet included:

```
<html>
  <head>
    <style>
      body {background: #bbeeff}
      p.indent {margin-bottom: 0;
margin-top: 0; margin-left:10%; text-indent:-10%}
      h3 {margin-bottom: 1%; margin-top:
1%; font-size: 150%}
      h1 {text-align:center}
      li {margin-left:5%; margin-right:5%}
      td {padding:2%}
    </style>
  </head>
  <body>
    Your text goes here
  </body>
</html>
```

The style sheet goes in the "<head>" section, so you don't actually see it on the screen. You see in it a list of HTML tags with the formatting associated with each. The "body" style applies to the entire page body; the "td" style applies to all table data cells; the "p.indent" style applies to <p> tags that are named as "indent" paragraphs. The others <h3> and <h1> (headers) and <li> (list item) are also global styles.

HTML Help and the W3 Schools have handy help references for CSS.

In the example, the style definition "body {background: #bbeeff}" defines the background color of the entire page. The code "bbeeff" is a three-part hexadecimal number ("00-00-00" to "ff-ff-ff") that controls the primary screen colors, where "000000" is black and "ffffff" is white. The color "bbeeff" is a light sky blue, and it would have been easier to use the named color "light blue".

The use of percent as a measurement unit refers to the percentage of screen space, actually the percentage of screen pixels. You can also specify the exact number of pixels with the "px" unit. The advantage of percent is that it will look relatively the same on any screen, whereas exact pixel counts can vary dramatically depending on screen resolution.

The "padding" in the style "td {padding:2%}" refers to the space around the text inside a cell; in contrast, the "margin" of a data cell is the space outside the cell.

Notice that "p.indent" defines a margin of 10% and a text-indent of -10%. This is the so-called "hanging indent" that you use for source reference lists, such as listing the books you've indexed. To apply a style to a paragraph, you'd use the tag <p ></p>. Only paragraphs with that class designation would appear with hanging indent.

## Getting started

This introduction covers the main areas of HTML and gives you all you need to design a simple but attractive indexer website. In its essence, HTML is a very easy language to learn and use. The difficulty is all in getting it to produce sophisticated designs. However, there are two relative easy ways to learn HTML tricks.

The first is to look at how other websites do things. In most any website, you can right-click in the page and select "View Source." A new browser window will open that shows the raw HTML code. Most pages look very intimidating, but if you search for the text whose design you want to imitate you'll often be able to see how things are done.

The other useful trick is to use Google. At first I had no clue how to create a hanging indent in HTML. Then (many years ago now) I just Googled the phrase "HTML hanging indent" and the screen quickly filled with examples. I looked at a couple before I found the one I liked best. ■

<sup>1</sup> <http://www.htmlhelp.com/reference/css/>

<sup>2</sup> [http://www.w3schools.com/css/css\\_examples.asp](http://www.w3schools.com/css/css_examples.asp)

# Website Builders for Indexers

## The quest for fast, cheap, *and* good

By Carol Reed

“Website builders” is a pretty broad category for software products. At one end of the spectrum you’ll find packages that are powerful but training-intensive; at the other end are the drag-and-drop applications targeted to non-designers. At the spring meeting, we discussed the features, benefits, and challenges of inexpensive drag-and-drop website builders.

When we set out to update the Heartland Chapter website, we knew we needed to find web design software that was easy to learn, since it will be maintained on a volunteer basis by indexers with frequently hectic schedules; it would also need to be inexpensive or free, since the chapter runs on a lean budget. In addition, we needed a builder that would give us a reasonably professional-looking design. We wanted fast, cheap, *and* good (not “pick two,” as the old adage goes)—basically, the same things most freelance indexers are looking for when we create our business websites.

### Pros & cons of inexpensive, easy builders

There are a number of free website builders on the Internet. Many are easy to learn, promise to make maintenance and updates simple, and offer cheap or inexpensive hosting. The potential downsides are vendor or third-party advertising, the cost of hosting and domain registration, and design limitations. These downsides are understandable; after all, companies need to make money somehow, and any software that targets non-designers is going to be a bit of a one-size-fits-all approach to design. The challenge is finding the combination of benefits and limitations that works for you.

To find a builder that best fits your needs, start by checking software review sites such as cnet.com and playing around with demos of a few builders. For the Heartland site, we chose Weebly, so that’s what I’ll use as a representative package to discuss features you’re likely to find.

### Common features

With any website builder, the design process is the same. You start by choosing a design template, creating your pages and navigation structure, placing text and

graphic elements onto the pages, and adding and formatting your content.

Look for a builder that makes it easy to “rearrange the furniture” during your design process. Weebly’s drag-and-drop interface makes it a breeze to change your template or page hierarchy, and changes you make to your page hierarchy are automatically updated in the navigation tabs. Pages can be visible in the navigation tabs or hidden. For example, the online version of this article is actually a hidden website page; you don’t see it in the navigation tabs, but if you click on the link in the article index, you’re “here” on the page.

As you format your content, you’ll find that the formatting limitations in any builder are a mixed blessing: fewer choices means less temptation to over-format and clutter your design; however, you may want to do some formatting that isn’t a standard feature of the program. That’s why it’s important to play around with demos. Make sure the design limitations are ones you can live with, or ones you can get around with a little custom HTML.

### Custom HTML

Because the Heartland Chapter website is intentionally simple, we didn’t run into too many design limitations in Weebly. However, if you understand the basics of HTML, you can work around many limitations. Weebly provides a “custom HTML” element that you can drag onto a page in the same way you can drag a photo or text element. Into the custom HTML element you can paste code that you’ve copied from elsewhere or created from scratch.

Let’s say you want to include one of the many widgets, search boxes, or video clips available online. Most of these provide snippets of HTML code that can be copied and pasted into the custom HTML element. Or perhaps you want to create a numbered list but it’s not a standard feature of your builder. You can google “HTML numbered list” and find that a user somewhere has posted the code you need. You can also write code from scratch. W3schools.com provides starter code for a variety of functions, and you can create and test your HTML snippet before placing it into the custom HTML element.

## Questions to ask when choosing a builder

As you compare builders, ask:

Are the design limitations workable for me? Do they provide a custom HTML feature for workarounds? Can I live with their vendor advertising policy? Do they require a line with their name at the bottom of each website page, or third-party ads? If I want to eliminate the ads, how much does it cost? Am I required to use their hosting or domain registration? If so, compare costs before signing up. Is the company established enough to be there 2-3 years from now? (Then cross your fingers.) Do I have control over my HTML files? Make sure you have an independent backup of your current files so they're transferrable in case anything happens to your software or hosting provider.

## User-centered design

As I said at the outset, we're on a quest for fast, cheap, *and* good. Once you've found a website builder that helps you create a decent design at the right price, the rest of "good" is up to you. Understanding your audience and meeting their needs is critical to the success of your website, regardless of the tools you use.

Before starting on your website design or redesign, spend time thinking about your audience and their needs. The editors, authors, and publishers we work with have a particular set of stresses in their jobs. What frame of mind are they in when they visit your website? What are they looking for? How can you help them?

## Usability resources

Boxes and Arrows, <http://www.boxesandarrows.com/>.

Krug, Steve. *Don't Make Me Think! A Commonsense Approach to Web Usability*, 2e. New Riders Press, 2005.

Morville, Peter, and Louis Rosenfeld. *Information Architecture for the World Wide Web: Designing Large-Scale Web Sites*, 3e. O'Reilly Media, 2006.

Nielsen, Jakob. *Designing Web Usability*. Peachpit Press, 1999.

I've listed a few good references on user-centered design at the end of this article. Many of them echo the same basic advice for serving any online audience:

- Keep your text short and to the point!
- Avoid "happy talk" and instructions.
- Use your page titles as micro-content. That's what shows up in search results and tells your users whether your page will answer their questions.
- Use straightforward headers and titles; avoid clever headings that don't reflect the content.
- Write pyramid-style, like journalists do. Users will scan the first sentence and decide whether they should continue reading.
- Use keywords at the beginning of headings and paragraphs. This helps users scan content and also helps search engines determine what each page is about.
- Keep the graphic design simple. Make it easy to scan, and make the hierarchy of information visually obvious.
- View your website on different browsers and devices.

Finding the right website builder simplifies the design process so you can focus your time and energy on meeting your audience's needs. Fast, cheap, *and* good are definitely possible with the right tools and the right focus. ■

# Adobe InDesign CS6

By Laura A. Ewald

By now, most indexers will have heard of InDesign and embedded indexing. But if you are like I was, you don't know enough to consider whether or not it is something you should attempt. Now, thanks to Judith McConville's presentation at the Spring Heartland Chapter meeting, I know a lot more than I did and have a much better idea of what it would take to pursue embedded indexing with InDesign.

## Issues to consider

InDesign is Adobe's latest and greatest professional design and layout tool for producing high quality documents for print and on-screen delivery. It seems to be moving quickly through the publishing world, replacing Adobe's PageMaker and Quark Software's QuarkXpress as the program of choice for e-books and e-book indexes.

### The good:

- InDesign does have an indexing module that places index markers directly in the production files, a real advantage in that when edits occur which cause text reflow, the correct page numbers will be reassigned by the program. This function will continue even when the book is translated into other languages.
- InDesign does work across platforms, Mac to Windows, though there are some problems, such as Mac fonts not being available in Windows.
- You do have the option of doing an index in your regular indexing program, putting it into page number order then doing a cut-and-paste of entries into InDesign later.

### The bad:

- Exporting files to ePub format strips the indexing tags. (This is a bug they're working on with the Digital Trends Task Force.)
- You must continually purchase the software updates; the interface generally does not change, but some versions will not open older and/or newer files, so

you always need to ask the client which version they have to make sure you are compatible.

- You need all chapters up front, and you need control of the entire content while working; the client should not be working on it or make any changes to it but rather must preserve the one single file as is.
- Spell check does not work that well yet, and Judith recommended saving indexes as RTF files to open in Word for the spell check.

### What you'll need:

- InDesign software (for either Mac or Windows). Price is around \$650 with upgrades (essential) around \$150.
- A powerful computer. The program itself does not use that much space or memory, but working with the production files can, because they are very large files (most too big to e-mail). You cannot start without the complete book, so you need enough memory to have all content files open plus run the program.
- A lot of patience, according to Judith, both for the learning curve and the program's less-than-ideal indexing functionality.

### Bottom line:

- Get training in this program before you try it on your own. Judith recommended taking a 4- or 8-hour seminar that covers the entire program, so you have a better idea of how it all works before you tackle the indexing module.
- Learn the program well enough that you know what to discuss with the client before you start the index. Does the client really need an embedded index, or will an RTF copy you normally produce suffice? What version of InDesign is the client using? (If it is different than yours, make sure they are compatible!)
- From an indexing standpoint, InDesign is still really rough, but more and more publishers are demanding embedded indexes, and InDesign seems to be the current program of choice.

- The good news is you can charge higher fees because of the complexity of the process (especially the editing process). With the rise in e-book publishing, it may be something to think about adding to your indexing resume.

## Potential for indexing in InDesign

Judith McConville described InDesign as a good product, but one that is, in terms of indexing, best suited for catalogs. It is not really good for what indexers

usually do with indexing software: complex headings and subheadings, bold or italicized locators, conceptual indexing, multiple-authored books, etc. Judith did a demonstration of the software using a sample book file, and it was clear to me that this is a very complex software that is very good at its main function—design and layout—but very confusing to use for indexing. Still, the publishing industry is changing rapidly, and embedded indexing seems to be the wave of the future, so InDesign is a valuable tool to know. Here's hoping the Digital Trends Task Force can help make it more fully functional for indexing. ■

# Meet a Fellow Heartlander: Cherry Delaney

By Paula McCoy

Cherry Delaney has just been elected the new secretary for the Heartland Chapter, so it's a good time for everyone to make her acquaintance. She seems like an experienced, confident indexer, yet she's really a newbie who really enjoys getting together with fellow indexers. Her path to indexing is both instructive and illustrative of how diverse a group of people indexers are!

Like most book indexers, Cherry has a varied background, which she credits with helping her entry into indexing. Her undergraduate degree is in Foods and Nutrition from Purdue University, which led to her first job as a foods supervisor at Indiana Soldiers and Sailors Home in West Lafayette, Indiana. After a few years off raising her family and doing smocking, Cherry returned to college to take graduate courses in education, instructional design, and curriculum development. She was hired by the instructional area of Purdue's information technology unit. One of her major tasks was developing manuals for training staff on the Microsoft Office suite. She currently works in the Security and Policy area at Purdue, where her job is to make people more aware of how to behave securely with their computers and mobile devices.

As an instructor, Cherry says she has learned that being concise and specific aids in the quick retrieval of information. In the field of information security, data is critical from both a privacy and security standpoint.

Databases are only as good as the information they contain, and that information comes from human entry. That lesson leads naturally to the crux of book indexing: only the best-chosen, concise, accurate terms will aid the seeker.



How did Cherry get started in indexing? In her days of writing computer training manuals, she had done some embedded indexing—without knowing there was software that could do that and probably without knowing there was a name for it! In addition, she had talked to Margie Towery about indexing, and the idea intrigued her more and more as she began thinking about what she could do post-retirement that would keep her active intellectually.

So, without further ado, she jumped right in: Cherry completed the U.C. Berkeley indexing course last November, attended her first Heartland Chapter meeting in Spring 2011, and went to the 2011 ASI National Conference. There she took Seth Maislin's day-long workshop and other start-up sessions. She definitely has had a busy year—because all of this is on top of her full-time job!

This past January, Cherry created her website using Dreamweaver, hosted through GoDaddy.com. She had her business cards printed through Vistaprint. She also attended Jan Wright's workshop on InDesign, since she already used this tool. She plans to highlight all her training on her website to help spur some work in this area. Cherry's experience demonstrates how far someone can go using all the tools offered through membership in ASI, from seminars to formal training to networking and mentorship.

Cherry has benefited greatly from having Margie as a mentor. Since they both live in the Lafayette area, it is easy to get together to go over an index, or to chat on the way to a Heartland meeting. Cherry says Margie has let her sit with her as she indexes – an invaluable experience. Cherry even purchased the same indexing software so that if she had questions, she could count on Margie's expertise there as well. Cherry comments, "To

have a two-time Wilson winner coaching you might be intimidating, but Margie is very approachable and I know I can learn the correct way of indexing from her. She is very patient and helpful in providing insights." Cherry has also been reading the ASI publication *Index It Right, Advice from the Experts, Volume 2*, in which Margie is a contributor.

Cherry says she has "way too many interests." She quilts, gardens, makes precious metal clay jewelry (I'd like to see some of that!), and likes to read. She is secretary of the Friends of the Library board of the Tippecanoe County Public Library for the second year, and writes their quarterly newsletter. She lives in Lafayette with her husband and their six-year-old Wheaton Terrier, Casey, and their twelve-year-old tiger-striped cat, Max, a polydactyl who was rescued as a kitten. ■

## Readability

### Creating Better Indexes, Part I

By Margie Towery

Readability is one of what I call the "Ten Principles for Creating Better Indexes." Those principles (or characteristics) are accuracy, audience and access, clarity, common sense, comprehensiveness, conciseness, consistency, metatopic and structure, readability, and reflexivity. While all of these principles are finely interwoven in an index, it is possible to disentangle them a bit, examine what each means, and apply them to our daily indexing work. This is the first essay in a series in which I'll briefly consider each principle, explore some related tools for the indexer's toolbox, and provide some sources for further consideration.

#### What is readability?

Readability is a good one to begin the series, but what does it mean? *Webster's* defines "readable" as "able to be read easily; legible; interesting to read." Synonyms for "readable" in a thesaurus include intelligible, interesting, legible, and meaningful.

Readability does not appear as an index main heading in either Wellisch or Mulvany. Nancy Mulvany's *Indexing Books* includes a main heading for "readers," which is worth tracking through her text. Do Mi Stauber's *Facing the Text* has "readers' needs. See Context-based decision

making; Text/index distinctions." (This entry is followed by "Reading with no pressure [Hammock Method]," which was such a summery idea that I looked it up. It is a cure for indexer's block!)

#### Hallmarks of a readable index

A key function of an index is to recreate a text using clear, concise, alphabetical bits of information that direct the reader back into that text. Readability, related in part to the ease of navigating an index (usability), is developed in a number of key ways, a few of which follow (and the necessarily incomplete list highlights just how much the Ten Principles are interrelated):

1. The metatopic and structure must be clear and navigable. A visible metatopic structure aids to support or redirect reader expectations, which may be based on a review of the table of contents and book description or a quick flip through the text. In addition, many readers expect to find an entry for the main subject. Indexers can use that to gather general bits of information as well as to send the reader out to the most important main headings in the index. A table of contents approach may be useful for some texts (i.e., index main entries reflect the wording of the table of contents or use cross-

references to get readers from that wording to more appropriate main headings).

2. Parallel structure within the index, where appropriate, aids the reader's movement within the index and thus from the index to the text.

3. Consistency in topic treatment is important, too (e.g., in terms of both depth and equality of treatment, as well as wording for similar main headings).

4. Format issues require different handling for indented versus run-in style indexes. For example, in a run-in style index, long entries must be broken down into more readable chunks (in a book on four artists, the entries under each artist might be grouped by artistic ideas, career, exhibitions, and life).

5. The meaning of every index entry must be instantly obvious. Readers should not have to spend time trying to figure out what a main or subheading means (and in the "age of search," this is more critical than ever). This is why function words are necessary in many cases, despite the trend to delete them. I am not in favor of cluttering the index with function words, but of using them thoughtfully and consistently to make the relationship of the subheading to the main heading instantly clear. Consider this: history [main heading]: reading [subheading]. Is this about reading history? Or about the history of reading?

6. The first word should be the most important in the subheading (that is, after any function word such as "of"). In addition, for example, in a book about viruses, "viral" might not be the best choice for the first word in a subheading.

7. An index must translate jargon in some way, for those readers less familiar with the subject matter of a particular book.

## Tools and practices

This sounds like a tall order, but we do have excellent tools at our disposal. I suspect, for example, that all or most indexers are people who are intrinsically curious about words and how they can be used.

1. Wordplay is our best tool for all indexing work. An indexer must choose exactly the right word (or few words) to cover a complex idea.

2. Love the alphabet! Think about the logic of how those chosen words may fall in an alphabetical order (or other order as the case may be on occasion). If only death started with "Z"; instead, alphabetical order dictates that an individual must die before merrymaking.

3. Function words should be used to clarify meaning only as needed.

4. Natural (everyday) language is key, too. To disentangle complex ideas and jargon, indexers must digest the ideas and information in the text and present it in the index in an approachable manner. I'm not suggesting that we "dumb down" indexes, but we need to create indexes that are appropriate to a variety of users, depending on the text.

5. Format can be a help, if we understand the possibilities of each type.

6. Cross-training fosters greater creativity and sensitivity in developing readable indexes.

7. Step outside of the indexing box. Current research provides some fascinating ideas to consider as we create indexes and think about users and readability (see references below).

8. Read indexes.

## Cross-training

What is cross-training? I suspect you've all shopped for tennis shoes at some point and seen some labeled for cross-training. Wiki defines cross-training as "an athlete training in sports other than the one that athlete competes in with a goal of improving overall performance." I recently heard someone use this term in regard to writing, for example, a nonfiction writer sharpening her skills by also writing poetry (or maybe it was art, with an abstract artist painting realist landscapes, or painting in different media?). At any rate: Brilliant!

Being a little more relaxed about such things, I thought that indexers could cross-train by reading (another hammock approach). What would be a form of writing that would have some of the characteristics of indexing and yet not be, say, nonfiction? Poetry would fit the bill. I thought of William Carlos Williams's poem<sup>1</sup> about a red wheelbarrow. In just 8 lines and 16 words, it conjures much thought. Another poetic form that would be great cross-training is haiku. Haiku often has a zinger at the end which twists the meaning back on itself or highlights the entire sense of the verse. Indexers wouldn't want to duplicate that, because we want the important word up front. Still, haiku would be great cross-training with its sparing and precise, yet evocative, use of words.

I advocate strongly that indexers get outside of the indexing box and peruse research about areas that are related to our profession. We might ask, for example: How do readers make decisions about how to look for something in an index? One book about decision making presents the concept of choice architecture (Lehrer). *We are choice architects!*

There are also many books available on reading. How do people read? Check out the neurolinguistics of it all (Dehaene). How do we keep track of our thoughts in pursuit of something in a text by way of the index?

Evidence shows that we can only keep seven bits of information in our short-term memory – so consider how that affects what works best in an index (Miller is the original 1956 article on the seven bits; referenced and expanded in Klingberg in light of the current technological demands).

How do we construct meaning from reading? Alberto Manguel argues that reading is a “generative process” and that readers need to construct relations between “their knowledge, their memories, and the written” words (which is another great argument for making sure the main and subheading relationship is absolutely clear).

When I first started mentoring new indexers, one of my recommendations was the same that I had received when starting out: Read indexes, lots of indexes! But this is just the first step to understanding how indexes work. For me, the best part of the indexing journey has been, and continues to be, not just how to make indexes work (and to make them readable), but to really make them sing out in clear, concise notes that get readers exactly to the information they seek. ■

<sup>1</sup> <http://www.writing.upenn.edu/~afilreis/88/wcw-red-wheel.html>

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- “Readability: Creating Better Indexes, Part I” is used with permission from Margie Towery (© 2012).*

# ASI Conference Highlights

**Margie Towery** reflected on her conference experience: "The sessions I went to concerning epub's raised a lot of questions for indexers. And I came home determined to keep up with what's happening on the Digital Trends Task Force. I was really impressed with their accomplishments in helping to frame EPUB 3.0 in terms of indexes. . . ."

Free time was well spent, says Margie, "riding bikes with friends along the ocean boulevard, smelling the salt air! Several of us also went to Visions, an art quilt museum, as well as the San Diego Watercolor Society gallery, and up to Pt. Loma. It's always fascinating to me to get 'out and about' in a totally different climate."

**Thea Teich** recalls, "The several sessions I attended on the development of standards for e-books were enlightening and clearly presented just how complicated this effort is and how far reaching its ramifications will be. I remain interested in this new direction for ASI. Just the other day, in a completely different context, the potential for textbooks as e-books came up in conversation, and I was able to bring up some of the

salient points discussed at the conference that must be addressed before large numbers of textbooks can be converted."

**Cherry Delaney** enjoyed the keynote speech by Francis Lennie: "The topic was indexing as art – impressionism versus precisionism. She likened starting a new index to art. You start your canvas, with subject matter and determining the audience for whom the index is intended. . . . She contrasted precision to exhaustivity. A high level of exhaustivity would be expected in legal, medical, reference texts or cookbooks. A low level of exhaustivity would be expected of newspapers or bibliographies. Historical novels require both precision, names and events described within the book, as well as exhaustivity of information. "

Cherry also attended the InDesign indexing workshop by Jan Wright and Lucie Haskins. "It has a steep learning curve," Cherry notes, "but may be a way to attract more indexing jobs." ■



*Clockwise from top left: The beach at the resort; the meeting room on the sternwheeler; the Bahia Resort; Jan Wright; Madge Walls; Pilar Wyman; The sternwheeler*