

Conference 2019: Investigate, Invigorate, Innovate

Queen Mary University of London, 7–9 September 2019

Conference reports

Some organisations hold their annual conferences in the same venue year after year, disadvantaging members who are either forced to make long journeys, or can only attend occasionally (or not at all). In contrast, SI conferences are traditionally held at different venues around the country, which has proved to be a popular policy. After 12 years, it was high time to return to the London area, and over 50 members (ranging from students to Fellows) gathered at QMUL in September for a three-day event (from Saturday afternoon until Monday lunchtime).



During the last few years the Society has aimed to cater for members' varying needs and resources (time and money) by offering a variety of packages, rather than the previous 'one-size-fits-all' model. In 2019 members had the option of booking for the full (two-night) package, for one night only, or as day delegates. Despite the obvious accessibility of the venue (only a five-minute walk from the nearest underground station), and very reasonable costs for a London venue, the numbers attending were slightly disappointing. In addition, more members chose the non-resident option, either because they lived within striking distance of Mile End or had friends and family they could stay with (not something the organisers had anticipated).



The conference venue (with accommodation overlooking the Regent's Canal) largely met with approval, the major downside being the poor quality of the evening meals in the student refectory – thought to be the worst experienced in many years of conference attendance. However, the overall verdict of members attending the conference was that this was a very successful event, the majority regarding it as good

value for money and rating it highly for balance, variety, interest, enjoyment and relevance. And the helpfulness and friendliness of the staff, together with the stimulating company of fellow indexers, more than made up for the deficiencies on the catering front.

The conference programme was structured so that plenary sessions with visiting speakers took place on Saturday afternoon and Monday morning, with Sunday being largely devoted to break-out sessions. We are grateful to volunteers for the following reports on individual sessions.

Ann Kingdom

SATURDAY 7 SEPTEMBER

Faceted classification in support of diversity (Vanda Broughton, UCL)

In this session Vanda explained the continuing importance of facet analysis to knowledge organisation. All general classification schemes now show a facet-like structure and, in the new international standard, facet analysis is acknowledged to be useful in the construction of thesauri. It also features in search and retrieval tools. Vanda showed various examples of websites for products, where the filters used to search are analogous to facets: for example, searching for shoes by using filters for style, colour or size. Interestingly the use of the keyword 'facet' or 'faceted' in publications has



rocketed in the decade 2000–11 compared with previous decades.

Vanda then gave us a quick outline of the origins of facet analysis. It was invented by S.R. Ranganathan, who created the Colon Classification. He divided knowledge into five fundamental categories, the famous PMEST: personality, matter, energy, space and time. These categories could be combined to represent complex content. Apparently he was inspired by a Meccano set where all the differently shaped pieces are separated out in the box but can be combined to make many different models.

The principles of faceted classification were also used by the Classification Research Group in the latter half of the 20th century. The revision of the Bliss classification scheme, 2nd edition, became the most developed example of a faceted scheme in the western world. Vanda also talked about her work on the classification of religion and how a faceted approach can be used to deal more fairly with diversity and reduce bias.

Helen Taylor

The map and the territory: indexes and scale in the first centuries of print (*Dennis Duncan, UCL/Bodleian Library*)

We were delighted to welcome Dr Dennis Duncan back for another SI conference plenary. Dennis spoke at our Birmingham conference in 2016 and organised the 2017 Book Index symposium in Oxford. Dennis began with Ranulf Higden's *Polychronicon*, a 'medieval best-seller' with an index with instructions. Sometimes index locators didn't match the text, due to copying by different scribes, so incorrect index locators were scratched out and re-inked. Next was Ludovico Ariosto's epic poem *Orlando Furioso* (1516), containing lines on a reader who 'tooke his booke and searcheth in the table' for information: 'And straight in th'index for it he doth looke'.

From here we leapt to the twentieth century. William Buckley Jr wrote *The Unmaking of a Mayor* on the 1965 New York mayoral election. He sent a copy to Norman Mailer and included a note next to Mailer's name in the index – 'Hi!'. As Dennis said, we may never know if Mailer even saw this, but the joke succeeds anyway.

Historical examples continued with Lucius Flores in 1511 – 'Read, dear reader, the following table, / And soon under its guidance you will hold the entire work in your mind'. James Howell's *Proedria Basilike* (1664) features a note that there is no index as it would be 'a Volume as big as the Book'. Jorge Luis Borges' 'On Exactitude in Science' (1946) tells of a 'map of the empire whose size was that of the empire'. Shakespeare's plays also mention indexes, as in *Troilus and Cressida*: 'And in such indexes ... / ... there is seen / The baby figure of the giant mass / Of things to come at large'.

Conrad Gessner's *Pandectae* (1548) avows that indexes are 'the greatest convenience to scholars' and 'absolutely necessary' for finding both 'something one has read before' and 'something new for the first time'. The talk then circled back to William Caxton and early print, discussing the 'tables' in his *Golden Legend* (*Legenda aurea*, 1483), *Cicero*, *Polychronicon* and *Cato*.



In concluding, Dennis noted that modern embedded indexing is similar to paragraph-level locators in early indexes. He also said that he would like to include three indexes in his forthcoming book on the history of the index – one each by the author, a professional indexer and a computer. Here's hoping that this comes to pass but until then, thanks to Dennis for another gift of a talk on indexes in history.

Conference speaker dream team reunited: Sam Leith (left) and Dennis Duncan (right)

Paula Clarke Bain

Saturday concluded with a somewhat indifferent meal in the Curve (the student cafeteria) followed by an entertaining and very topical after-dinner talk from our president, Sam Leith, who battled manfully against the background noise of the air conditioning units.

SUNDAY 8 SEPTEMBER

Importance of local groups *(led by Three Choirs Group)*

This session discussed the importance of local groups within SI. The idea of local groups was first raised as early as 1963; however, it took until 1974 for the first group to actually be set up (in Liverpool). Other groups emerged in the 1980s and then the Three Choirs Group was set up in 1999. After this introduction, Rosi Dear spoke about the benefits of local group meetings. There is much research to show that meeting/networking in this way is good for freelancers: it improves physical and mental wellbeing, prevents isolation and, through meeting other people, attendees have an opportunity to build up a network of people who may be experts, or at least know something about, different fields/hobbies/specialisms. Pam Scholefield then briefly outlined her positive experiences of being in a group (job opportunities, support with indexing issues). The local group can act as the first point of contact as an alternative to posting a question to Sideline. Michelle Brumby and Helen Taylor, also Three Choirs members, then spoke and recounted their positive experiences, describing their local group as welcoming, enthusiastic and encouraging.



The key message of the session was that local group meetings can be whatever the members want them to be. Some groups meet regularly, others rarely. Some groups are more social, some may be work-focused, others a combination of the two. Comments from the session attendees were invited and a number of points were raised, mainly relating to those local groups which are struggling. Reasons for failing groups include:

- Unwillingness to give up 'work time' to attend a social meeting
- Fewer members in the Society as a whole
- Geographical dispersion (although Alex Peace mentioned that her local group in Canada was a 15-hour drive away)
- People cancelling at the last minute

The session closed with comments from the audience on their own group experiences. Ruth Ellis mentioned that local groups offer the ideal opportunity to 'try out' workshops before a conference. Other comments included former members of SI attending local group lunches to keep in touch, thus also boosting numbers, and, of course, the benefits to new indexers of this interaction with more experienced indexers. Local groups should thus continue to be encouraged and supported.

Kathryn O'Donoghue

Getting to grips with Index-Manager *(Caroline Diepeveen, Jan Rayment and Katharina Munk)*



This 2-hour workshop gave participants the chance to get hands on with the most flexible software currently available for embedded indexing. With only ten 'pupils' and three workshop leaders (Caroline Diepeveen, Katharina Munk and Jan Rayment), there was plenty of help as we each started to create our first index on our own laptops with the software. A

pre-conference Skype session had ensured that we had already successfully loaded the software and the sample text so that we were ready to make the most of the conference session. We were guided through the process of adding and editing entries, and exporting the index in Word. We looked at the various search options in the software for further creation of entries. The software is very flexible and functionality is being added to it on a regular basis. The session gave me the confidence to go away and experiment further with the software. Two hours only scratched the surface of its capabilities. The detailed slides have been sent to all attendees, including additional slides giving extra guidance, and they also cover working with InDesign files (for which the indexer does not need an InDesign licence as long as they have an Index-Manager licence). There is also the possibility of attending the regular webinar sessions for further guidance.

Ruth Ellis

Lives in miniature: indexing biographies and other life writings (*Christopher Phipps*)

Like a pianist who has, say, the Haydn sonatas ‘under his fingers’ from extensive touring before taking them into the recording studio, Christopher’s presentation of the essentials of biographical indexing draws on long experience, which he soft-pedals as ‘accidental expertise’. Sharing the construction of his masterly index to Peter Martin’s biography, *Samuel Johnson*, demonstrates the range of issues that face the biographical indexer.

Christopher proposes that the first 50 or so pages of the text allow the indexer to definitively structure what he calls the ‘secondary, complementary narrative’ that the index will furnish, and so here lies the indexer’s major effort. With this structure established, the indexer can edit as she goes and eschew a drawn-out revision when the raw indexing is done. In attendance was Ann Hudson, due to follow on with her own workshop, ‘How to edit an index’, so she was understandably aghast. As she is heard to say a couple of times most days, ‘but don’t do that in the training course’.

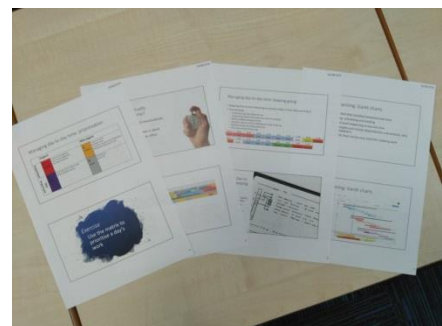
Constructing the entry for the metatopic – Dr Johnson in the example – requires compartmentalisation, characteristically as actions/events, character traits, relationships, views and work(s). Some of these (actions/events especially) lend themselves to chronological listing, others (character traits, relationships) to conventional alphabetisation. A sub-heading on health issues might also sit best chronologically.

Christopher reveals himself as a pragmatist. He can justify a string of locators where the individual in the entry is not central to the metatopic’s life because the proliferation itself indicates peripherality. He takes the view that the biographical indexer should be permissive with passing mentions, for there will be readers to whom these are significant. He also sees a useful function for the indexer in always entering the fullest version of identities, researching if necessary. Titles and (subsequent) name changes add value to the secondary narrative.

W. Stephen Gilbert

Time management (*Tanya Izzard*)

A small group of six or seven people met for this workshop and we discussed time management, forward planning and prioritisation. It felt as if most of us were aware of occasional shortcomings in our activities. Tanya recommended starting a review of our own practice with a time-tracking exercise which would help us understand our own productivity and give us a better idea of our ‘Golden hours’ – those times of the day when we are most productive – times that are different for everybody and vary according to personal circumstances (family commitments, etc.).



We considered a list of tasks and where they came in the Eisenhower Matrix (important/not important, urgent/not urgent), and briefly considered the merits of using children for their work experience placements (a euphemism for child labour!). Tanya then outlined a variety of very interesting forward planning techniques and tools available online, stressing that different tools may appeal to different people.

The inclusion of breaks and time off was emphasised as an important part of day-to-day planning as well as more long-term organisation.

Kate McIntosh

The good, the bad and the ugly: looking at published indexes (*Philippa Jevons*)

In this session we were looking at published indexes, some supplied by Philippa and some that we had been asked to bring along ourselves, with the idea of learning what to look out for that makes or mars a good index.



There were 13 of us taking part, ranging from students and beginners to seasoned indexers who could contribute from their own wealth of experience. We started by considering the benefits of examining published indexes: from seeing that we could indeed do better than some, to realising how much work does go in to producing a good quality index. We then looked at three sample indexes that Philippa had brought along, with the aid of some useful slides that pointed out the things to look for: including the design and layout, form of entries, cross-references, subheadings and locators.

We then split up into four groups (Philippa sharing out the experienced indexers amongst us) so we could apply these techniques to the indexes we had brought along with us and some more that Philippa had supplied.

Finally, Philippa discussed where we could look to find indexes to assess, useful when having to index a new topic, such as your local library, publishers' websites and the Amazon 'look inside' feature.

All-in-all, a useful practical exercise for an inexperienced indexer such as myself, to familiarise ourselves with good (and bad!) practice, and for those more experienced to share their knowledge and refine their own skills.

Phil Cross

IndexExploit and IndexConvert (*Barry Campbell*)



The session focused on IndexExploit, which we all had loaded on our laptops. Barry took us through the Options menu explaining the various settings, although without having a clear overview of what the program could achieve the purpose of these were a little confusing to start with. IndexExploit is a complex macro-based tool providing a superior interface for embedded indexing directly in a Word document, compared with the normal Word Mark Entry tool, and addresses some of the latter's shortcomings. In addition, because documents with already embedded indexes can be opened in IndexExploit, it is a tool which also offers some useful

facilities to indexers who prefer to create embedded indexes in dedicated indexing software with add-ons (such as Sky with WordEmbed) or by using specialist indexing software for embedding (such as Index-Manager).

IndexExploit can (for example): add letter suffixes automatically to entries where the embedded entry is located in a footnote or endnote; facilitate the correct XE syntax for forced sort of entries using a 'stop-word' file (essentially an 'ignore' and 'replace' list); move XE entries closer to the referenced bookmarks when Word has placed them in silly places; run a check to pick up errors in XE

entry formatting; or provide a warning if the XE entry has picked up a non-regular style of formatting (e.g. from a heading). More detailed information on these and other functions can be explored in the comprehensive User Guide, downloadable from Barry's website.

We also looked quickly at IndexConvert, although some participants were already using this. Essentially IndexConvert enables an index in Word (or pdf via Adobe Pro DC export) to be processed to produce a format suitable for one of the main indexing programs (Cindex, Macrex or Sky Index) and it can also format an index correctly for import into Index-Manager. IndexConvert also comes with a detailed User Guide.

IndexExploit and IndexConvert are potentially useful tools for anyone working with Word embedded indexes, whether creating them by using specialised indexing software facilities or embedding directly in Word itself.

Jan Worrall

Getting started: new indexers seminar (Nicola King)

Nicola King led an immensely helpful and enjoyable seminar for new indexers, in which she addressed the many questions that occupy student indexers as they complete their training.



Different approaches to securing that all-important first commission were considered first. Nicola emphasised the value of personal websites and networking, as well as ensuring a presence in the SI Directory and on the Professionals' Forum. Direct marketing to publishers, packagers, editors/project managers and authors is also important. Be prepared to target lots of your newly identified contacts!

When your marketing strategy pays off and commissions start to come in, it is important to prepare carefully before beginning work. From satisfying yourself that you feel confident to tackle the subject matter of the text, to clarifying the client's deadline and the price, it is essential to ensure that both you and the client agree what is required. It will be vital to develop a good working relationship with your client, throughout the indexing process. Maintaining a positive dialogue will help ensure clarity as the project progresses. When the index has been edited and sent to the client, there will be opportunity for you to provide feedback to the client, on issues such as factual errors, inconsistencies in the text and proofreading observations. At this point, the client may also make comments on the project, which will require discussion. Finally: make sure you get paid! Find out where to send your invoice and don't be afraid to chase payment, if necessary.

Many thanks to Nicola for putting so much work into this session. This student indexer feels much happier about what to do next!

Jane Crellin

How to edit an index (Ann Hudson)



I chose to attend this workshop to learn about how other fellow students and experienced indexers approach the process of editing. The session was well structured, starting with the basic routine checks to be done, such as spelling, punctuation, style and layout, before moving on to the more complex aspects of editing, including use of double entry or cross-references, locators and subheadings. We were reminded to keep questioning whether it is a useful entry that users will look up and find helpful. If something looks complicated and detailed, it probably isn't the most effective way to do it.

Ann shared useful tips, including entering provisional wording if you are struggling to get the phrasing right (with a note to revisit that entry after a bit of a break), to begin with easier tasks to

get your brain into gear (the 'low hanging fruits') before tackling the trickier bits, and to recognise when you have reached the point that your index is 'good enough'.

A handout giving further reading was circulated with details of Ann's online workshop, bookable through the SI website, together with a brief index in need of editing for us to take away and work through.

By the end of the session I better understood the importance of developing a systematic editing strategy, to be regularly reassessed as your skills evolve, ensuring that you are working as efficiently as possible.

Nicola Green

Looking after number one (Sue Goodman)



Sue Goodman's light-hearted and relaxed session introduced us to Qigong (pronounced chee-gong), a system of gentle, repetitive exercises co-ordinated with breathing which help to improve core body strength, joint flexibility and balance. As the name of the workshop suggests, the aim of this session was to encourage us all to include these gentle exercises in our working day – particularly useful given the sedentary nature of the work we do.

Sue started the session by inviting us to remove our shoes and, with slightly bent knees and relaxed shoulders and arms, to start to wake up our muscles by slowly moving the arms, neck and legs in turn. Moving on to rotations we circled our heads, shoulders, waist and hips and knees while concentrating on breathing deep into the abdomen. Eye muscle exercises came next as Sue asked us to look up and down, from side to side, diagonally and in a diamond shape. We then had to choose five focal distances (horizon, approximately 8-10 metres away, 3-4 metres away, arm's length and finger near the nose) to shift our focus quickly between; these exercises are particularly useful to relax the eyes after too much screen use. Now adequately relaxed and warm we progressed to stretches, becoming 'swooping dragons' and attempting to 'strum the lute'. Finally, Sue demonstrated 'meditative walking' – starting with feet close together and holding an imaginary energy sphere in each hand, the aim is to slowly walk for at least five minutes, shifting the body's weight from one leg to the other, focusing on the shift in weight to achieve a state of meditation. Experimenting with this method along the corridor outside attracted some bemused looks from those learning how to edit an index in the room opposite.

Most of us will be aware of the risks associated with sitting for long periods – an occupational hazard for indexers. Qigong is commonly prescribed in China to treat a wide range of conditions such as high blood pressure, back pain and heart disease, and its gentle movements and stretches can be easily incorporated into our working lives, as they are suitable for all fitness levels and (apart from the energy spheres) require no special equipment.

Michelle Brumby

Editors are like actors: what roles would you like to play? (Melanie Thompson)



The audience worked with Melanie to identify the *dramatis personae* involved in the publishing process and she explained how each of these roles contribute to the finished product. The focus then turned to the pivotal role of Copy Editor. They deal with the author and production manager and also liaise with many others: people who do the artwork, copyright clearance, picture research, typesetting, proofreading and, most importantly from our point of view, the indexing.

We built up a list of the knowledge and skills needed by a copy editor. These include not just English spelling, punctuation and grammar, organisational skills and computer skills but also a wide general knowledge and specific knowledge of their area of expertise. Copy editors must be able to focus on detail, but also keep the big picture in mind. They need a considerable amount of diplomacy and above all, empathy. Melanie highlighted the critical four Cs of copy editing: Communication, Clarity, Consistency and Cost. Copy-editing is one point in the publication process where the costs of book production can be controlled. It is particularly important to avoid badly defined requirements and poor-quality work which might result in repeating any stage of the process, as this causes costs to escalate rapidly.

Continuing the theatrical metaphor, ‘Treading the Boards’ illustrated the variety of working environments for copy-editors, such as fiction (proscenium arch), academic (in the round), marketplace (corporate publications) and improv (freelancers).

Melanie explained how to become a copy editor and the role of the SfEP. Finally, she checked on the audience’s alertness and memory in a team quiz between the penguins and the puffins, bringing an end to a lively and entertaining session. *Caroline Maxwell*

Lightning talks

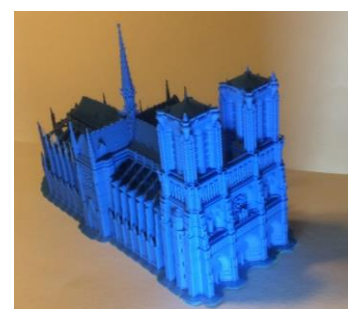
Following the AGM and ‘Society Matters’, Sunday afternoon concluded with four ‘lightning talks’ – a series of entertaining PowerPoint presentations. Included in the programme by popular demand, these often feature in SfEP conferences and had been enjoyed by SI members attending the joint conference in 2015. Lightning talks are meant to be snappy (ideally no more than 5 minutes),



illuminating and gone in a flash (hence the name) and an opportunity for novice public speakers to build their confidence in front of a friendly and supportive audience. In fact none of our four speakers could be considered novices in this respect.

Paula Clarke Bain kicked off the session with a fascinating account of the 29-letter Welsh alphabet. She highlighted the ways in which it differs from the English one, with its eight digraphs (like ch and dd), and the absence of several letters found in the English alphabet (e.g. k and x).

Next up was Barry Campbell with a talk on his recent birthday present – a 3D printer. In addition to Powerpoint slides illustrating some of the technical details of how this works, and his struggles to perfect his technique, he had also brought along actual examples of his work, including a model Notre Dame which was met with gasps of admiration from the audience.



After dithering about which of four possible options to talk about, Ruth Ellis decided against providing entertainment and instead took the opportunity to impart practical tips on how members could improve their entry in our online Directory of Professional Indexers. Especially relevant for newer indexers thinking about crafting their first entry, this was also a useful reminder for the more experienced to revisit their entries and look at revising them.



Finally, against a background video rather than a Powerpoint, one of our visiting international delegates, Alexandra Peace, President of the Canadian society, told us all how wonderful Canada is, especially Newfoundland, tempting us to join her there next year for the ISC/SCI conference.

Ann Kingdom

MONDAY 9 SEPTEMBER

Managing your money as a freelancer – six steps to financial well-being

(Catherine Pope)

Dealing with finance in any way is often a big turn-off for freelancers and indexers are not unusual in this regard. Catherine Pope's one-hour plenary provided six steps to financial well-being in an easily understandable and engaging session. Catherine describes herself as a Financial Coach rather than a Financial Adviser and the session was all about helping us as freelance individuals to develop healthy financial habits. These were grouped in a series of steps summarised as:



1. Keep personal and business accounts separate
2. Create and maintain a budget
3. Pay yourself first
4. Build an emergency fund
5. Insure yourself
6. Put money aside for tax

Each step was expanded with explanations and suggestions. Catherine's top tip (when discussing Step 2) of 'if you spend too much on books this month, you'll have to spend less on gin' struck a chord with several of us and warranted a tweet (thanks @PC_Bain) all of its own. More serious suggestions concerned the various types of insurance we might want to consider, paying off debts and the need to think critically about all outgoings.

Describing herself as a financial geek who submits her tax return on 6 April every year, she made everything extremely non-geeky. The session was essential stuff for students and anyone embarking on a career as a freelance indexer as well as a wake-up call or, at the very least, a reminder for established freelancers.

Time remaining for questions was well utilised by delegates discussing VAT, taxation as well as other issues.

Janice Rayment

The innovation imperative *(Kathryn Munt, Phoenix-Learning and Development)*

'Innovation is...something different, that has impact.'

Kathryn began by discussing her preferred definition of innovation. It must be accessible and work for the individual as well as for industry, she explained. It also doesn't have to involve technology, or never have been done before. However, it must always make an impact.

Global surveys show that the most innovative companies have three things in common: their use of artificial intelligence (AI), the adoption of platforms requiring user registration (and therefore data capture), and established ecosystems, permitting integration and relationships with other platforms.

Publishing is no different, with outsourcing (and the subsequent changes in workflow) the biggest innovation of the last two decades, creating a different shape for the industry. Kathryn shared examples, which included some familiar names.

A Venn diagram of publishers, vendors and freelancers proved slightly controversial – many felt that the placement and size of the freelancer circle was overstated – but it made the point that disruption cannot be halted. As freelancers we must get to grips with it, and as the Society of Indexers we have a stronger collective voice in the discussion, as Kathryn emphasised.



A case-study of ELT professionals showed freelancers banding together to create a platform which requires registration and payment from vendors/publishers – www.publishingprofessionals.co.uk. Kathryn acknowledged that this was an investment, but is happy to facilitate introductions between SI and other industry representatives.

Kathryn’s new company (Phoenix Learn) has established that communication between publishers, vendors and freelancers is an area requiring focus, but she openly stated that she did not yet have solutions to all of the questions raised. She highlighted again the importance of an innovation mindset, and to conclude, shared tips for developing that. She also shared her contact details with a view to continuing the discussion (kathryn@phoenix-learn.com; mob. 07774359245).

Fiona Firth

With thanks to Ruth Ellis and Paula Clarke Bain for the photos of conference sessions; presenters’ headshots supplied by presenters.