

Indexing Your Association's Periodicals

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Associations produce a great variety of periodicals for their members. Monthly newsletters, quarterly journals, annual standards volumes, articles that appear both on the association's web site and in print, articles that appear only in print, or only online, e-mailed updates and newsletters; all of these require an access tool as you build up a body of content that has value for your members.

Newsletters and monthly journals are one of the biggest benefits of membership in an association, and providing access to past issue content can be a valued service to your readers. Access can be provided in many ways, in print or on the web. You can post a search engine on your web site, you can print an index in your first or last issue of the year, and you can post an index on your web site as well. Some factors that should be considered when you look at indexing and the access indexes provide are appropriateness, costs, formats, time factors, skill sets you have in-house, and updatability.

Appropriateness: Indexing a set of periodicals is a good idea if your journal or newsletter is not already indexed by any of the professional indexing organizations, such as *Reader's Guide to Periodicals* or the *Social Sciences Citation Index*. Many well-known publications are already indexed by the large abstracting/indexing publication firms, and you can rely on their indexing to cover your needs in some cases. The smaller newsletters and journals that are not picked up by these services are targets for in-house indexing efforts, and larger journals may want to consider providing an additional focused in-house index if your readers find using the published ones too difficult to access, or the provided indexing is not deep enough for your needs. If your readers need to leave their office to get the index, it may not be accessible enough for them.

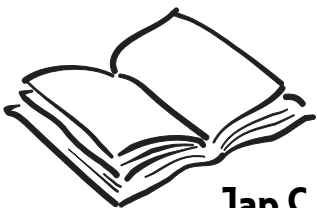
Costs and formats: The costs of having an index done will be affected by whether you want to have someone outside your organization do the indexing (a professional indexer) or whether you have someone with the right skills to do it in-house. You will also want to decide how much depth you want in the index, as that can increase the costs as well, in both time and actual index length. A 72-page newsletter that has ten concepts per page takes longer to index (and creates more printed index pages) than one where only three concepts are picked out per page. Authors' names, titles, and three subjects per article are a common approach for shorter indexes, and would cost less than more indepth indexing.

The American Society of Plumbing Engineers recently undertook the project of indexing their new magazine, *Plumbing Systems & Design*. Their decision was to index it very fully, since many of the articles contain up-to-date technical material their readers rely on, especially for design details or code change implications. Other associations, such as the American Society of Indexers, choose to index their publications less fully, while still picking up all personal names that appear. ASPE's index is fairly long, and will be published as an insert annually. ASI's appears in two places, on the web and as an insert in the printed newsletter every few years.

Be sure to think about articles that feature your members' names and chapter activities – these can generate a lot of entries, and your members will want to see their names in the index. Reports about society events can generate as many as 20 entries per page, making your index longer in print or on screen, and therefore taking longer to do. But these are critical entries. Everyone wants to see their name in print. Also consider your advertisers – do you need to index every ad? ASPE decided not to pick up advertisements, lowering the number of pages in each issue to be indexed by about half.

A simple printed index could range from \$3.00 per indexed page of content to \$7.00 per page, depending on the depth of indexing (how many entries there are on an average page). Those are prices per indexed page, not the pages in the index itself. If an out-of-house vendor does the index, they will most likely use a customized indexing software package to prepare the index, and send you a ready-for-layout file. Standalone indexing software packages can be purchased and used in-house, if a staff member takes the time to learn the package and the basics of indexing. (See information below for more details on these software packages.) These flexible standalone programs (Cindex and Sky Index are examples) build a database of entries, and can be added to infinitely. The files they create can be manipulated in many ways and formats, giving you lots of output choices. The American Society of Plumbing Engineers used this method to get their first year index done.

Alternately, an out-of-house indexer could borrow copies of your magazine's page-layout files to use the layout program's indexing module and insert index codes in your files. You then compile the index for printing using the layout program, and you also may have the ability to create an interactive PDF index with live links. PageMaker, Frame, and InDesign (among others) have these modules built in. This method, called "embedding," has the advantage of easy updating, but it's very hard to get the



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indexing right in the files on the first try. You will have to re-edit all of the files' indexing codes periodically to make sure the index's format always looks good when later material is merged in. Out-of-house indexers tend to charge more for this type of indexing, and for good reason. They not only need to know how to index, but must also own the layout program and know all of its indexing foibles well. Each program has its own restrictions and caveats it places on indexing. The indexer generally needs to take more time to do the work, as these programs are slower to operate than the standalone indexing packages are. If you upgrade your layout program later on, you may have some problems with earlier file coding, or may have to upgrade each file to be able to compile the older index entries with newer issues. If you switch programs entirely, your index codes will be unavailable in the new program, which could cause problems in your comprehensive index.

Providing a periodical index in HTML format, with links to each article (also in HTML format) will cost a bit more in time and effort as well. The indexer must then know HTML, or purchase an indexing program that specializes in HTML web indexing. The best idea is to embed pieces of indexing code invisibly in each article's web page, so you can pull the data to compile a new index as each issue is added. HTML Indexer is one software package that creates this kind of indexing. A complete duplicate set of web pages has to be made, with file paths correct, for HTML Indexer to work. For a newsletter that is updated monthly or less often, this is doable, but for extremely large sites, this is not feasible. A search engine would be the best choice then.

For search engines, the costs of searching your newsletter articles would be contained within the costs of having search implemented across your site. On a very large site, adding metadata to your newsletter files to distinguish them from other web content could help the search engine fine-tune its searches. Such metadata indexing can be implemented through a content management system, or by adding code directly to your web pages.

Time factors: Indexing or metadata work does take time. Some indexers can work their way through 50 pages in a day, others 100 pages. Much depends on the depth of the material and how much depth you want to see in the index. The *Plumbing Systems & Design* project for the first year consisted of 506 pages, which took 98 hours to index and prepare bibliographic data for abstracts, or 5 pages per hour. That's 40 pages per day, low on the speed scale. But these were big packed pages, with lots of Society news and names, and a set of full bibliographic data was created as well for eventual abstracting. As they say, your mileage may vary, and most likely will.

Skill sets: Indexing is a creative process, in which a person determines the critical pieces of *aboutness* in a newsletter article. Boiling an article down to three key phrases for a simple index, and deciding which bibliographic data should be picked up is an art that can be learned. Books such as Nancy Mulvany's *Indexing Books* help the beginning indexer get started. But there are also many professional indexers available who are happy to take this work on, freeing your staff for other tasks. One consideration is budget, one is finding staff with the gift for words, and another is establishing your controlled vocabulary, especially if you are creating metadata. Sometimes it is easier to let a professional build your index so that you establish a thoughtful set of key terms right from the start, adding predictability and consistency to your index through the years.

If you are willing to spend some time in the process, the American Society of Indexers Pacific Northwest Chapter has a Pro Bono program. If you have a project in mind, they will find a beginning indexer, and help the indexer complete your project with guidance from an experienced indexer. You can't beat the cost! The beginning indexer will get a resume project and very valuable experience. You will need to provide a bit more guidance, and work with the mentor and mentee to make sure your needs are understood completely. The Society for Technical Communication has used the Pro Bono program twice, once for a staff handbook, and once for a web site index, and has been very happy with the process each time.

Updatibility: Professional indexers also understand growth in the project, and can plan for it as they begin structuring. You need to think of the index as an ongoing project, an expanding universe of content. Whatever method you choose to create the baseline, you get to add new entries soon. If you are using a print index, it can be updated every year, every five years, or whatever interval suits your readers best. Web based indexes are best if they are updated immediately to match the site's content. You should keep compiling the new entries with the old ones, though, to keep the index easy to use, as multiple indexes are confusing to readers. Likewise you should revise the list of good metadata terms you are inserting for a search engine, keeping new technologies and other important new concepts up to date.

Adding an index and making your periodical content more available to your readers is a great service. With some planning and analysis, it can be a long term and fairly easy process to implement., and will win you points from your members.

Standalone Indexing Software
Cindex - <http://www.indexres.com> -
Macrex - <http://www.macrex.com>
Sky Index - <http://www.sky-software.com>

HTML Indexing Software
HTML Indexer - <http://www.html-indexer.com/>

Layout Programs with Indexing Modules
Quark - <http://www.quark.com>
Frame - <http://www.adobe.com>
PageMaker - <http://www.adobe.com>
Indesign - <http://www.adobe.com>
Word - <http://www.microsoft.com>

Information on Indexing
American Society of Indexers - <http://www.asindexing.org>
ASI Pacific Northwest Chapter's Pro Bono Program - <http://www.indexw.com/pnwasi/probono.htm>

Jan C. Wright is an indexer and controller of vocabularies who has been in the business since 1991. She's the editor of the award-winning newsletter *A to Z: The Newsletter of STC's Indexing SIG*, and is an active member of the American Society of Indexers, the Society for Technical Communication, and the American Society for Information Science and Technology. She has a Masters in Library Science and a degree in anthropology, and worked as a librarian and a desktop publisher before turning to indexing. She can be reached at jancw@wrightinformation.com, or through her web site at <http://www.wrightinformation.com>.