

# Conference Reports

## Case Studies in HTML Indexing, Heather Hedden (moderator), Ian Cooper, Timothy C. Craven, Cheryl Lemmens, David Ream, Pilar Wyman

Panelists spoke on the following: (a) the creation of a bilingual website index, (b) the creation of an intranet index, (c) the conversion of a book index to online format, (d) the creation of an online periodical index in CINDEX™ and HTML/Prep, and (e) the use of web indexing software XRefHT32.

Cheryl Lemmens initiated the presentation with an examination of The creation of the alphabetical index for the IASC/SCAD web site ([www.indexingsociety.ca/siteindex.html](http://www.indexingsociety.ca/siteindex.html)), which is presented in both English and French.

As both English and French are the official languages of Canada, all federal Canadian government websites, as well as some provincial Canadian government web sites and the websites of most corporations, non-profit agencies, etc., in Canada are presented in both English and French. While not completely bilingual, the IASC/SCAD web site also presents most of its information in both languages. The index is therefore bilingual, too.

In addition to touching on usability/indexing principles and HTML issues, Lemmens focused her discussion on the issues she faced in creating an English and French index for the web.

At American Express Canada, call center agents respond to over 100 inquiries a day. They need quick and easy access to relevant information on their reference intranet. Ian Cooper described how he compiled an A-Z site index for the AmEx Canada intranet.

Cooper began his presentation by defining findability, and explaining why they chose an A-Z site index for their intranet: "Some agents suggested that an alphabetical listing of all the items on the site would be helpful."

When it came to building the index, Cooper first researched online indexes and completed an online training course on building website indexes. He then used existing menu pages, site maps, navigation menus, etc., to create the basis for the index. He reviewed pages "extensively" to create subentries.

The main tool for finding information is now a one-stop search page accessible from every page on the AmEx Canada intranet. Two tools are available on the page: an A-Z back-of-the-book style site index and a keyword search.

The A-Z site index is now the more popular method for finding information, "but all are used fairly equally," Cooper said. One agent reported to him, "I don't find the actual search tool to be very helpful – as long as I know what I am looking for, the A-Z index does just fine." Another said, "I like using the search tool. I find it is much quicker at finding the information than trying to scroll through the index."

When asked how often you find what you're looking for, AmEx Canada call center agents replied, "Sometimes the A-Z index has items phrased differently therefore I look under the wrong letter," and "I find the ... search tool much easier to use and more powerful when



The opening screen of the IASC/SCAD web site index at [www.indexingsociety.ca/siteindex.html](http://www.indexingsociety.ca/siteindex.html).

finding answers."

But one went so far as to say, "I find on [the] index it takes you everywhere, it has all the links and answers the questions I have."

Next up was Pilar Wyman, who spoke about a conversion project she has been working on for several years. She described how the web version of a book index is prepared and published online. She showed the excerpts from the book index ("before") and the web index ("after") versions and explained how she had to provide more analysis for the web version of the index, how you have to have unique text for every locator so more specific locators for index entries.

In addition, she reported a new aspect to the conversion: ebook or PDA versions of the same index.

Her process, in general, for the conversions is as follows:

- 1) Write and update initial index content, with page numbers. Save as master index file.

For the *book* version:

- 2) Strip out third-level subentries, extra descriptive text, and text for general subentries. Save the file as the book version, and submit it to the compositor as an RTF file for print production.
- 3) Review typeset version before publication.

For *electronic* (web site and e-book) versions:

- 2) Using spreadsheet files supplied from the compositor, insert appropriate tags and ensure spreadsheet file index content matches master index file.
- 3) Test online/PDA index links to ensure tags are accurate.

Wyman also briefly covered technical aspects of the project, including how tags are created and inserted into the index files, and how the process has evolved over the years.

Dave Ream then covered how you get locators to link on a website. He showed several real-life indexes, including the *Rochester History* index. First, the index was created in CINDEX. Then, they used AddLinks to take the print locators and create anchor targets to link to text online. From CINDEX they exported an HTP file, and with

HTML/Prep created web pages. The files were then reviewed for quality assurance, and then posted to the Internet. The *Rochester History* index is now available online at [www.rochester.lib.ny.us/~rocbhist/main-list.html](http://www.rochester.lib.ny.us/~rocbhist/main-list.html). (See also "Raising' Rochester History: The History of an Index" in this bulletin, volume 9, pages 76-82.)

Other online index examples include the British Columbia Hansard Debates ([www.leg.bc.ca/hansard/8-2.htm](http://www.leg.bc.ca/hansard/8-2.htm)) (see also "Parliamentary Indexing" this page), BNA Labor Relations ([www.bna.com/lrr/lrrindx.htm](http://www.bna.com/lrr/lrrindx.htm)), and a fiction index at LevTech ([www.levtech-inc.com/milan/milan.htm](http://www.levtech-inc.com/milan/milan.htm)).

Ream noted that one of the most important aspects of this sort of work is teamwork. Just as Wyman had noted she regularly consults with the others involved in the production of these different versions of indexes, Ream encouraged indexers to consult and work closely with their clients and involve themselves in design and quality assurance aspects, and more frequent processing of data.

Finally, *Tim Craven* gave an all-too brief demonstration and summary of the main web indexing features of XRefHT32, his freeware package that provides a variety of functions to assist in producing website indexes.

XRefHT32 – pronounced "shref" – provides extraction of titles, keywords, and headings for automatic creation of index entries, though entries can also be added manually, and existing entries can be edited.

"Once a set of entries is established, you can output a formatted index as a single HTML file or as a set of linked HTML files."

XRefHT32 also has several utilities for modifying or creating HTML files. For example, you can add named anchors for headings or to specific words or phrases.

XRefHT32 is available online at <http://publib.wwo.ca/~craven/freeware.htm>. (See also the review in this bulletin, volume 13, pages

141-142.) A version for Java is currently under development and Craven anticipates the Java version will eventually be made open-source.



A manual for the program is available in the new book by James Lamb, *Website Indexes* (see also the review of this title on page 105).

This panel was organized by the ASI Web Indexing SIG. Slides and handouts from the panel presentation are available online at [www.web-indexing.org/presentations.htm](http://www.web-indexing.org/presentations.htm).

### **International Indexing Panel, Ruth Pincoc (moderator), Meral Alakus, Francine Cronshaw, Caroline Diepeveen, Jochen Fassbender, Jill Halliday, Louise Saint-André**

Indexers from around the globe discussed and answered audience questions about the unique challenges of indexing in specific countries and in languages other than English.

Topics discussed included:

- *Spanish-language issues*, such as the imprecision when translating English technical items, and the need for cultural sensitivity.
- *Canada's mandate for bilingual communications*, which requires indexers to address the conflict between the need for index translation and the requirement that each index feel like an original.
- *Turkish-based indexing*, including a lack of freelancers, the need for information policies, and the overriding need for indexing as a tool for understanding language, culture, and writings.
- *Dutch-language indexing*, with its challenging names and linguistic peculiarities, and its potential for use in 50% of all Netherlands publications.
- *German-language indexing*, including the challenges of building an indexing



Left to right: Wilson Award judges Carolyn Weaver, Deborah [unclear] awards professional recognition during the "In Search of