From the PNW-ASI Vice-President

Chapter meeting planning: a fantastic experience, good for the org, and great for your business. Oh, and it just got easier!

by Paul Sweum, 2012 PNW-ASI Vice-President

When I look at the shoes I’ve had to fill as the chapter’s Vice-President this year, and how to echo my sentiments with my meeting planning experience, I realize a stellar roadmap was set before me….so I’ll begin by describing the great work I had to build on and those I have seen in action since I attended my first PNW-ASI meeting in 2008.

First, there was Cheryl Landes, who was the very first person I conversed with at the 2008 Bastyr chapter meeting, which she arranged. Her ongoing selfless contributions to our chapter serve as a model for the rest of us to follow, and they continue to this day. Following Cheryl, Nancy Gerth brought in new marketing ideas and approaches, collated information on chapter members’ first indexing jobs into a wonderful resource, and then she penned the first article from the presidential rotation two years ago. It was an insightful article that framed our chapter’s evolution and where it was headed.

Following Nancy, Ann Yager brought in new ideas on our approach to chapter meetings to address current trends, which—almost more importantly—I saw as beginning a much-needed dialogue on the long-term fiscal solvency of our chapter, and ASI in general. Ann’s helpful article in the last edition of Indexers Ink emphasized at length, and in clear detail, the merits of volunteerism.

After Ann, Judi Gibbs brought a no-nonsense, all-inclusive approach to meeting planning and let her programming committee’s ideas bubble to the surface—focused with creating excellent chapter meetings spearheaded with effective presenters and workshops concerning current industry trends. She was successful, and I thought the meetings on her watch went great. We’ll hear from her in Indexers Ink later this year.

Simply put, all of that’s one heck of an act to follow!

Since I’m no longer the newest kid on the blog (umm, err, “block” that is), I’ll try to speak to a little personal experience and share my approach to the process of planning the PNW-ASI meetings for the current calendar year.

I had two meetings to plan for in 2012 (next year’s Vice-President [Veep] will only have ONE meeting to plan for—more on that later on). I approached meeting planning with the following criteria at the forefront:
1. Blending a variety of current trends and workshops focused on indexing methods, to serve as wide a range of indexers as possible.
2. Fiscal sensitivity: value for the attendee, and surgical mindfulness with chapter expenditures.
3. Solid proposals to the Board to minimize volunteer time and treasure—the benefit of an inclusive approach at the programming committee level.

4. Seeking guidance from the national level to advise the chapter and help create a roadmap for its future meeting strategy.

5. Continuing and expanding “the book”: the Vice-President’s handbook created by Ann Yager to assist the incoming Veep with meeting planning.

At Bastyr University in Kenmore, WA this last June, we kicked off the PNW-ASI spring meeting with a publisher/author well-versed with InDesign….and interestingly enough, an “Indexing with InDesign” workshop followed, which the publisher/author was able to lend his experience and insights to. From what I understand, a couple indexers who attended that meeting are now in this publisher’s rotation. In the afternoon, we brought in a trained professional to speak to office fitness, and learned about “Indexing Passing Mentions.”

We build on the spring program at our chapter’s fall meeting in Vancouver, Washington this coming September 29. The day’s focus will involve two content-filled workshops from two experienced indexers; PNW-ASI member and Basic Indexing (The Graduate School) instructor Scott Smiley hosting The Logic and Language of Patterns: A Deeper Look (for Cindex and SKY Index users) as the morning session, and 2009 ASI/H.W. Wilson Award winner Jan Wright hosting E-books and Indexing for the afternoon session. More on these workshops and meeting registration information can be found at: http://www.pnwasi.org/mygnext.html.

So that’s an overview of this year’s program…. and I owe the successes for this to the PNW-ASI programming committee, the chapter board members, and everyone who contributed with their volunteer time to make these meetings successful. Thank you!

Now, let’s chat about next year! 2013 presents some wonderful changes and—let’s be frank—a chapter meeting program that’s MUCH easier for the incoming Vice-President. That’s definitely a good thing. The big change we’re looking at next year is the fact that we’re reducing our chapter meetings from two to one per year, with the chapter meeting taking place over a fall weekend to be determined. This change is driven by a variety of factors.

First, one chapter meeting per year gives our chapter more options. It allows us to focus on a full weekend involving fantastic workshops and presenters. Since the spring meeting is eliminated, that affords considerable more time to plan, which opens things up to a wider pool of workshops and presenters to vet and choose from. The extra time, coupled with a fiscal-minded approach to maintaining the chapter budget, may leverage more resources and attract more attendees. This retooled environment should not only be easier for meeting planning, but enhances the probability of fiscal gains for the chapter on the back end of a quality, memorable meeting.

Second, it eliminates the perceptions and realities that the national conference is competing with local chapter meetings, and as a result opens up more opportunities for members to engage with their time, participation, and attendance at the national level. In my discussions last spring with ASI board members in San Diego, the general advice I received was to pass the sentiments of one chapter meeting per year to our board. Let’s just say that it didn’t take our board much discussion to concur.

Last, the reduced chapter meeting schedule makes the job of the Vice-President much easier, and doubles the preparation time for the position to plan a single meeting with the programming committee. This year’s planning committee divulged a wealth of experience, ideas, and perspectives; this not only helped me to plan quality meetings that offered value to attendees, but also guided me away from tiger traps and mistakes. Some goofs would definitely have taken place without the planning committee’s help and input!

In 2013 as chapter President, I’m offering my time, assistance, and meeting planning experience to the incoming Vice-President; the same way I have been supported by those in the presidential loop before my turn began this year. As I’ve indicated, we have a wonderful planning team that’s full of support and experience, and is on standby to lend a hand with anything that is needed from the new Veep. We’re here to help!

Ah ha….there’s one more little thing I’d like to mention about coming into the presidential loop: it WILL help your business. Yes, I’m talking about actual work—which is nice to your business—and your pocketbook. I’m seeing this phenomenon of increasing work happen as I write this—and I haven’t been anywhere close to my A-game with my marketing plan in recent months!

I believe it’s no fluke. As you pay it forward in the presidential rotation, you work your way into a leadership role, represent the chapter, and gain credibility and respect as an indexer who understands what it means to be a team partner and collaborator. People see that, including publishers, editors, and authors. Simply put, new doors will open for you.

This is based on my recent experience, since the beginning of the year. Doors opening present opportunities, which lead to jobs…..and strike when the iron is hot! When those doors open, you need to capitalize on those opportunities. Don’t feel guilty or that you need to hold back just because you’re a chapter Vice-President, President, or Past-President. You’ve earned it! The work is on the front end as Vice-President, and then you get to enjoy the fruits of your labors thereafter….so GO FOR IT!
In the last issue of Indexers Ink, we wrote about Twitter and how you could market yourself as a freelance indexer there. In addition to Twitter, there are several other popular social media sites where you can promote your services for free.

Of all the options available, LinkedIn is the most professionally-oriented and the oldest of the modern surviving social media sites. LinkedIn was founded in December 2002, almost one year before Facebook and MySpace came into existence, and was launched six months later. Since then, LinkedIn has grown to 150 million users in some 200 countries. So in this issue, we’re providing a brief introduction to LinkedIn and tips on how you can market your business’ services effectively.

What is LinkedIn?

LinkedIn is a purely professional site that’s designed to help you connect with current and former co-workers, colleagues, and other professional acquaintances. LinkedIn is based on the seven degrees of separation idea.

How is LinkedIn used?

LinkedIn is used for a variety of purposes:

Connecting with others you know professionally

LinkedIn is a great way to keep updated on where your colleagues are in their careers, such as where they work, where they are located, their professional interests, and their volunteer activities. It is also a great way to reconnect with colleagues in which you’ve lost contact. Ed and Cheryl have even reconnected with colleagues from the early days of their careers as technical writers.

Recently, Cheryl found one of the vice presidents she worked with 20 years ago in the marine transportation industry. He is still in the same industry but is working for a different company. Reconnecting with him helped her reunite with others from the same company, including some who have also moved to other companies. Because she still works as a contractor in this industry, these contacts now know how to reach her if they have or learn about any projects within her fields of expertise.

To find people on LinkedIn, select People from the drop-down list next to the search box at the upper right corner of your screen. Then type a keyword or two for the types of groups you want to find. As you type, LinkedIn autofills information, as in the example below when Cheryl typed Ed’s name. Either select a person displayed in the results from the drop-down list, or press the Enter key for more results.
LinkedIn also provides suggestions for connections based on your existing connections or information in your profile. These suggestions are displayed in a **People You May Know** box in the upper right corner of your Home page.

When you find people you want to connect with, click the **Connect** button, select how you’re affiliated with the person, and then write a brief note on why you want to connect. There’s a generic message that you can use, but we recommend customizing the message for each request. This helps someone remember you and assures the person you are not spamming him or her.

**Updating your connections on your status**

Are you working on an interesting project? Are you looking for work? Have you been invited to speak somewhere? Do you have any other professional news to share? These are all good reasons to post your status on your LinkedIn profile.

When you post your status on LinkedIn, this information displays through your connections’ news feeds on their home pages, so they keep updated on what you are doing professionally. They learn about your skills and professional areas of interest, so if they are looking for someone with your background, they will contact you. You can also see your connections’ statuses in the news feed on your homepage.

In addition, LinkedIn sends these status updates by e-mail weekly, which gives you extra exposure if you update your status regularly. We recommend updating your status at least every other week if you’re looking for opportunities. If you don’t have any new information to report, simply changing a few words in your status is enough for an update to display in the news feed.

Here are some examples of statuses from indexers. In the first one, Cheryl is promoting a meeting where she spoke in July 2012.
In this status, three indexers joined one of the indexing groups in LinkedIn. This group may be of interest to you, too, if you aren’t a member already. We will discuss groups shortly.

In this status, Madge Walls mentions that she has added two new services to her offerings.

When you create or update your status, you can also publish the information simultaneously on Twitter. If you do this, your status is limited to 140 characters (Twitter’s maximum). To publish simultaneous statuses, check the box at the left of the Twitter logo at the bottom of the status box on LinkedIn.

Here are the results on Twitter:

Share your employment history

This is the same as publishing an online résumé. This information is posted on your profile page. You can include a summary of your experience, your current and previous employers and the work you did there, your education, professional development activities (such as membership in ASI), and any awards you’ve received. You can even include a keyword list of your skills so that others can find you easily in LinkedIn’s search engine.

Some indexers link their websites to their LinkedIn profiles instead of publishing a separate resume. This eliminates the need for maintaining two separate versions of a resume online. For an example of linking from a business website to a LinkedIn profile, see Cheryl’s About page at http://www.tabbycatco.com/about.html.

Collect recommendations that highlight your talents. Some people are concerned that exchanging too many recommendations dilutes the value. Some are also concerned about having too many recommendations. Consider having just a few high-powered recommendations. Cheryl has 11 recommendations on her profile, mostly for her current positions, and Ed has seven. Four of Ed’s recommendations are posted for his current contract.
Here are two examples of professional references, one each from Ed’s and Cheryl’s profiles:

“Ed is the consummate professional. I thoroughly enjoyed working with him for the two years he contracted at Tenvela. He worked well with the API developers, requiring minimal input from them. Ed stayed on top of changes that needed to be documented by watching the daily check-ins and using search tools to find the differences that needed documenting. He enjoys finding the best tool for the job, and saving valuable time by using them wisely. Ed’s attention to detail was invaluable, especially during the end game before every release. Whether working off-site or in the office, Ed’s work was consistent and thorough. I trusted that he would do what he said, no matter what. His word is always good. I would definitely recommend Ed and hope to work with him again.” January 7, 2010

(Ind) Elaine Welch, Principal Technical Writer, Tenvela, Inc.
managed Ed at Tenvela

Peter Zarrella, CFO/ED/Sales, Phoenix Controls Corporation (colleague)
worked with you

“Cheryl is an extremely gifted technical writer who is able handle large amounts of detailed work in an accurate and timely fashion. She is a quick study of a company’s technology, which allows her to identify and correct inconsistencies in documents, while shortening the overall time requirements.” January 20, 2009

Request a new or revised recommendation from Peter Zarrella

Recommendations for your volunteer activities and speaking engagements are also nice to have. Here are two examples from Ed’s and Cheryl’s profiles:

“I had the honor of hosting two events in Seattle in which Ed was a featured speaker on March 26 and 27, 2010. The first was a full-day version of his course, “APIs and SDKs: Breathing Into and Succeeding in a Specialty Market.” Although Ed has presented this topic many times in a variety of venues, this was his first all-day course. His second talk, “Effective Job Search Techniques for Social Networking,” was one of the sessions at “The Marketing Conference for Creative Freelancers: Finding and Keep Work in a Tough Economy.”

Both of Ed’s presentations were outstanding. He takes a practical approach to the subject matter, based on his experiences in the field. His ability to explain highly technical concepts in simple terms helps students understand the material clearly. After each presentation, students praised him for providing useful, solid information that they could apply to their jobs, to a career change, or to expand their current skills or freelance client bases. They also appreciated his helpfulness in answering their questions during his presentations and offering to provide additional information afterward. In my role as a host and student in each event, I agree with them.

Ed was also a pleasure to work with throughout the meeting planning phases. I appreciated his insight and recommendations based on his speaking experiences at a variety of events, ranging from STC chapter meetings to WritersUA conferences. His input was extremely helpful in hosting two very successful events. I highly recommend Ed as a speaker in his fields of expertise.” March 29, 2010

YOU Cheryl Landes, Owner (Technical, Marketing, and Travel Writer), Tabby Cat Communications
was with another company when working with Ed at Tenvela

Patty Monn, Learning Prog Mgr for Professional Skills, Hewlett-Packard (business partner)
was with another company when working with you

“Cheryl has been actively involved with the Boston/Northern New England Society for Technical Communication for a number of years and continues to support the STC Technical Art Competition even after moving to the Seattle area. She has made a point to return to our Boston area competitions each year to help us judge our entries. Now, that’s dedication! It’s a pleasure to have Cheryl on our team as she’s an expert technical writer with an eye for creative design and illustration. Her contributions to our judging forum are very much appreciated and we truly value her expertise in the field.” November 10, 2008

For details on how to request recommendations, see step 2 of the section, “Creating a LinkedIn Profile.”

Research companies, publishers, authors, and editors to get an inside track on opportunities or as potential clients. This is accomplished again through the search box at the top right corner of your screen. You can search by company name or the person’s name. You can also look for
companies by clicking on the **Companies** menu and then entering the company’s name, one or more keywords, or an industry in the search box at the upper left of the page that displays.

You can also read the news about industries of interest by hovering your pointer over the News menu and selecting **LinkedIn Today**. This page has only a browse feature, so it’s hard to find articles by keyword. You can look at articles by category or industry, however. You can also follow these categories or industries.

**Create your own company page**

To do this, hover your pointer over the **Company** menu, and select Search Companies. Then click on the **Add a Company** link at the top right corner of the **Companies Home** tab, and follow the instructions.

Publicize events you are hosting, speaking at, or attending to encourage more participants and position yourself as an expert. As mentioned earlier, you can post this information in your status, but you can also publicize the events in relevant groups in which you are a member (more about groups below). You can also add the event to the LinkedIn site with the Events app. To post an event:

Hover your pointer over the **More** menu and select **Get More Applications**. When the applications page displays, click on the Event application.

Another page displays with some settings for the Event application on the right. Make sure both boxes are checked to display the events on your home page and profile, and then click the **Add Application** button.

Hover your pointer over the **More** menu again, and select **Events**.

Click the **Create an Event** button in the upper right corner of the Events page.

Fill in the details, and then click the **Publish** button. The event now displays on your home page and at the bottom of your profile.

**NOTE:** After you add the Event application and you want to create future events, skip steps 1-2.

Find and join groups of interest. To find groups of interest, select **Groups** from the drop-down list next to the search box at the upper right corner of your screen. Then type a keyword or two for the types of groups you want to find. As you type, LinkedIn autofills information, as in the example below when Cheryl typed the keyword, “indexing.” Either select a group displayed in the results from the drop-down list, or press the **Enter** key for more results.

When you find a group you want to join, click on the name of the group. Then click the Join Group button. If the group is **closed**, the moderator will review your request and approve you. You then receive an e-mail when your request has been approved. If the group is an **open group**, no approval is required. You become a member immediately. All group memberships in LinkedIn are free, but there’s a limit of 52 groups per person.

You can also browse lists of groups. To do this, hover your pointer over the **Groups** menu at the top of your screen and select either:

**Groups You May Like**—Here, LinkedIn creates a list of groups that may interest you based on the information you provide in your profile.

**Groups Directory**—This is a complete list of groups available on LinkedIn.
To view a list of groups you've joined or have memberships pending, click on the Groups menu.

**See who has viewed your profile**

To do this, click on the link in the *Who's Viewed Your Profile?* box in the lower right column of your home page. A page displays with a list of four or five people who recently looked at your profile. If you have a paid LinkedIn account, you can learn more information about these viewers, but the free account provides a lot of details if the viewers share them. An example from Cheryl's LinkedIn account is shown below. If you want to view any of these profiles, click on the person's name.

**Add the link to your LinkedIn account to your e-mail signature**

To find this link, go to your profile page and look for the category, **Public Profile**. Copy and paste the link there to your e-mail signature. You can also customize this link by clicking the Edit button at the right of the category. Cheryl's profile link is [http://www.linkedin.com/in/clandes](http://www.linkedin.com/in/clandes), and Ed's is [http://www.linkedin.com/pub/ed-marshall/0/501/898](http://www.linkedin.com/pub/ed-marshall/0/501/898).

So now that you've seen some examples of how information can be communicated on LinkedIn, how do you create a profile? Read on...

**Creating a LinkedIn Profile**

To create your LinkedIn profile:

1. Hover your pointer over the **Profile** menu and select **Edit Profile**.

2. At the end of each category are links where you can add information, similar to creating a resume. Click on those links and type the relevant information. Repeat this step to add more information about your work experience. The categories available in your profile are:

   - **Summary**—Include an overview of your experience here and any other relevant information about your services. Examples of Ed's and Cheryl's summaries are included below.

   **Ed's summary**

   Technical writer with over 24 years of experience producing online help, printed documentation, and Web documentation for highly technical products including Application Programming Interfaces (APIs), Software Developer Kits (SDKs), Java-based products, Web Services, speech recognition products, Visual Basic ActiveX controls, operating systems, databases, client/server products, and various programming languages.

   **Specialties**

   Producing API (application programming interfaces) and SDK (software development kit) documentation. Providing training on documenting APIs and SDKs. Providing documentation services to start-ups. Improving productivity and accuracy using advanced software tools. Analyzing documentation needs.
Cheryl's summary

Experience—List the companies where you’ve worked, along with your own business (if you’re freelancing), and describe the work you’ve done for each company.

Certifications—If you’re certified in any specialized areas, list them here.

Skills & Expertise—This is a list of keywords for the types of work you can do and the industries/topics in which you specialize. These keywords improve the findability of your profile when others conduct keyword searches. See step 4 for more information.

Education—List any schools where you attended, or received degrees or certificates. Include your majors or certificate specialties.

Recommendations—This information populates automatically when someone gives you a recommendation and you approve it. There’s also a link to the recommendations under the matching jobs in your profile.

To request a recommendation, click the Ask for recommendations link under the relevant job. You can also click the link with the same name in the Recommendations category. Then follow the instructions to complete your request. When you receive your recommendation, you need to approve it before it becomes visible on your profile.

NOTE: If you apply for any jobs on LinkedIn, a minimum of two references are required on your profile for most positions.

Additional Information, which is your websites (maximum 3), Twitter handles (maximum 2), groups and associations you’ve joined (LinkedIn groups you join are also listed here), and honors and awards.

Personal Information, which is your phone number, e-mail address, instant messaging address, birthday, and marital status. Ed and Cheryl do not list any of this information on their profiles, other than their e-mail address.

Contact preferences—Include why you would want someone to contact you here. You select these from a list provided from the Change contact preferences link. Examples include career opportunities, expertise requests, recommendations, consulting offers, business deals, and getting back in touch.

3. Also remember to upload a photo of yourself. We recommend including a photo of yourself on LinkedIn, because a photo enhances your credibility. Profiles that do not have photos are often associated with phishing or spam, so people are reluctant to connect with you. Use a professional head shot of yourself, dressed in business attire.

4. Selecting your skills from LinkedIn’s keyword list (Skills & Expertise) increases your
chances of being found when someone searches. Recruiters and businesses are using LinkedIn as a resource to find qualified candidates for jobs and freelance projects. You can list up to 50 keywords, so take as much advantage of this feature as possible!

Here are examples of keywords from Ed’s and Cheryl’s profiles, respectively:

<table>
<thead>
<tr>
<th>Skills &amp; Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>MadCap Flare</td>
</tr>
<tr>
<td>Javadoc</td>
</tr>
<tr>
<td>Doxygen</td>
</tr>
<tr>
<td>Documentation</td>
</tr>
<tr>
<td>API</td>
</tr>
<tr>
<td>SDK</td>
</tr>
<tr>
<td>Start-ups</td>
</tr>
<tr>
<td>FrameMaker</td>
</tr>
<tr>
<td>Online Help</td>
</tr>
<tr>
<td>Single Sourcing</td>
</tr>
<tr>
<td>Software Documentation</td>
</tr>
</tbody>
</table>

Sharing Your Private Information with Ads on LinkedIn

In August 2011, LinkedIn changed their policy about sharing your private information with ads. LinkedIn changed the default setting to allow your private information to be shared with ads. After much outcry, they changed the settings to where you will see only your connections who “follow” the target company.

Most social media experts recommend keeping this feature turned off.

1. After logging in to your account, on the drop-down list under your name in the upper right hand corner, click Settings.

2. On the Settings page, click the Account box at the bottom left corner of the page.

3. Under Privacy Controls, the first link should be Manage Advertising Preferences. Click on that link.

4. In the popup window, uncheck “LinkedIn may show me ads on third-party websites” and click the Save changes button. You should see the “You have successfully updated your advertising preferences” message at the top of your page. A white checkmark appears in a dark green circle to the left of this message as another visual confirmation of your changes.

For more information about this policy, see the following blog post from LinkedIn, [http://blog.linkedin.com/2011/08/11/social-ads-update/](http://blog.linkedin.com/2011/08/11/social-ads-update/)

Indexing Groups on LinkedIn

- American Society for Indexing (ASI)
  (NOTE: There’s another group named “American Society for Indexing” with no abbreviation following in parentheses, but it has been abandoned.)
- ASI Digital Trends Task Force
- Business Aspects of Indexing
- Classification and Metadata for Information Governance
- Controlled Vocabularies
- DAM Foundation (DAM is “Digital Asset Management.”)
- DAM News
- EDIT (European Distributed Institute of Taxonomy)
- Indexer Network
- Indexing
- Industry Taxonomy & Industry Classification Systems
- Information Architecture Experts
- Simplified English subgroup
- Taxonomy and thesaurus group
- Taxonomy architecture
- Taxonomy Community of Practice
- Taxonomy Tuesdays (for weekly brown-bag event in the Washington DC metro area)

References


More and more often, indexers are working with PDFs instead of (or in addition to) printed pages. You may have read Enid Zafran’s article *Making the Most of PDFs*, in the April–June 2011 issue of ASI’s quarterly *KeyWords*. She describes the advantages of copying and pasting from PDFs into her indexing program, suggesting that indexers copy names, book titles, foreign words, and place names. Many of us are doing exactly that.

While I appreciate the advantages of copying from a PDF, I get tired of pressing those keys repeatedly and clicking the mouse again and again to accomplish copy and paste functions. In addition, when I copy from PDFs, a surprising number of undesirable things tend to appear in the copied text—extra spaces, line breaks (or “/nl” codes that represent line breaks), spaces where there was a ligature or a thin space, or text appearing in a font that I don’t want—requiring additional steps to clean up.

What if you could accomplish the same things in fewer steps? What if you could do the same thing more efficiently? A few years ago, I became intrigued with the idea of using a macro to speed up the process of copying text from a PDF into SKY Index. A SKY macro couldn’t do that because it can only work *within* SKY, and an Adobe macro (if there were such a thing) couldn’t do it either, because it would only work *within* a PDF. We needed a third-party program that could interface between the Adobe application and SKY. I found such a program, called Macro Express®, and I was able to write macros in this program to speed up the process of copying text from Adobe Reader or Acrobat into SKY, Cindex, or Macrex. A few people tried out the macros and had ideas for new ones, and other people had more new ideas, so now they’ve grown from two or three macros to over forty. That’s how Megabit Macros were born—and they’re still growing.

When you use these macros, you simply select the text you want to copy in your PDF file and press one keyboard shortcut. The corresponding macro copies the text, cleans it up, pastes it into your indexing program, and (in some macros) returns the focus to your PDF. Hence, you’re saving a minimum of six keystrokes or mouse clicks, and the clean-up includes removing those line breaks, extra spaces, or special fonts from the text. It performs all these steps for you so you don’t have to!

There’s more. In addition to copying, pasting, and cleaning up, some of the macros invert personal names. Others italicize what they copy, while some split up a series of names or other items into individual entries in your indexing program.

Here are some examples of things the macros can do beyond simple copying. Suppose you have author names in a list, as shown on the left side in the following table. After you select the group of names, the appropriate macro copies them and—in a few seconds—results in separate entries in your indexing program, as shown on the right side in the following table. Some macros delete parenthetical dates, others add them to each entry, and all of them delete notations like “(Eds.).”
Or the macros can take a series of ordinary items separated by commas and turn them into separate entries:

| Kansas City, Abilene, Cottonwood Falls, Garden City, and Leavenworth | Kansas City Abilene Cottonwood Falls Garden City Leavenworth |

Unfortunately, the macros can’t do everything we might wish for. Adobe does not give us any way to automatically “grab” the page number, for example; the indexer still has to take care of that. Also, the macros can’t copy every possible diacritic (they don’t handle Unicode), but you’re still saving a great deal on time—and sparing yourself of repetitive stress. The keyboard shortcuts for Megabit Macros don’t interfere at all with the shortcuts in your indexing program, and they’re customizable. There’s even a popup menu of the most common macros.

Best of all, you don’t have to understand the details of how Megabit Macros work or learn how to write macros yourself. You simply install the Macro Express program, load the macro file for your indexing program, and learn the keyboard shortcuts for the macros you want (or just use the cheat sheet). If the existing macros don’t do what you want, please don’t hesitate to ask. Who knows, you might be the person with the next brilliant idea!

So far, the macros work with Cindex 1.5, 2.0, and 3.0; SKY 6 and 7; Macrex 8; in Windows XP, Vista, and 7; and every version of Adobe Reader and Adobe Acrobat from 7 to X.

Megabit Macros do something that your indexing program’s macros cannot do—interface between a PDF and your indexing program—and the goal is to save time and improve accuracy. You can read more about them on my website, www.edit-mb.com/megabit, where you’ll find several downloadable lists with more examples of what the macros can do. My hope is that in the long run, these macros will save indexers a lot more time than I spent writing them!
Why My Legal Indexes Will Never Win a Wilson

by Maria Sosnowski

Legal indexing has some conventions that are different than other types of indexing. Those conventions will vary depending on the audience of the book. This article focuses on law-for-lawyer books, rather than legal for the public or textbooks.

For some indexes, such as periodicals, clients want enough information in an entry so that a reader can scan it and know what the article is about. It’s almost an abstract rather than a traditional index entry. These are examples from a corporate newsletter:

**Aiding and Abetting**

Liability, primary versus aiding and abetting, where underwriter distributed but did not write false and misleading prospectus, court seeks SEC amicus brief (1st Cir.)

**Bankruptcy**

Parmalat fraud claim, bankruptcy trustees fail to show liability of third parties (U.S., rev den)

In this context, jurisdiction is important, so every entry will indicate the jurisdiction of the case. The entries have enough detail to know who was involved, what the issue was, and what the result was.

One criteria for the Wilson is that entries have a certain elegance, like thoroughbreds. To the contrary, legal entries are like workhorses, trying to summarize what may have been a 400-800 word article or case summary into 20 words or less.

Another facet of legal indexes is attention to detail. If one section of the book covers several topics, those topics will each be pulled out; even if it results in repetitious use of the same section number.

See sections 11.189 and 11.191 in this example:

**Air Quality**

Air quality attainment plans

Federal state implementation plans and, 11.189, 11.191, 11.212

Five-percent annual reduction goal for, 11.190

Implementation of plan, adoption of locally effective regulations, 11.191

Indirect source regulation, 11.191

Procedural requirements for adoption, 11.197

Transportation control measures, 11.191

When required, 11.189

California Air Resources Board

Air quality attainment plans, submission to Board, 11.189

The same locator can be used several times in order to provide greater access to information to the reader. That would probably fail the “over-indexing test” as a Wilson candidate.

Another feature of many legal indexes is breaking down a range into its bits so that the reader can better find the level of detail needed such as this example:

**Ambulances**

Generally, 9.22

Authority for, 9.23–9.24

Pre-hospital emergency medical services, 9.25
While in a non-legal index, an indexer may want to use these four sections as a range. They are broken out here to provide a greater level of specificity, even if all four of those sections are short enough to be on the same page.

In the next example, the Revenue Bonds Law is both a stand-alone main heading, as well as belonging as a sub under Revenue Bonds. If this was a non-legal index, I wouldn’t post it as a sub since it’s the main entry immediately before this one:

**Revenue Bond Law of 1941, 5.225–5.226**

**Revenue Bonds**
- Generally, 5.223
- Debt limit issues, 5.224
- Revenue Bond Law of 1941, 5.225–5.226
- Voter approval, when needed, 5.225

We also love orphan subheadings, although I doubt you will find any in a Wilson index:

**Antitrust**
- Immunity of local government from, 13.153

It goes back to that concept of detail, so the reader doesn’t have to go to the section to find out what about antitrust is there—but can see enough in the index to know if going to the section is worthwhile. That old rule you’ve heard about telling a reader where to look, rather than telling what he will find when he gets there, is too restrictive.

**Definitions** is a common main entry, and also as a sub under each heading as needed.

Cross references generally run off of subs, which provides more specificity and avoids having a huge string of See Also cross references:

**CONTRACTS**
- Ambiguities in. See **AMBIGUITIES**
- Bad faith. See **BAD FAITH CLAIMS**
- Basic contract principles
  - applications as part of policy, 2-2:4, 3-1:2
  - compliance with contract terms necessary for enforcement, 2-2:5
  - types of disputes, 2-2:1
- Breach. See **BREACH OF CONTRACT**
- Construction. See **CONTRACT CONSTRUCTION**
- Form contracts, use of, 3-1:1
- Formation. See **CONTRACT FORMATION**
- Good faith and fair dealing duty. See **GOOD FAITH AND FAIR DEALING**
- Interpretation of policies. See **POLICY INTERPRETATION**
- Reinsurance, requirements for, 8-9
- Rescission. See **RESCISSION**

And as you can see, headings are often in bold. This allows for easier scanning for main entries in an index that can otherwise feel cluttered, given the number of subheading levels. Three levels of subs is common.

To help guide the reader in headings that can be very long, cross references “see above” and “see below” are used. In the example below, many subs were deleted in the example to save space. In the sub ‘Drafting considerations’ the reader can see that if he wants to read about how to amend easements, he should look above, within the same main entry, and for the subheading “Amending easements” to find his information. This avoids double posting the 4 entries as a sub-sub-sub, yet tells the reader where to look. If there was an entry for “Amending easements” under the main entry “Easements” instead, then the cross reference would have said “See under Easements” which tells the reader to find the subheading “Amending easements” under the main entry “Easements.”
Bastyr’s Author Kickoff

Commencing the Spring 2012 PNW-ASI meeting at Bastyr University in Kenmore, WA

by Beth Chapple

David Burch, the founding director and author at Starpath Publications (www.starpathpublications.com), gave us a lively talk to start our day. He divided his presentation into three sections: about Starpath’s printed books, e-books, and his forays into indexing.

Printed books
David’s background is in physics, with a Ph.D. from University of Washington. Starpath started in 1980 and has about fifteen titles. Their current project is to “re-own” their own books, which were published with a variety of publishers, including McGraw-Hill. As an author, he has not been pleased with working with some of the large publishers in the past, finding it hard to communicate with them and see the changes that are made.

E-books
Starpath had copy-protected e-books way back in 2002. Adobe’s digital rights management policies changed in response to work Starpath did with them. Starpath has developed an open-source e-reader known as elibra (see elibrabooks.com).

Indexing
David shared with us some stories of his tribulations with indexing his own books, and his interest in having his books professionally indexed, with embedded indexing in InDesign. He recommends the Adobe forum for technical information, suggesting we do a search for “InDesign indexing.”

Conservation Easements
Generally, 6.1
Amending easements
Generally, 6.46
Costs of, who pays, 6.47
Procedures for, 6.48
Reasons to amend, 6.47
Drafting considerations
Generally, 6.37
Amending easements (see Amending easements, above)

Space is seldom an issue in legal indexes. Clients want a thorough index that is easy for readers to use. It’s not unusual to have a 10% index or more.

This highlights a few of the differences in style between legal and non-legal indexing.
Indexers in training are routinely advised not to index passing mentions—brief items in the content that are not discussed in detail—and to focus exclusively on indexing blocks of text longer than a couple of sentences.

It was the contention of Judi Gibbs and Cheryl Landes, in their presentation at the Spring 2012 Chapter meeting, that passing mentions may indeed contain valuable information that should be picked up by the indexer, and that ignoring such brief items may do a disservice to the index user.

The following are a few nuggets gleaned from the session:

• Passing mentions are contextual depending on the source of content; there are differing standards for biographies, technical books, genealogy books, and scholarly publications.
• Judi spoke exclusively from her own experience, including referencing Do Mi Stauber’s “low hanging fruit” from her book *Facing the Text*.
• There was discussion about simply exercising the use of common sense when considering the relevance of passing mentions….again, much of this is predicated by the type of content being indexed.
• At one point in the presentation, Judi claimed that “we’re taught not to index anything less than a couple of paragraphs.” This is an interesting perspective….the authors of this article would have been curious to hear Judi elaborate further about this, but the session was short on time.

This session was a very intriguing start to a larger conversation about passing mentions that can be helpful to indexers. In addition to the presenters’ own experience, one suggestion to give attendees more examples to work with might involve polling other indexers about how they handle passing mentions.

Indexers share differing views on the issue of passing mentions, and approaches echo a variety of factors, including training, personal indexing tendencies, publisher styles, and audience. However, perhaps the heaviest factor involves the indexing demands of different disciplines, which should be part of an ongoing discussion among indexers that this session has begun to shine a spotlight on.
Pt. 1: My Weekend in Paradise
by Cheryl Landes

The road appeared endless. I’d left the asphalt in Sandpoint, Idaho, many moons ago, so it seemed. I continued checking the detailed printout on the passenger seat of my car to verify that I was indeed heading in the right direction. The farther I drove, the deeper into the forest and the more rugged the rocky dirt logging roads became. But the landmarks described on the printout continued to match my sightings, so surely I wasn’t lost.

The road narrowed and steepened as the rocks and sharp curves increased. Then came the sharpest curve and steepest incline, when suddenly, the road ended at a two-story yellow house near the highest point. On the left, Lake Pend Oreille glistened like a sapphire through the trees.

This is Nancy Gerth’s house.

Nancy and her husband, Jimmy, and two of their friends saw me pull into their driveway with a confused, lost look on my face. Nancy and Jimmy are accustomed to that reaction from first-time visitors. They welcomed me inside, and Nancy gave me the grand tour.

We entered what’s best described as a daylight basement. Nancy showed me my sleeping quarters on that level, which is really like being on the ground level of the house—although the house is built on a hillside. I had a wonderful view of the woods, where Nancy said a deer or two and other critters might appear.

Then we climbed the stairs to what’s considered the first floor, where the living room, bathroom, and kitchen are located. The kitchen overlooks the lake, and the living room faces the forest. A door connects the living room with a porch on the outside of the house.

The top floor contained the office, two bedrooms—one the master—and the master bathroom. The office faced Lake Pend Oreille. The trio of giant picture windows revealed the most spectacular view I’d ever seen of the lake aside from taking the chairlift to the top of Schweitzer Mountain near Sandpoint. The view from here was much closer than from Schweitzer, but the panorama from Schweitzer was more expansive. As I looked at the view, I wondered how Jimmy and Nancy could ever finish any work from there. I would have been distracted, but at the same time, I totally understood that the view could also provide inspiration and keep the creative juices flowing.

Nancy and Jimmy’s setup is mostly self-sufficient. They use solar power, with a back-up generator when needed. They have a garden and chickens, which supplies an ample amount of their food. The rest comes from the markets in Sandpoint.

This particular weekend in June 2009 was extra special, because Nancy scheduled an indexers gathering at her house—the first ever. Now that I had arrived and received the orientation of this incredibly beautiful setting, I thought “indexers retreat” would have been a more appropriate description of our upcoming adventure. Here we were in a place that could truly be called Paradise.

Tracy Burns, Tami and Scott Robinson all joined us the next day for dinner. Tracy returned home after dinner, but Tami and Scott stayed for the rest of the weekend. Before they arrived, Nancy and I spent most of the day hiking a trail overlooking the lake and stopping at one of her neighbor’s houses for a plant tour. Larry, the neighbor, is a self-taught botanist. He’s like...
a walking plant identification library of the Idaho Panhandle. We explored the plants on his property, as Larry and I took photos along the way.

The next day, after breakfast and a long relaxing chat, Larry stopped at Nancy's place to host a plant tour of her property. Tami and Scott joined us for the tour. Our tour was interrupted by a rain cloud, so we continued to talk about plants in the house.

The day after, I packed the car, said good-bye to Nancy and Jimmy, and continued my journey. I made a big loop, stopping in Missoula for dinner with the local indexers and on to Yellowstone and Grand Teton National Parks before returning home to Seattle. I still have fond memories of those three beautiful days and hope to return someday.

Pt. 2: When you go to Five Eagles Peak
by Paul Sweum

Five Eagles Peak, Nancy Gerth's mountaintop abode, is situated between Garfield Bay and Bottle Bay—with a breathtaking panorama overlooking the expansive, spidering Lake Pend Oreille.

You'll have to drive on unpaved roads to get there, so an all-terrain vehicle is highly advised.…I tried negotiating the way in a low-riding Prius, and it wasn't pretty. However, the destination and great company was well worth the trip up the mountain.

In terms of my visit, my experience was very similar to that of Cheryl and Judi's, and they have covered nicely all the aspects of Five Eagles Peak in their articles.

Our hosts cooked up some spectacular meals, made us feel very comfortable, and took us on a boat onto the lake for a refreshing swim—which rivaled Lake Chelan's waters — and that's a high compliment from this Chelan veteran!

The rooftop system of electric and hot water solar panels, along with a building arsenal of power storage for those times it's needed, was very impressive. Another memorable highlight was venturing into the backyard and picking berries….merely a few steps from the back porch!

However, the most striking impression I was left with was the silence. As an urban dweller most of my life, it's difficult to absorb the idea of such peace and quiet until you're actually in it. If you didn't speak at Five Eagles Peak, you literally heard NOTHING. No neighbors, no motor vehicles, no distant freeway noise, no sirens way off in the distance….and this is midday in the heart of summer, no less. The silence was literally deafening….a cliché, but so very true!

Pt. 3: Nancy's Place
by Judi Gibbs

In September 2011, I made my pilgrimage to the amazing North Idaho Indexing Sanctuary. Since I was arriving after dark, Nancy met me a few miles from the house and guided me through the maze of dirt roads leading to her incredible abode.

After a good night's sleep, I made my way up the stairs to the living room and kitchen. From there, I explored the deck, with its splendid view of Lake Pend Oreille. Steps from the deck led into the gardens, where I said hello to the hens.

Nancy and her husband, Jimmy, like to allow the hens access to fresh grass, but coyotes are a hazard. Jimmy has arrived at a creative compromise by giving the hen house a small yard fully fenced around the edges and overhead. Both hen house and fence are on wheels, and every day Jimmy wheels the “henistoga” so the chickens have fresh grass daily. The hens give back by supplying excellent fresh eggs daily. Nancy treated us to some for breakfast.

The sanctuary is completely off the grid. In the hot, sunny months, solar panels on the roof provide electricity. In the wet winter months, a small dam supplements the solar panels with hydropower. A propane-powered generator backs up the solar panels and hydropower. When I was there, the area behind the dam was totally dry from months of hot, sunny weather, but the solar panels were operating at full capacity.

Since the weather was hot and sunny, Nancy suggested that we go sailing. We descended what seemed like an enormous distance to the lake and jumped into their sailboat. Jimmy
guided the sailboat well away from shore, and we all took the opportunity to cool off with a swim in the lovely lake water.

We finished the day with a wonderful dinner assembled using many components from the sanctuary. Neighbors joined us, and discussions continued until nobody could stay awake. After another wonderful night’s sleep, I arose to a breakfast of Nancy’s wonderful homemade lox. Nancy is a cook extraordinaire.

The gourmet breakfast was followed by a tour of the hydropower setting. It is a little way from the house, but Nancy and Jimmy assure me it is quick and easy to reach when they need to do maintenance. Since it only produces during the winter months, they can do all maintenance by snowshoe.

As I got ready to depart, I reflected back over the previous couple of days. The setting is truly extraordinary, and a defining feature is the sound of silence—a feature that becomes particularly pronounced at night.

The indexing sanctuary is a challenging place to live. Every season brings chores that must be done. They cannot be put off, and some of them are demanding—but the indexing sanctuary is worth every ounce of effort.

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**2012 PNW-ASI Fall Meeting**

**Saturday, September 29**

**Water Resources Center**

**Vancouver, WA**

The Pacific Northwest Chapter of ASI will be holding a fall chapter meeting on September 29 in Vancouver, Washington. We will also be gathering for dinner at 6 pm on Friday, September 28 at McMenamin’s on the Columbia and Saturday at Thai Orchid (dinners not included in registration fee). Our board meeting will be held Sunday at the Comfort Inn in downtown Vancouver.

Saturday program:

**The Logic and Language of Patterns: A Deeper Look with Scott Smiley**

Patterns, also called pattern matching or advanced find and replace, are a powerful tool for finding entries or for changing a whole set of entries that meet a particular criteria or “shape.” They allow you to go beyond finding a particular word or letters to finding some particular combination characters. For example, suppose you need to find all numbers that are years, in the 1900s or 2000s; or suppose you need to take any text that is in parentheses (but letters only, not numbers) to change them into italics. With many of these scenarios, changing those entry by entry eats at the clock—but with patterns you can make these searches or replacements all at once—saving valuable project time.

However, patterns are difficult for many indexers to get their minds around. How do you decide if something will work with a pattern, and how do you figure out how to turn that problem into a pattern? How about all those darn symbols? For users of both Cindex and SKY Index, this workshop will explore the logic of patterns—how to think about them, how to translate a problem into a pattern, and the language of patterns—those symbols that make up a pattern and tell the software what you want it to do.

Symbols for both SKY Index and Cindex will be covered, including the new pattern symbols in Cindex 3 (some have changed since Cindex 2). This will be a more in-depth treatment of the topic than given previously, including a chance for workshop participants to bring their own pattern questions to discuss and problems to resolve. Whether you have used patterns in the past and wish to use them more (or “more better!”), or if you have never used patterns and want to explore new ways of making efficient use of your indexing software, this workshop is for you.

**E-books and Indexing with Jan Wright**

Have you been asked to index a book that will be coming out with an e-book version? Join us as we cover the current state of indexes in e-books and devices—which has seen significant developments in the last year in the industry and though the efforts of the DTTF.

There are big issues facing readers who try to use an e-reader index, and big issues for publishers trying to make indexes work. We’ll cover the problems indexers can discuss with clients, make sure you have a good understanding of the issues, and present some solutions so that you can recommend ideas to your clients.

A matrix of approaches to e-book indexing will also be covered. If you have an e-reader with indexed books on it, please bring it as part of the Digital Petting Zoo, when we all break up and look at examples of e-book interfaces, working indexes, and total failures.

Please see the next meeting page at the PNW-ASI website for more details.
Margaret Berson
Margaret has been indexing since 2008 and was an editor of books for many years prior to that. Most of her indexing and editing work is topics related to computer software, and she does both embedded and back-of-the-book indexing. Before entering the field of publishing, she worked in the import-export business, and then worked for a science museum. She lived in Montana and California before moving to Portland, Oregon.

www.edit-mb.com

Erica Cardio
Erica has worked in the printing and publishing field for over 20 years and is the owner of The Last Word Indexing & Design. She enjoys graphic arts and does the page layout for Indexers Ink and web design for the PNWASI chapter.

Beth Chapple
Since 1990 Beth Chapple has offered editorial services (dellby.com/chapple) to a variety of clients. She is a copyeditor, proofreader, substantive editor, and indexer in English, Spanish, and German. Her specialties include travel, textbooks, management, language teaching, and education. In her spare time she plays the trumpet, flies single-engine Cessna airplanes, and keeps up with aviation safety issues.

Judi Gibbs
Judi Gibbs, the current PNW-ASI President and owner of The Write Guru, has been indexing since 1999. In previous lives, she was a university librarian, medical and technical writer, and studio potter. She lives and works in Seattle.

Cheryl Landes
Cheryl Landes, an award-winning technical writer, STC Fellow, and Certified Professional Communicator through the Association of Women in Communications Matrix Foundation, is the founder and owner of Tabby Cat Communications in Seattle. She has more than 21 years of experience as a technical writer and indexer in several industries: computer software, HVAC/energy savings, marine transportation, manufacturing, retail, and the trade press. An active member of STC and the ASI on the chapter and national levels, Cheryl speaks frequently at STC and ASI meetings throughout the United States and Canada. Follow Cheryl on Twitter @landesc and visit her website at www.tabbycatco.com.

Ed Marshall
Ed, a STC Associate Fellow, runs Marshall Documentation Consulting, with more than 24 years of experience. He specializes in APIs/SDKs (application programming interfaces/software development kits), Web services products, and documentation aimed at developers. Ed has developed expertise in using tools to “let the computer do the work,” such as advanced tools for files editing, comparison, search, and text replacement. Follow Ed on Twitter @EdMarshall.

Maria Sosnowski
Maria started her business, Index-Plus (www.index-plus.com) about seven years ago. While most of her work is either legal or social sciences, she enjoys the variety of other topics. When not indexing, she runs a public law library where she uses indexes, both good and bad, every day. Maria joined the Indexers Ink staff in a “light editorial role” following the spring meeting at Bastyr University.

Paul Sweum
Paul, the current PNW-ASI Vice-President, has been running Top Hat Word & Index since 2006, where in addition to indexing he offers editing and technical writing services. Before becoming a solopreneur, Paul’s primary experience took place in town planning, where he served a handful of jurisdictions in Arizona and Washington for over a decade. He also specializes in the Earth sciences, sports, travel, and the arts, to name a few. Paul is on Twitter @TopHatIndexer.

Carolyn Weaver
Carolyn has been a freelance indexer since 1991. She is a past ASI President (2007-2008) an ASI Co-Webmaster, and currently chairs the ASI Training in Indexing and Wilson Award Committees.

www.weaverindexing.com

PNW-ASI Info:

Fall Chapter Meeting on September 29 at the Water Resources Education Center in Vancouver, Washington. Details at the PNW-ASI website

Board Meeting Minutes
Available online at http://pnwasi.org/indexing/board-meetings/

Marketing Tips for New Indexers
The Marketing Tips Booklet has personal stories of how some of our members got started in the indexing business. The booklet is available at http://pnwasi.org/indexing/marketing-tips/

Publisher Honor Roll
The PNW Chapter has developed a process through which we can recognize publishers who value well-crafted indexes and respect the indexers who produce them. More information online at http://pnwasi.org/indexing/publisher-honor-roll/

PNW-ASI serves indexers in the states of Alaska, Idaho, Montana, Oregon and Washington, as well as in the Canadian provinces of British Columbia and Alberta. We also provide general indexing information to publishing professionals and organizations, especially in the Pacific Northwest. We are a regional chapter of the American Society for Indexing (ASI).

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