

**Canberra Society of Editors  
and  
Australian Society of Indexers**

**PARTNERSHIPS IN KNOWLEDGE**

**First joint conference of indexers and editors,  
Rydges Lakeside Hotel, Canberra, 20-23 April 2001**

**Proceedings Part 3**

**The workshop reports  
and  
the hypothetical scenarios**

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## Workshop 1: Website indexing with HTML Indexer

The workshop, presented by Glenda Browne, consisted of two sections. First, the principles of indexing in a web environment, showing how web indexing is different from print indexing, and citing examples of websites that illustrated web indexing principles. The basic principles of indexing in print were reviewed as they are equally applicable to web indexing.

The second section consisted of a demonstration of one Web indexing tool, HTML Indexer, in which workshop participants worked on a trial exercise indexing the December 2000 issue of the AusSI Newsletter. A set of course notes summarised the presentation and demonstration.

The workshop was based on material in the book *Website indexing: enhancing access to information within websites*, by Glenda Browne and Jonathan Jermey. Information from the book is available at [www.optusnet.com.au/~webindexing/Webbook](http://www.optusnet.com.au/~webindexing/Webbook), and further information at [www.optusnet.com.au/~webindexing/webrefs](http://www.optusnet.com.au/~webindexing/webrefs). Other references cited were 'Information Architecture for the World Wide Web', by Louis Rosenfeld and Peter Morville, and 'Beyond Book Indexing', by Seth Maislin.

A number of tools provide access to information on the Web, each with their strengths and limitations. Search engines, metadata, and library-style categorisation and classification of websites are useful for searching the whole web, or for constructing subject gateways, while back-of-book style indexes are best suited to individual websites and documents within websites.

Presented in a familiar book-style format, back-of book style indexes have advantages over other web access tools at because they provide immediate access to selected and specific information through multiple entry points, sub-divisions and cross-references, and are browsable, thereby overcoming problems of misspelling and inexact matches. Their disadvantages are the cost of using skilled indexers, the need for updating and for large sites or groups of sites, for coordination and quality control, as well as the time delay between creation of the resource and its addition to the index.

Basic policies of print indexing apply equally to web indexing. Issues of consistency of usage, user audience, purpose of index, depth of indexing, selection of material, format, filing order, whether multiple indexes or single index, type of entries to include, use of cross-references must all be considered in web indexing. Additional policy issues for web indexes include format in which index will be supplied, responsibility for loading, and updating and archiving schedules and arrangements.

Web indexing has some important differences from print indexing. Using the power of Internet technology, website indexes provide links instead of the page references of print indexes, and those links can be to a wide range of material both internal and external to the website, including documents (University of Texas Policies & Procedures at [www.utexas.edu/policies/hopm/](http://www.utexas.edu/policies/hopm/)), periodicals, multimedia collections (Online & Ondisc Conference '99 at <http://olod99.cadre.com.au/html/toc.html>) and databases.

Decisions need to be made on what level to index to, where the link will point to – top of article, section or paragraph, how much material will download with each link, the use of frames, and whether external links will be included or not, considering the issue of checking their currency.

The Web offers the facility for innovative ways of organising indexes – geographic instead of, or as well as, the traditional alphabetical (e.g. Australian Libraries Gateway). There are also various options available for display which need to be considered in index design.

Features of a good website index were covered. The loss of context in a web index compared with print means that extra signposting and navigational features are required. In an alphabetical index, the alphabet bar is always displayed, and major headings may also be displayed in a highly structured index. Fonts, colour and explanatory text should be used to distinguish types of links – whether to a major piece of information, just a passing reference, or to an image. Ideally multiple locators should be avoided. The index should be linked to and from the home

page, and to other main areas of the website. Introductory and searching notes are important, and a feedback link useful. For a well-designed index see <http://www.aussi.org>

A number of web indexing tools are available, including plain HTML, WinHelp-style programs, databases (e.g. <http://www.ca.com>), CINDEX plus HTML /Prep, and HTML Indexer (<http://www.html-indexer.com>).

HTML Indexer automates some aspects of website indexing on IBM-compatible machines. The program creates default index entries for all selected files, and for all named anchors within those files. The defaults can be edited or overwritten, and must be saved if required. The index entries

are stored in the source HTML files, so the index can be refreshed when files are added or moved. As the index entries are included in metadata tags they can be found by search engines.

The workshop exercise demonstrated the basic features of HTML Indexer, including selection and viewing of source material, blocking non-content files, building the default index, deleting and editing default entries, adding entries, setting filing order, cutting and pasting text sections from the source file, creating subdivisions and cross references, using Preferences to set style settings, and selecting output browser for output.

Colleen Mock

## Workshop 2: Database Indexing

A workshop entitled 'Database indexing' begs the question: Why index a database? Databases have search facilities built in, don't they? Isn't that the point of them?

It turns out that database indexing is not indexing *of* databases but indexing *for* the main public bibliographic databases, such as APAIS, Streamline, NCJRS\* and others. In this nicely-paced workshop, Lynn Farkas first introduced her audience of seven librarians, indexers and editors to the concept of database indexing and then showed us where it fits in the knowledge continuum. She outlined the sub-categories of database indexing and the skills or qualities a database indexer needs for effective work.

After a coffee break, we had a go at this business. It had sounded quite easy to do when Lynn explained it earlier. In practice, of course, it wasn't easy at all. Try to summarise the main points of an A4 page magazine article in 1.5 minutes, never having seen the article before! (The time limit reflects the amount of time a working indexer can afford to spend absorbing the article.) Then turn that into an abstract. It's clearly possible in the time, once one has experience at it, and we had some success in capturing the essence of the text at first attempt.

Then Lynn handed out appropriate thesauri and we searched them for keywords that would describe the article.

For an editor who has not seen this kind of thesaurus before, this was less straightforward than preparing the abstract. Thesauri have been compiled and published particularly for database indexing, and they focus on special subject areas, such as public affairs, water, criminal justice. The intention is that all indexers will use only particular keywords to describe the information in their sources, and so simplify the subsequent retrieval of that information from the database. However, the keywords we first searched for were generally not in the thesauri, and a flexible brain was required to think of synonyms that might be findable.

I enjoyed this workshop very much and it stimulated me to try out Streamline and other databases, and to want to pick up this skill professionally.

By the way, I've found a terrific list of databases at [www.csu.edu.au/division/library/eresource/data5.htm](http://www.csu.edu.au/division/library/eresource/data5.htm) (though you have to be part of Charles Sturt University to use the links).

*Ann Milligan,  
Science Text Processors Canberra*

\*APAIS is Australian Public Affairs Information Service (now part of APAFT – Australian Public Affairs Full Text), and NCJRS is National Criminal Justice Reference System.

## Workshop 2: Software for back-of-book indexing

This workshop consisted of presentations of the three computer indexing programs by their promoters, Sky Index (Michael Wyatt), CINDEX (Frances Lennie) and Macrex (Max McMaster).

Michael began with a detailed examination of Sky Index, the most recently developed. He showed us Version 6, which is expected to be available later in the year at a cost of approximately \$A1000. Version 5.1 is the latest currently available, can be ordered online, and a free demonstration version downloaded. Sky is easy to use, can do most indexing tasks and handle most types of material. It has efficient data entry, as you can edit the records as you see them, and they are in the correct index order all the time. One part of the screen shows the alphabetical order and the other is the working area, with entries, up to 3 levels, in 3 columns, being added. Sky has an auto-complete feature, and will try to guess at a heading once a few letters are keyed in. (CINDEX also has this.) It will drag and drop a record (pick it up and move it somewhere else), mark and hide records if required, expand pagination or abbreviations, change cross-references to double-postings, and show the last index done. The main difference between Sky and CININDEX is the data entry/edit interface: Sky uses a spreadsheet-style grid, and CININDEX an index-card metaphor.

I have gone into a lot of detail about Sky, as the other two presenters compared their products to it, and showed the differences and similarities.

Frances spoke on CININDEX, the program her firm, Indexing Research created 15 years ago, which is now produced in several different editions (for Windows and Macintosh platforms) and costs about \$A1000. With CININDEX you can have more than one index on the screen at one time, and drag records or their elements from one to another, which is good for consistency, e.g. in journal indexing. You can file in chronological order, mark records new or altered in the current session, set the number of fields from 2 to 15, and search on keywords. CININDEX has the ability to flip records that Sky has, and uses brackets to affect sorting, if needed. While you're working, CININDEX won't automatically change any errors you

introduce but will alert you to possible problems. It will also jump you to the point where you want to add an entry or let you see your most recently entered records in the order you enter them. Its spellcheck dictionaries can be customised to US or UK spelling, and it can produce camera-ready indexes, though the final index is usually emailed to clients.

Please note that the prices for Sky and CININDEX are only approximate, as they are set in US dollars, and the Australian price will vary as the value of the Australian dollar varies.

Max demonstrated the Macrex program, designed for a PC, but able to work on a Macintosh with Windows 95, 98 or 2000. It is a UK package, whereas Sky and CININDEX are US ones, currently up to Version 7, available at \$A725 to members of the Societies of Indexers and Editors, or at \$A250 if upgrading. Macrex is more primitive than either Sky or CININDEX because even though it operates through Windows, it still has the DOS-feel which reflects its origins. The other two were designed as full Windows versions. Although Macrex lacks some of the features of the other two, it has some which the others are only now trying to copy. With it you can select a term from the screen, add it to the bottom working area, and it will file correctly. It has flip functions, but not the preposition feature that Sky has, and its see also references are in a different colour. An introductory screen shows the major features, for instance a search and replace facility. You can do a combined author, title and subject index, separate this into three, identifying each element by code, and the program will drop them in their correct place as you add them. Layout and format can be varied, as well as methods of sorting. A web address [www.macrex.co](http://www.macrex.co) will show you a demonstration version.

All three programs are extremely useful for indexers, and as Frances Lennie said 'The program you choose depends on the way you prefer to work'.

*Edyth Binkowski,  
Australian Society of Indexers  
(ACT Branch)*

## Workshop 4: Literary Editing

This workshop was conducted by Pamela Hewitt and Susan Hampton, both of whom are writers and editors. They hope to have a website ready later in the year, which will include writing and editing courses and services (foxediting.com).

Many in the group had some kind of training in communications, and editing experience, mainly in non-fiction.

Literary editing was described as the editing of fiction, i.e. novels, short stories, poetry, plays, and some books with a stylistic thrust which makes them literature, for instance Janet Malcolm's editing of Freud's letters, and Manning Clark's work, which has passion but does not always produce a narrative.

When editing non-fiction, you aim for consistency and clarity. When editing fiction, you try to bring out the author's voice and characters. No matter how important a writer is, an editor can improve the writing, though may have to justify what was done.

We were then given a several examples of work to edit, beginning with a sentence, and ending with a page. The main points we learned were:

- deletion of unnecessary words, often the first and last word, phrase or sentence
- maintenance of sentence rhythm

- changes in sentence sequence, or even paragraph and chapter sequence, can improve the work
- particularly in poetry, it is important to notice the difference between labelling and evoking, and not to say what you really want to say but evoke it.

This last point is structural editing, leaving out detail so the reader will have to infer it, making the difference between and active and a passive reader.

Susan Hampton showed how she had edited a poem, changing the word order, taking out some details, omitting some punctuation, to make a more concise whole.

There are always reasons to ignore the above advice and leave the work as originally written, for instance if repetition has been used with good effect.

We were given a list of common literary edits, many of which had been mentioned above, but also including removal of jargon, grammatical and punctuation errors, and repetitive sentence openings. Above all, change written dialogue to sound like what is spoken, and edit for clean text and flow.

*Edyth Binkowski,  
Australian Society of Indexers  
(ACT Branch)*

## Workshop 5: Multiple Index Publications: some case studies

This workshop, presented by David K. Ream of Leverage Technologies Inc, Cleveland, Ohio USA, described and compared five different models for gathering data for and generating multiple indexes to publications.

The focus was on recurring publishing situations involving larger reference works, not on standalone indexes as in back-of-book indexing. These recurring publications can be abstracts, directories, reports, e.g. newsletters, debates, e.g. Hansard and websites of articles. The citations include article titles, article numbers, page numbers and weblinks. The technology to produce these multiple indexes includes database software, SGML, dedicated indexing software such as Cindex, composition software and HTML.

The use of technology has allowed indexers to produce multiple indexes quickly and accurately with an enormous saving of time and person dollars.

*The Philosopher's Index* is an international index to philosophical periodicals and books and is published quarterly. The index is published in print and now through Silver Platter on CD-ROM. This is a large database and includes a subject index: main heading, citations, abstracts and some *see* and *see also* references; an author index: name, citation, and abstract but no cross-referencing; and a book review index not tied to the subject and author indexes and which includes author and citation details and where the book has been reviewed. This index is produced using database

software and interestingly does not include page numbers.

*The Courts Directory: BNA's Directory of State and Federal Courts, Judges and Clerks* is published in print annually and on the web monthly. The indexes produced are a federal courts index, state courts index, geographical federal index, county/city index and a name index. Database software and Cindex indexing software are used to produce this index.

There are various legal and business reports one of which is *The Tax Management Weekly Report*. This report is published bi-weekly and cumulative indexes are published quarterly in print and monthly on the web. The data files include

topics, cases and tax regulations and this index is produced using SGML and Cindex indexing software.

*The Hansard Assembly Debates* is published at the end of the assembly session and two separate indexes are produced from one database of information: a subject index and a speaker index.

*The Case in Point Index* is to case studies, reports, and a newsletter, all on consumer and business information. Only the previous year's content is provided on the website but a cumulative file is kept on an intranet.

*Shirley Campbell*

## Workshop 6: Editing for the corporate client

Patricia Hoyle from Patricia Hoyle and Associates led the 'Editing for the corporate client' workshop, where the focus was on marketing editorial services to business and government sectors.

Patricia's expertise is enhancing the effectiveness of written communication in the workplace so as to promote efficiency, productivity, quality, and a striking public image for a business or government department. She offers professional consultation in writing, editing, and proofreading, and conducts business writing workshops. She has worked for the health, insurance, finance, manufacturing, retail and maritime industries; trade unions; small businesses and local, state and federal government organisations.

The question 'What is marketing?' was posed by Patricia. It is not about advertising or the 'hard sell'. Hard selling to potential or existing customers can make you look like a pest rather than a help to an organisation. Marketing is about building relationships. This is achieved by networking with people in professional associations and in the workplace. See yourself as a resource and a partner rather than a vendor. Marketing is about defining for yourself and for others what is unique about the services you offer. It is also about explaining to others the importance of and need for the work we do.

Learn how to ask questions of the client about what they really need: 'If your customers were holding this document in their hands, what would you like them to

do with it?' These sorts of questions will help you and your client analyse and determine who is the target audience for the document and the proposed use for the document. 'Listen to your client,' stresses Patricia. 'You won't learn anything if you don't stop talking!'

'When you quote on a job, follow up with a phone call after a reasonable period.' A story was told about one consultant whom Patricia thought could be a future, useful resource for her organisation, but who was inappropriate for the current job on offer. When Patricia told the consultant that her initial quote was unsuccessful, the woman responded with such poor grace that Hoyle decided she was not an appropriate resource for future use, after all. The moral of the story: accept 'no' graciously; stay in occasional contact with a potential client, and you may be contracted at a later date.

Patricia also stressed the need for editors to make the pie bigger for everyone. Don't be reticent about cross-networking with 'competitors'. If you don't have the time to do a job, or the job is inappropriate for your skills and knowledge base, help your client by recommending others.

The workshop contained role plays for participants, who played editors, indexers, or clients. The purpose of the role plays was to highlight the sorts of issues that need to be discussed when quoting, and what to do when the client changes the parameters part-way through the job. Body language and the issues of personal contact

and trust were also explored in a game and its follow-up discussion.

Among a number of other pieces of advice offered by Patricia were the golden rules of treating people the way you would like to be treated and never underestimating your value or worth.

At the conclusion of the two-hour workshop, Patricia Hoyle gave generously of her time – another hour – to answer participants' questions on a one-to-one basis.

*Ann M. Philpott, Freelance editor,  
indexer, writer, proofreader*

## Workshop 7: Editing for Indexers

The Workshop by Claudia Marchesi had ten participants, all of whom had at least a general familiarity with the publishing process. Topics covered were within copy editing and proofreading.

Copy editing (i) improves the text rather than rewrites it. The author's 'voice' must come through. The editing corrects errors of grammar, syntax, spelling, punctuation and ensures that the intention and meaning are clearly expressed; (ii) ensures that style (house style or style developed for the work in hand) is consistent; (iii) ensures that references and bibliography are complete and layout and format conform to style; (iv) oversees proofreading and consequent amendments.

Proofreading (i) corrects spelling, punctuation and typographical errors; (ii) ensures that cross-references are complete; (iii) ensures that style and format are consistently applied.

There was discussion of some examples of usage and style and of some Microsoft Word devices which help editors especially in keeping track of changes when editing on disk or on-line. Probably the most useful part of the workshop was the description of a number of tools which are important

for Australian editors and proofreaders. Some of these are listed below. The handouts included a breakdown of copy editing tasks, a sheet of examples of proofreading marks and a brief proofreading aptitude test.

### Bibliography

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- Weber, Jean Hollis. *Electronic Editing*. Accessible on [www.wrevenge.com.au](http://www.wrevenge.com.au)

*John E. Simkin*

## Workshop 8: Indexing for Editors

Max McMaster gave a thorough and helpful description of the 'nuts and bolts' of indexing in the Indexing for Editors workshop on the Monday of our conference. A panel of three took us through three software packages in the afternoon, especially relating to sorting and layout. The presentations essentially dealt with lists of 'names' – of people, places and ideas. Whether or not we are now tempted to make an index ourselves, these sessions would help us to assess those provided to us for editing.

I was also hoping for discussion, or at least a reference to follow up, on what I call 'conceptual indexing' – thinking about how to categorise sections of text beyond the actual words used. I can generate some ideas of how to do that, but was keen to not only reinvent the wheel. I didn't get that in the talk, and would welcome any information on this readers could pass on to me.

Just as editors say that nobody should do the final edit on their own work, indexers are adamant that dedicated software should be used for editing. This was convincing for those doing many indexes, but it seems to me that the software is particularly useful for indexing done after a manuscript is completed with only occasional page number changes to follow. For a writer doing an occasional index, the benefits of automatic linking of inserted index tags to page numbers in word processors would be great.

It would have been even better to have the 'how to' workshops on before the conference rather than after, because it would have enriched my understanding of the conference sessions to have had a better understanding of what indexers do.

I am indebted to artsACT for their financial support for me to attend the conference and workshops.

*Alexa McLaughlin*

# Hypothetical scenarios on ethics

presented by Basil Walby, Society of Editors, Victoria, devised by Pamela Hewitt, Canberra Society of Editors

## 1

You are asked to edit a postgraduate thesis and you establish that this will be done in accordance with the ethical guidelines of the university concerned (acknowledgement of the role of the editor, knowledge and consent of the supervisor). When you begin the task, you realise that there are major conceptual problems with the thesis draft. It is not simply a question of language style and grammar. You have a background in the discipline concerned and know that you could assist the student with more than your copy editing skills.

How do you handle the situation?

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## 2

You are asked to revise the index of a publication for a second edition. You did not compile the first index and are concerned about the ethical issues involved. Does the original indexer have intellectual rights over the content of their earlier index? Are you benefiting from their work without acknowledgment (or payment) if you use the first index as a 'shell'?

## 3

You have compiled a book index when the client makes substantial last minute revisions to the final typeset manuscript. Tables are placed on different pages, whole sections are deleted and others inserted. Virtually every page is affected. You advise that the index must be started from scratch. The client is not prepared to pay for the time involved and asks you merely to index the new sections and make whatever changes are possible for a specified cost.

Do you reject these new terms, even if it is made clear to you that refusal means no further work from this client?

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## 4

You are asked to edit (or index) a manuscript on a subject in which you have a strong background. In the course of the job, it becomes clear to you that much of the material that is being presented as the original work of the author is in fact plagiarised.

What steps do you take?

# QUOTING: Introduction and hypothetical scenarios

Janet Salisbury, Biotext, Canberra

## How to take the mystery out of your income projections

IMPORTANT NOTE: These figures are totally hypothetical! The message is that you can plug in the figures from your own business arrangements and come up with an answer — you do not have to go on 'gossip', 'hearsay' or 'rumour' to work out your hourly rate!

Step 1: How much do you want to earn?

### Example:

Net income required	\$40,000
Add:	
– Expenses (see below)	\$16,000
– Superannuation	\$6,000 (15%)

Gross business income required  
\$62,000

## Step 2: How will you earn it?

Hours per week	37
Weeks per year	46
Hours worked per year	1702
'Productive hours' (@75%)	1276

Hourly rate to produce gross business income of \$62,000 **\$48.50**

## Freelance expenses

### How much do you need to spend to earn?

The 'basics' are as follows:

#### Office

Rent or home expenses \$2000

#### Communications

Tel/Fax/Internet \$2750

#### Insurance

Public liability	200
Income protection	800
Office equipment	200
Life	250
Professional indemnity	1800
Worker's comp (WC)	n/a *
TOTAL	\$3250

\*Note: this is not applicable for sole traders but if it is needed for subcontractors or employees. WC insurance is quite expensive)

#### Memberships/

Professional development \$1000

#### Stationery/printing/software

\$3000

Postage/courier \$500

Computers/printer \$2000

#### Other

Legal, advertising,  
Financial advice, etc) \$1000

**Total** \$16,000

(NB These estimates are generally conservative and do not include car or other travel expenses)

## Factors that affect costings

Is a draft available for inspection before quoting?

How many pages is it?

Are changes required on hard copy or electronically?

Is the job 'easy' or 'hard'? (e.g. is it in simple language or is it very technical and almost like another language?)

Does it need a complete rewrite or a light copyedit?

How much responsibility do you have for the content?

Will you be responsible for all stages of editing and proofing?

Will you also be responsible for the formatting/design work (i.e. will you provide camera-ready copy)?

Does it have a reasonable time frame or will it involve working all night or all weekend to finish on time?

Will you have much direct contact with authors?

Are you required to attend meetings/teleconferences?

Will you have a contract, or is it an informal arrangement?

If it is a contract, will you have the ability to vary the contract conditions if circumstances change?

# Quoting: the hypothetical scenarios

## Scenario 1

The publications manager of a large organisation approaches your business and asks you to quote for editing a publication in Word. You have done a couple of editing jobs for this client before and would like to do to do more work for this organisation.

The publications manager tells you that the draft is 80 pages of A4 and has no illustrations. He says it needs 'a fairly thorough going over'—they want the final product to be easily understandable by a general audience. He says they have chosen you because they remember what a good job you did last time. The text will be supplied on disk and the publication will be printed from the formatted Word file. Because they have a launch planned, the deadline is very tight—the job will be delivered to you in the morning of Monday 1st and must be completed by Friday 5th.

You are just finishing your current job and your next job (a large one) is not due until Monday 8th. In your business, you usually do the editing and you have assistants to help with formatting and proofreading.

Previous work from this client has been quite straightforward with a simple layout in one colour. You ask to see a draft of the document but it is not ready yet.

How would you approach this request for a quote?

Would you request any extra information?

How would you structure your charges?

Would you specify any conditions or job parameters?

## Scenario 1—Later

You email your quote and a few days later you hear that your quote is accepted.

On Monday the manager tells you that they will send you the text the next day. Late Tuesday afternoon the job arrives. It is 120 pages long and contains eight very poor quality Excel graphs. The text is hopelessly disorganised and poorly written. A note tells you that the layout must match the accompanying published B5 book—a smart-looking publication with two colours, running heads, part-titles. The document is in Word (with the graphs embedded) but the template is not supplied. You ring the

publications manager but no-one answers (it is after 5 pm).

## What do you do?

**A** Do you start on the job anyway, realising that if you don't start you won't get it done before it clashes with your next job?

**B** Wait until the next morning, when you ring the publications manager?

**C** Decide not to do the job as it bears very little resemblance to the information you were given?

Why do you take your chosen approach?

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## Scenario 2

A project officer in a research organisation approaches your business and asks you to quote for editing and producing the proceedings of a two-day workshop. You have been very highly recommended because of some other (very technical) editing that you have done for another section of the organisation. The workshop is on a similar very technical issue but the client says that they only want 'basic' editing of the papers.

In your discussions with the client you realise that they do not know much about what is involved in producing the proceedings. You have a great deal of experience of exactly this type of work and this subject area and you are able to talk them through what is involved. They ask you to put a formal quote on paper.

How would you approach this request for a quote?

Would you request any extra information?

How would you structure your charges?

Would you specify any conditions or job parameters?

## Scenario 2—Later

When you send in your quote, the client is a little surprised by your budget — they hadn't expected it to be so much. However, after a couple of days you get a phone call to say they want to go ahead and can the project officer come round for a meeting and to give you the first papers.

You have the meeting at the end of which the project officer drops into the

conversation that he will have to firm up a contract with his finance department. Later that day he phones to say he has been advised that they need to get a couple of other quotes—but not to worry, it's only a formality. They do not ask you to requote and do not send you a copy of the brief they send to the other contractors. A couple of days later you get an email saying '...regret to inform you but on this occasion your quote has not been successful...'

### What do you do?

- A** Nothing—the bad feeling that making a fuss would cause would not be worth it?
- B** Phone up and ask (a) to see the brief that was sent to the other contractors and (b) for more details on why you did not get the job?
- C** Sue them for breach of contract?

Why do you take your chosen approach?

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### Scenario 3

You are a freelance editor in your own one-person business. A junior publications officer in a publishing company has been asked to find an editor to 'proofread' a 100-page book on the history of medical imaging. She finds your name in the Editors Society freelance register and asks you to quote for proofreading the publication. She says you will receive a draft electronically and should enter your corrections with revision marks and return to the publisher by Friday week so they can check and accept the revisions before sending the book to the designer.

She sends you ten pages of the draft document as a sample. The text is clear and well-written, and flows in a logical order. You are pleasantly surprised to find that it is moderately interesting. There are only six typos.

You are suspicious about the 'proofreading' bit so you contact the publisher to find out more information, only to discover that she does not know much about the publication or its background except that the draft copy is ready to be proofread. She has been told to 'find someone to proofread this book' by her boss, who is on a week's leave. She would like the quote by close of business on Friday (today is Wednesday) so that her boss can

look at the quotes 'first thing Monday morning'.

How would you approach this request for a quote?

How would you structure your charges?

Would you specify any conditions or job parameters?

### Scenario 3—Later

You send your quote—not for proofreading as requested, but for a light copyedit. Experience has taught you that most people use the term 'proofreading' when they mean 'a light edit' (or even a substantive edit!).

A week later the publications officer tells you that her boss has chosen you to do the job. The electronic copy is sent to you the next day. You also find out the book was drafted over a year ago, and the authors (there are several) are busy people, mainly academics, who are hard to contact. They work in different parts of the country.

You start the job. The first chapter (most of which you have already seen) meets your expectations, except for three references that are either missing from the list of references or seem to be incorrect.

You soon realise that the document has what seem like thousands of references—and all are either missing, apparently incorrect or linked to the wrong text.

### What do you do?

**A** Do you continue the job, ignoring the references and intending to bring them to the publisher's notice in a general way when you give her the completed job?

**B** You contact the publisher, who tells you that she has no information on the references. You decide to negotiate—what?

Why do you take your chosen approach?

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### Scenario 4

A government department invites you to submit an application to be included on a register of preferred editors for future editing of a series of technical publications. Successful suppliers will be offered a 'standing contract', which will be effective for a two-year period.

You will be required to edit, format and proof the reports and supply them in ready-to-print form and also either as PDF or

HTML files for Internet publishing. The reports vary in quality; some only require a 'light copyedit' and some require substantive editing. Some in-house style notes are provided but they are very sketchy.

There are a number of selection criteria to be addressed:

- demonstrated experience;
- evidence of qualifications relevant to editing technical documents;
- ability to meet very tight deadlines;
- ability to provide information in ready-to-print form in Microsoft Word and also in a suitable Internet format; and
- value for money.

You are also required to include a breakdown of your charges, based on either copyediting or substantive editing of various-sized documents (e.g. 20, 30, 40, 50... 80 pages), within either a 'short' (under two weeks) or 'standard' (two to four weeks) timeframe.

A couple of previous reports in the series are sent to you for information. They are written to a standard 'formula' but each has a number of complex tables and they are heavily referenced in Vancouver style. How would you approach this application?

Would you request any extra information? How would you structure your charges?

### **Scenario 4—Later**

Some weeks later, you are pleased to be notified that you have been selected to be on the register. However, when you receive the deed of contract you find there is a clause requiring that you must have a current policy for \$1 million professional indemnity insurance cover. You do not have professional indemnity insurance.

The contract also has an 'indemnity clause' that implies that if you do not have cover you may be personally liable if something goes wrong.

### **What do you do?**

**A** Sign the contract anyway and don't mention that you do not have the cover.

**B** Contact the department and try and negotiate to have either the insurance clause or the indemnity clause changed/deleted.

**C** Get professional indemnity insurance.

Why did you decide to take the steps you did?

## **Hypothetical scenarios on taxation**

Devised by Pamela Hewitt, CSE and presented by Madeleine Davis, AusSI

### **1**

Your business has an ABN and is registered for GST. You invoice a client in the normal way but they pay only the amount you charged for your services, not the GST component.

In your BAS, do you list this item as a non-GST item?

Under what circumstances is your client legally justified in not paying you the GST component?

### **2**

Your business is currently registered for GST. Around half of your work (indexing and/or editing) is for private clients who are end users and so cannot claim GST inputs. These clients pay 10% less if they use the services of your competitors who do not meet the \$50,000 pa threshold and therefore do not charge GST.

The other side of your business is for large government and corporate clients who expect you to be GST registered. In fact they would regard you as a less than serious contender for tenders if you didn't charge GST.

Your turnover is close to \$50,000 pa. It would be a simple matter for you to expand or contract your business a little so that you were just over or just under the cut-off point.

What should you do? In making this decision you want to make a good business move and one that is professionally satisfying.

### **3**

You have a client who is a Korean national resident in New York. All work is carried out via email correspondence. Should you charge her GST? Under what circumstances is GST payable on exports?