

## How do I index thee? Indexers count the ways Part II

By Kari Kells

In the first part of this article (which appeared in the April-June 2004 issue of this bulletin), *Janet Perlman, Cathy Martz, Sherry Smith*, and I shared our indexing processes with you. In the interest of presenting a varied landscape, a few more indexers here go on-record with their processes.

### **Cheryl Landes**

*Cheryl Landes started indexing in 1991. Her topic specialties include computer software, programming and engineering manuals, travel, history, transportation, occupational health and safety, environmental issues, children's books, and cookbooks.*

My indexing methods are all over the place, varying project-by-project. Following are some factors that impact my processes.

### **Embedded indexes**

In these cases, I read the text online and insert the entries directly into the files as I go. When I first used embedded indexing tools, I would print out the manuscript, mark it up and then go back to the electronic files to insert my mark-ups. Once I became accustomed to the programs with embedded indexing features, it became easier and faster for me to do everything online.

### **Subject matter**

Some subjects are easier to index than others. Subjects in which I have a background are easier to index than those that I'm not as familiar with. Some publishers will give me subjects I've never indexed before. It's interesting to read the material and learn something new. It's easier for me to mark-up unfamiliar material on paper and then enter the information into an indexing program. If it is familiar and well-written (see next point below), then I'll type in the entries as I'm reading through the text. Otherwise, I'll

mark-up the text first and then type in the information.

### **Quality of the content**

Well-written manuscripts are *much* easier to index than those that aren't. I've noticed over the years that authors who are very good writers also know how to organize their thoughts and material well in a manuscript. When I receive a book that's well-written, I generally read the book and type in the entries as I go, without marking the pages. If the concepts are hard to decipher, then I'll read through the book and mark-up the manuscript before attempting to enter anything on the computer.

### **Location, location, location**

Often I've been working while I'm traveling. If I'm on a plane, I will mark-up whatever manuscript I'm assigned. It's hard to type in entries on a laptop on a plane because of the cramped surroundings, so marking the manuscript gives me a head start until I can settle in a place where there's more room to work. On the train, there's more room to spread out, so I work with the computer there.

### **Editing**

Most of my time is spent editing – the ratio is around 70:30 (70% of the time spent editing; 30% spent analyzing text and creating entries). I will try to edit as much as possible as I go through the text and then have a final pass at the end in MACREX™.

If I'm creating an embedded index, I'll usually create the entries for a chapter or section, compile the index, and edit. I keep doing this until I've reached the end of the document and then do a final edit pass. There are a couple of exceptions to this process because of client requirements. In those cases, I embed the entries; then the publisher compiles the index and gives it back to me to edit.

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**Kari Kells** was a founding member of the Pacific Northwest chapter of ASI, and has served that chapter as Webmistress, Vice-President, President, Newsletter Coordinator, Directory Coordinator and on numerous committees. She has served ASI as one of the original web site co-authors/Webmistresses and on the Web committee. Kells teaches indexing through her business IndexWest, the USDA Graduate School Correspondence Program, and in universities throughout the Pacific Northwest. For more information about her background and indexing services, visit her web site at [www.indexw.com](http://www.indexw.com).

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### **Kathy Sychra**

*Kathy Sychra has been indexing for three years, primarily in religion and education.*

Regardless of the type of book, I follow the same steps. I skim through the entire book and make up a mini-index (metatopics). That helps me stay focused through the marking up stage.

Then I mark up the hard copy. At the end of a chapter, or after marking up 20-30 pages, I do the data entry in SKY Index™. I immediately run a proofing report, and proofread what I have just done. Generating Proofing Reports is one of my favorite SKY Index™ features, although I assume other programs have something similar. I find that the proofing report step insures correct spelling and accurate reference locators as I go along. If there are corrections, I try to make them right away, so I'm finished with that section.

When I'm about a third of the way through a text, I print the index in indented format so I can see how it is shaping up. I make notations and suggestions, but I don't really do any editing. I print another index about two-thirds of the way through, and make more notes.

When all my data entry is complete, and

everything is in the index, I start editing. I first go back over my notes on each of these hard copies and start making the noted changes in my SKY file. Then I deal with all the entries that have questions – how to word an entry, whether a cross-reference is needed, pages I just didn't know what to do with, that sort of thing. Then it's just going through the standard steps of editing an index. Editing is fairly time-consuming and takes about 30-35% of my time for any given project.

Finally I run the SKY function that checks for errors in indexing, then run a spell check (though I try to check spelling very carefully each time I do a proofing report).

I let the finished index sit overnight and give it one more pass the next day, before sending it off.



## Seth Maislin

*Seth Maislin is an indexing and information architecture instructor and mentor. His biggest success to date has been convincing his mother-in-law that indexing is really, really cool.*

When writing a standalone back-of-the-book index, I often receive electronic files, which I print. Now armed with hard copy, a clipboard, and any handy pen or pencil, I start circling ideas that I consider indexable. In many cases I add notes in the margins (or on top of the text itself) that suggest terminology I might consider when writing the entries. After each chapter, or for a short book the entire text, I return through the marked-up pages and begin typing entries into my indexing application. Finally, I review, edit, and improve the index, referring to the text as needed: paging through print versions when reconsidering my choices, or searching electronic versions to resolve vocabulary control issues.

For embedded indexing projects, I rarely print the electronic files. Instead, after a quick review on the screen, I begin the indexing process from the first page. For some clients, I am obligated to return an indexed chapter quickly, often before other chapters are available to me. As I continue indexing, therefore, and I find myself wanting to edit previous chapters, I make several notes to

myself. These notes might be written as an email message that I send myself; other times I access the already-submitted chapters and make corrections using colored text. Eventually, after all chapters have been indexed once, I may have access to a compiled index. I use my notes and the colored text to identify my desired changes and update the final index, before I begin the full editing process. If my client will compile and produce a final index, I will also provide (for additional fees) an incredibly thorough, itemized list of all index edits, ordered either by chapter (if they'll make changes to the index data) or alphabetically (if they'll change only the compiled index).

In both cases, editing usually takes about 40% of the total project time. The reason for this is I prefer to spend time away from the text. That is, I try to be thorough with the hard copy or electronic files so I don't need to continuously refer to them. I find that I can avoid continuously referring to the text if I try to capture every indexable idea up front and worry about organization, alternative access points, and language later. Therefore, I spend the majority of my time working with the compiled index.

## Cher Paul

First, there are a few details that color my process. I provide editing services, as well as indexing, so I switch among different processes throughout any given workweek. Because an indexer's eye sees very differently from an editor's eye, I am more methodical as I approach each task. Because I prefer to immerse myself in the material, I prefer to stay with one job for at least several days at a time. On a practical level, pages often flow from the compositor in fits and starts, and I am finished with one set of pages days before the next arrives. In this case, immersion is tossed out the window and I'm just groping for continuity.

To address both these situations – my several work processes and immersion/continuity – I sometimes create a detailed table of contents for projects. I frequently did this when I started indexing and was surprised how often I referred to it. I mostly do it now for projects that flow in fits and starts. I also use yellow stickies to mark chapter openers. I write page numbers in the upper right in a bold color, and highlight in-text name citations (for name indexes) in yellow.

After that, I suspect that my process is like many other indexers' processes. In textbooks (which is mostly what I index), section and chapter headings include indexable terms and concepts, key terms are bolded, and terms are often pulled into marginal notes with their definitions. Those features make indexing terms jump out at me. Because I'm thinking as I'm marking pages, rather than merely in-the-eyes-and-out-the-fingers typing, I'll (a) think of other terms not used in the text, and (b) begin to see whatever structure might underlie the discussion. Of course, I must still weave the structure. The author's skill – or lack thereof – and how much editorial attention the manuscript received will determine how difficult this is.

## Weaving

As I mark pages and enter terms, I make notes, draw pictures, question connections between concepts, and compile lists. Illustrations are *very* helpful to me, so I sometimes draw trees, Venn diagrams, or connected bubbles to help fix in my mind connections between concepts. Translating those connections into cross-references is relatively simple, but I don't make the translations until the major editing pass. I edit a little bit as I initially add entries into my software – I may stop every few chapters to clean up little things – but not so much that I lose momentum. For things I must come back to (missing data, for example) I may include “???” or “XXX” in the entry. I remove these as they are resolved, and search for them late in the process to be sure they're all gone.

With *textbooks*, I mark several chapters, and then enter my terms into my software. How this moves back and forth varies a lot.

In higher level books, *scholarly books*, or other books that are more narrative and less broken up with the crutches and cues common for undergraduate readers, I underline and make detailed notes. I will often read the material twice and skim sections as needed. What is written on the pages is pretty close to my initial entry. I mark much more of the text before I enter anything into my software.

After initial entry is complete, I prefer to walk away from a project for a day. If it has been a full-out, total-immersion, overtime experience, I'll probably do something very different on my day off, something physical and brainless that isn't mentally taxing (yard

# Indexer Work Methods

work, cleaning the house, hiking). I like to work up a sweat, get winded, and go to bed with a tired body as opposed to a tired mind. Wouldn't that be nice? More often, I take a good long walk, and then work on another project.

I figure on spending about 50% of my time editing; sometimes it's less, but it's never been more. For me, editing begins in earnest with a line-by-line read, during which I add to or amend my notes, pictures, and lists. Somehow, this read is never completed; its purpose seems to be to get me into Edit Mode. Where I start editing varies; often cleaning up small, discrete issues is the place to start, but sometimes it is more helpful to resolve larger structural issues first. Often I Find and Group on a particular term, print the results, decide how to handle the issue, then make the changes. By the time all the items I listed, noted, or drew are finished, I have read the entire index. And I have used every error check mechanism the software provides. With luck, the index has had an external review via a peer review group or IndexPeers; these generally provide a few forehead-slapping moments and elicit much gratitude.

After another break, the final edit is a line-by-line read of the entire index. This is cleanup, and there's not much of it. I'm usually pretty happy by now.

A note on **accuracy**: Typing numbers keeps me very alert because I expect to make mistakes. I use the feature that starts each new entry with the locator of the previous entry, and have trained myself to move my right hand to the number keys whenever my left hand turns the page, then look from page to screen to double-check the new locator. I spot-check every chapter or two. During editing, I am in and out of the manuscript and spot-check locators all the while, as well as checking locators after resolving each question.

## Conclusion

Once again, reading summaries of the main steps involved in processes isn't nearly as revealing as seeing details contained in the layers of steps.

Compare the processes described by *Kathy*

*Sybra* and *Seth Maislin* to see examples of this: Both mark up hard copy of texts, and both work chapter-by-chapter. However, *Kathy* generates and reviews proofing reports after each chapter, a unique step which none of the other contributors mention.

One huge benefit of looking at a variety of methods employed by indexers is that we have concrete illustrations showing that the logistics of how one goes about indexing isn't nearly as prescriptive as new indexers might first think. Rather, it is how one makes decisions about selecting access points, writing phrases, and creating structures – the creative, subjective processes involved in writing indexes – that is *most* important to the learning process.

Since I began the first part of this article with a selfish note, I'll end with one. I was fascinated by how differently each one of us approaches editing our indexes. Some interesting activities are described by these eight indexers. I'm anxious to try a few of those on for size, to add them to my own editing process to see if any of them feel comfortable to me.

I look forward to hearing and reading about other indexers' processes and getting an even more widespread look at the variety of processes we follow in order to reach our common goal: creating indexes that are useful to as many readers as possible in the target audience for whatever text is in-hand.

*Editor's Note: In September 2003, in response to Kari's initial posting about this topic on the indexstudents list (www.indexstudents.com), I summarized my process in comparison with hers and noted that my first step was similar to hers, of which she said, "I browse through the text, reading the table of contents, chapter headings, sections within chapters, and looking at illustrations."*


*Ditto! Plus, as I do this – and I believe it's called "vetting" – I also mark page ranges for discussions that go over one page (an arrow to show if it's just to the next page, and with the ending page if it's more than that), and I jot down in the margins next to their citations in the text the page numbers of figures, tables, boxes, or other non-text items.*

*But in comparison to Kari's second step ("I index section headings, inputting them into my indexing software"), my process begins to differ as here I simply **input the index**:*

*Not quite – after having browsed and done that preliminary read-through, I then sit down and input the index at the computer. It's amazing how much goes in my head, I guess, when I did that first pass. But by the end of it, hopefully the entire book if it's <500pp (otherwise I take the biggest chunks I can for larger projects), I usually have a good idea of what's going on in the book. Maybe my first reading is a little more detailed than Kari's (it also depends on the type of text and how much attention is required).*

*That is, I skip her third step, and mush together her second and fourth ("I input the highlighted terms and marginal scribbles into my indexing software"). And **editing**, Kari's fifth step ("After all the terms are in my software, I edit the index"), is my third step:*

*I do this at the computer. Sometimes I'll stop inputting and revise a section as I get into material more. Either way, I also do at least 1-2 (or 3 or 4 or more) passes after inputting everything. One pass may include spell checking, for example, or verifying cross-references, or working on certain concepts, etc. But there's always one final go-through of the whole sucker, too.*

*As Kari noted, she then sends the finished index to the client. This too is my last (and fourth) step. In summary, I vet the text, input my index directly from the text, and then edit my index. *

## Key Words

### In future issues of Key Words

- Indexing Chinese Names
- Indexing Guides to Recorded Classical Music
- Indexing Spanish Names