

Melbourne Indexers Bulletin

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July meeting:

Improving your indexing speed

There are many aspects to how you can improve your indexing speed efficiently. The aim of this session was to examine the range of things that contribute to how you can improve your indexing. We all work and index in different ways. There is no 'correct' way. You need to determine what works best for you. Be open to ways of improving and give them a try. Some will work for you, others will not. Adapting to change can take time. Allow yourself time to investigate new approaches fully before you knock them back. Working efficiently is about reducing the possibility of errors. All jobs are likely to stretch you in some way. With the right tools and experience these can be reduced or worked through.

The basic question is if you are asked to index a book for a fixed price, can you index it efficiently for that price? The following are points discussed at the meeting.

Tools for the job

Like any profession you need the right tools to perform the job. For indexes the 'tools' include a lot of skills and expertise such as the following:

1. Know the subject
If you are familiar with the subject, you are very familiar with the terms to be included in the index and what readers in that subject will be looking for in the index. With time you will be almost skim reading and cherry picking the terms from the text.
2. Know how to index that subject
If you continually index a particular subject or style of book you develop a set of index terms and subheadings appropriate for that subject. As you acquaint yourself with the terminology used in the text you'll know what cross references are appropriate to use. For example, indexing a biography you can predict the sort of life stage subheadings that may come up, and you'll know that you may have to handle changes to surnames and extended family members, possibly with the same name.
3. Know how to produce the type of index required

For example, can you embed the index into Word as requested? Are you confident to index an annual report? Are you familiar with preparing a separate list of cases required for a law text?

4. Know your indexing software

Indexing software is there to assist you. Spend time learning how it works and what aids are there to assist you. Develop short cuts that work for you. Know what errors it can assist you to find. Know how to select sections of your index to focus on and any quick tips it provides for editing your index. For example, SKY enables you to colour tag entries. I use these tags to mark entries I need to check later.

5. Know your computer and software

It is important to know your computer setup and software. You usually export the index from the indexing software into something else, such as Word, to tweak the index before you send it. Become familiar with how that program works. Know how to transform a PDF file so the actual page numbers match the page number the program displays. Do you know how to convert and index from a PDF into a form you can import into your indexing software? Develop a routine for backups and think about what you would do if your indexing computer dies, you have no internet access or no power. Explore other software that can assist with short cuts, such as Margaret Berson's macros (<http://www.edit-mb.com/megabit/>) or even voice recognition software.

6. Know your indexing rate for that type of book

Keep detailed notes on each index you do. Not only is this useful to have when you are required to provide a quote, it enables you to estimate if you can index the text for the price quoted. For example, I keep an Excel spreadsheet that contains details of all my jobs. It includes details of the publisher and contact, title of book and edition, type of index required, number of pages, my estimated number of pages I'd index in an hour, the estimated cost to index and then the actual time taken and cost.

To do this accurately you need to keep records of the time spent indexing. There are various time tracking apps available. Fortunately, SKY keeps track of the time I have the index file open. I have developed the habit of closing the SKY file when the phone rings or when I take a break. I add additional time I may have spent initially converting an index before importing into SKY or any time I spend chasing information or editing offline.

7. Know where you can go for assistance

Develop an index reference library of books and articles. Have access to appropriate reference books or websites. Explore indexes to similar books in libraries or use the 'Look inside' feature in Amazon. Seek help from other indexers.

8. Keep up to date

This includes having the latest software, virus protection, as well as keeping up to date with what is happening in your pet subjects. For example, what are the new terms being used? Develop your own professional development plan. Learn new features offered by your software or learn a new skill, such as indexing annual reports or gain confidence indexing in another subject area you know. Suggest a topic for future Melbourne Indexers meetings.

Before you start indexing

When the text arrives spend a few moments examining the file. Confirming the job is as expected and you are able to send the index in the required form, is an important first step as it can save lengthy changes later.

1. Check you have the whole text.
Examine the contents pages and make sure you have all the sections. For example, do you have the appendix listed?
2. Check that the text is as you expected.
Is the content more academic than you thought? Is the job larger than expected?
3. Check the index size requirements.
Use this as an indication of the depth of indexing required.
4. Check the house style requirements.
How is the index to be presented? Is there a style guide on spelling?
5. Confirm the parts of the text to be indexed.
For example, do cited authors need to be indexed? Is there information in notes that should be indexed?
6. Do you have all you require to index?
For example, would a family tree be useful?
7. Do you have access to the index to the previous edition?
Closely examine the index. It may be worth spending the time to import. If there are significant faults it may be worth alerting the editor that your index will be different. For example, you will be adding more subheadings to avoid long runs of page numbers.
8. Determine how many pages you need to index in a day to complete the index on time.
The text has X number of pages and you have Y days until it is due. At a minimum you need to index X/Y pages a day to complete the index. In reality this time may be reduced as you have other demands on your time. Is this daily rate achievable? Allow time to edit and complete the index.
9. Clarify any questions you have with the editor/contact.
By clarifying things early, it enables the editor to check things and get back to you. Also flag any issues you may have early. For example, if the index is required on a Friday, ask if there is any wriggle room for you to send the index first thing Monday.
10. Don't be afraid to pull out.
Know when you are beat. Perhaps you can no longer index the text in the time provided, you are unwell, or the task is beyond you. Whatever the reason, alert the editor and offer the name of another indexer or forward them to Indexers Available.

Off and indexing

You are now set to go. Here are some ways you may be able to improve your indexing speed:

1. Know what work environment works for you.
Everyone has a different way of working. This can include working early in the morning or late at night, listening to music or using two computer screens. Determine what works best for you. Recognise your clues that you need to take a break or require more coffee.
2. Know what indexing method works for you and try to improve it.

We all develop a way of indexing. To change your method can take a while, but it is always worth giving new approaches a try. OHIO (only handle it once) method is something to strive for as best you can. Here are a few suggestions on how you may increase your indexing speed:

- Some indexers mark up the text first, others don't. Experiment with not marking up the text and adding indexing terms straight into the software. You don't need to go cold turkey. Perhaps mark up the first few chapters, feel happy with how the index structure is going and try indexing the later chapters without marking up.
- Use the contents page to help you develop a rough structure for the indexing terms.
- While you may not be required to index the glossary terms, typing the terms into the index can give you an idea of what terms to index and help form the initial structure for the index. It can also alert you later to possible terms you missed.
- Similarly, if there are illustrations to be indexed, index them all first. This not only ensures you have all the page numbers in bold (or italics), it can also give you an idea of the content of the books and early structure for the index.
- Work out what needs to be indexed and what can be left out. For example, do you need to index plant names under common names and botanical names? Do you need to index the cited authors? Does the information in the notes need to be indexed?
- You don't have to start at chapter one. Pick an easier looking chapter and index it first. This can give you confidence to tackle harder chapters. Chapter one is often an overview and returning to it later can give you a better idea of the depth required to index it. Just remember to mark which chapters you have done so you can check you have done them all.
- Spend time early getting the structure sorted. What is going to go under the main topic of the book? For example, in a biography, what is going to go under the person's name? How are you going to deal with all those army units?
- If the text covers different topics in a similar way with the topics broken up under similar section headings, develop a framework for the index terms to be used.
- Seek guidance to get the structure sorted. This could be examining indexes to books on similar topics or talking about the problem with someone else. You may even need to consult a previous job for hints.
- Tag entries that you want to look at later. For example, I tag entries I know aren't quite worded correctly. I find by doing this and moving on the solution eventually comes to me.
- Use your indexing software and other apps to assist to help to reduce errors. For example, cut and paste names from the PDF to the indexing software.
- Develop short cuts to reduce typing and/or key strokes. For example, I enter Ma?ori and change to Māori later.
- Always add a subheading to a term. They are a pain to add later and can easily be removed if not required.
- Dip into your grab bag of terms, subheadings and cross references you regularly use for indexing books in this area.

- Edit as you go or later? If the structure isn't working or needs tweaking, I'll pause to get that right. Minor tweaks or checking, I'll often tag and check back later.
 - Cross reference as you go or later? I will often add cross references as I go and then if I find the term is being used I'll tag it, continue to index using that term and then later decide which term I prefer or perhaps double post.
3. Use a previous index
For some indexing jobs, such as indexing annual reports, it is worthwhile spending time importing the previous index. Always examine the previous index critically to determine if it is worth importing all or part of it into your indexing software. If you think it is usable, this can save time.
 4. Seek help with the indexing. Perhaps you can subcontract part of the indexing, such as the index of cited authors or the case list.
 5. Know what indexing mistakes you commonly make and have a checklist to reduce them.
 6. Keep track of any changes you need to make during editing or after you have exported the index. For example, any alterations to filing order or expanding abbreviations you have used while indexing. Also note anything you may need to check with the editor.
 7. Keep track of how you are going
I tick off every ten or twenty pages I have indexed so I can keep an eye on how I am going. I also tick off the chapters. This not only gives me a sense of achievement, it alerts me to how I'm going with my daily allocation of pages and if I am on track to finish in time. If things are not going to plan, flag this early with the editor. They may have some wriggle room you can tap into. Don't forget to allow time for editing and preparing the index to send.
 8. Familiarity increases speed
As mentioned, if you are indexing in a subject area you are familiar with you will index a lot faster. You are also likely to increase speed as you progress through the text and become familiar with the author's style.
 9. Deal with the distractions
Phones ring, emails ping on arrival, and household chores can distract us from indexing. Some distractions have to be dealt with, however others can be reduced. For example, turn off your email and only look at it at set times. Divert phone calls to an answering machine. Educate family and friends that while you are at home you are working. Seek help for the household chores. For example, employ a gardener or encourage family members to assist with chores.

Preparing to send the index

Preparing to send includes editing the index, completing various checks and making sure it is in the requested form.

1. Use the software to assist with editing
For example, it can alert you to duplicate entries, problems with page numbers or faulty cross references. Use spell checkers to alert you to possible errors.
2. Develop a checklist of things you need to check at this stage. For example, checking for your common mistakes. Check the index is the required length and is in the style the publisher requires.

3. If you are having trouble reducing the index down, double check with editor to see if there is additional space available.
4. Compare your index with the previous index to make sure the missed concept has been removed in the new edition. Mentally justify why you have done something differently, in case you are questioned later. For example, you didn't index every occurrence of a topic, only the pages with useful information.
5. Pause. You may have a gut feeling something isn't quite right. If possible pause and take a break before sending. For example, sleep on it, double check in the morning and then hit send.
6. Know when to stop
You are unlikely to produce a 100% perfect index. Know when to stop and hit send.

Look back

Spend some time thinking about how you went with the job. What worked, what didn't work?

1. Record the actual time spent on the index. Was your estimate fairly accurate?
2. Where do you feel you got bogged down? What caused you to be bogged down? How could that be have been avoided? Are there things you need to learn or skills you need to develop further to improve that?
3. If you were going to do that index again what would you do differently?
4. Are there things you learnt that are worth recording or repeating in future jobs. For example, how did you sort out those army units?
5. Were you requested to change things? What can you learn from those requested changes?
6. Pretend you are your own boss and step back and be very critical of the whole job. Would you employ this person again?
7. Record any praise you received from the editor, for moments of self-doubt.

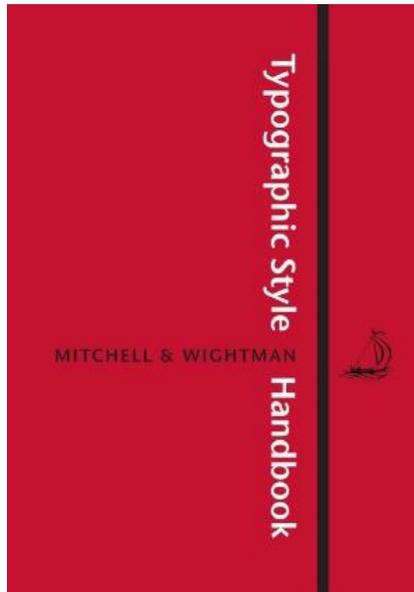
References

The first two references were used to put this session together.

- Mertes, Kate. Indexing: Creating and Maintaining SPEED. ASI DVD (available for loan from Melbourne Indexers library).
- Apel, Amy. Improving indexing speed. This is a review of a session given by Kate Mertes in 2011 (available via <http://www.amyapel.com/upload/Keywords%20article%20on%20indexing%20speed.pdf>).
- Coates, Sylvia. Measuring value: worth your pay and paid your worth. *The Indexer* 2012;30(4):191–8 (available for free via <https://www.theindexer.org/online.htm>).
- Kells, Kari. How do I index thee? Indexers count the ways. *Keywords: the newsletter of the American Society of Indexers*, 2004, April-June and October-December (available via <http://www.karikells.com/Indexer/about/publications/>).

Mary Russell

Typography style



I stumbled upon the *Typographic style handbook* by Michael Mitchell and Susan Wightman (MacLehose Press, London, 2017). What makes this different from style guides such as Chicago and Oxford is that it discusses style from a typesetting perspective with the aim of guiding readers to developing their own house style. It goes through the principles of setting out text in a book, explaining the terminology and any rules that apply. Each concept is accompanied by at least two style examples, so you can compare and decide which works best. For example, comparing the use of BC and AD in capitals and small capitals. It explains the implications of some styles. For example, using a different colour for the headings in tables adds to printing costs and should only be considered if the publication is already being printed four-colour. Where appropriate they explain why they prefer one style over another.

Two pages are devoted to indexes. It points out that indexes are set out in columns, usually two, three or four, on a page. They are left justified and the text can be smaller. The displayed options have two spaces after the headings and before the page numbers. They show styles with and without an initialled letter before each section of the alphabet and compare illustrations indicated with italics and bold. They compare set out indexes. The first style has turnover lines indented 1 em, subheadings indented 2 em and turnover subheadings indented 3 em. The second style has turnover lines for main headings and subheadings indented 2 em and subheadings indented 1 em.

Style 1

Lime Street 432, 491
London 39, 82–4, 86, 102, 109,
140, 195, 239, 260, 355, 369,
439, 515
British Museum 92, 213
Broadcast House 119
Grosvenor Square 221, 225,
244, 251, 442, 514
Museum Street 220
Victoria Square 214
London Review of Book 120, 167
420, 466

Style 2

Lime Street 432, 491
London 39, 82–4, 86, 102, 109,
140, 195, 239, 260, 355, 369,

439, 515
British Museum 92, 213
Broadcast House 119
Grosvenor Square 221, 225,
244, 251, 442, 514
Museum Street 220
Victoria Square 214
London Review of Book 120, 167
420, 466

They prefer the second style as 'it reduces the number of indents, and that the sub-entries hang out to the left of the turned over lines, making them easier to see.' They also list this style in their own house style.

The index to the book is a combined glossary and index with a line space before each entry and the definition left justified before any subheadings in a lighter shade. They also have an unusual style for *see* references. For example:

capitals or caps
see 'upper-case'

captions 122–127
test containing information about an
illustration, placed close to it
in margins 127
multiple captions on a page 125
numbering 124
position 123
punctuation 123
size 122
tombstone captions 126
type style 122

case binding 243
mechanically produced hardback
binding

centre set
a succession of lines of varying length,
set to line up on a central vertical axis
chapter headings 99
sub-headings 104

Mary Russell

Upcoming meetings

Day: First Thursday of the month

Venue: Hawthorn Library meeting room 1 (called Glenferrie), 584 Glenferrie Road, Hawthorn

Time: 6.00 – 8.00 pm

Carparking is available down the side of the building. If you are travelling by public transport there is a tram stop nearby, and Glenferrie Station is just a couple of tram stops away.

After the meeting we will go to a local restaurant for a meal (at own expense). For those travelling by public transport, there is always plenty of space in members' cars to enable us to all get to the restaurant quickly. You will also be well located for getting home afterwards, with the train station and tram stops just a short walk away.

August 2	Selecting indexing terms	In a group exercise we will select indexing terms for a short article and compare the results.
September 6	Shortened forms	Shortened forms can be abbreviations, contractions, acronyms, initialisms or symbols. What's the difference? What punctuation is needed? How are they capitalised? How do you make them plural? How do you index them? And where are they filed?

Contributions to *Melbourne Indexers Bulletin* are welcome at melbourneindexers@gmail.com