

The Slice

A Potomac Indexing Newsletter

VOLUME 10, NUMBER 1, WINTER 2017

Every Index a Custom Job

by Joanne Sprott

Why are book indexes so inconsistent? All the different variations create all kinds of questions.

The short answer is that every index is a custom job.

Author clients and new indexers are often flummoxed when we use the “it depends” motto of book indexing. There’s a natural tendency to want a set of black-and-white rules for indexing (and also lots of other things). But there aren’t any (well, maybe a couple).

There are some important best practice approaches for indexing all kinds of books, though. Take a look in this issue’s Resource Finds for both general and specific conventions.

But mostly, it’s about making the index work with the publisher’s chosen style options and the specific text at hand. Indexing scholarly books is different from indexing how-to books. And cookbooks are a whole other specialty. Then there are legal and medical books, which require a lot more subject expertise than most others. So much about choices on what terms to index and how to organize them will be customized.

This custom-job thing makes our work more interesting, but one has to maintain a nimble mind and keep track of client preferences to produce the index that is desired.

Just for fun, the following are some questions I normally get from authors and new indexers from their experiences as index creators or users:

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Help! My Index Doesn’t Fit!

by Meghan Brawley



So there you are, sighing in relief and stretching your shoulders, because you care about ergonomics. You’ve just typed in the last entry from the last page, and you’ve done all your basic editing tasks (spelling, deleting unnecessary subheadings, checking acronyms, you know the drill). It’s time to check the length against your client’s specs. You’re okay, you think, because you made sure to keep an eye on things at the halfway point, so you open your index in Word and, oh, horror of horrors! It’s too long. What in the world to do?

Maybe your client is willing to give you a bit of extra space, or can shrink the type size a point or two. Sometimes a shift from indented style to run-in will free up significant space. Giving you more pages often means spending more money, though, and what if the index is already set in 8pt type? Or a run-in (scholarly style) index just won’t suit the publishing conventions for the type of book? Before you go to the client, remember they consider it your job to make the index fit. So unless making it fit the space will make the index unfit as an index, you’d better take a stab at shrinking things down. Here are a few places to start.

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Welcome to this Winter’s Edition of Slice!

Potomac Indexing had a busy end of year, and now we are ramping up for the influx of spring book indexing projects, both back-of-book and embedded. We are also working on a fascinating information architecture project for the first quarter.

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In the News

...A nice article in BookBusiness from late last year calls for better quality metadata, something that we work on in our content strategy projects. It’s no always about quantity of access points—are they significant? More [here](#).

...Interesting article and intro to a video on the 18th-century “New Age” writer, Emanuel Swedenborg, who indexed his own work.. Read more [here](#).

In this column, we’ll tune you in to interesting blog posts and news articles around the Web. Your finds or links to company news are welcome. Just send them to the Slice editor at editor.slice@potomacindexing.com

Indexer Associate Profile: Rebecca McCorkle



Your Business

PI: How long have you been an associate at Potomac Indexing?

I have been an associate at Potomac Indexing since 2013.

PI: Tell us your indexing (or other information access system) origin story. All superheroes, including indexers, have an origin story.

I have a bachelor's degree in both psychology and sociology. I worked as a paralegal for awhile after college, thinking I might want to go to law school, but eventually decided it wasn't for me. After that I got a job as a certified pharmacy technician and did that for almost six years. I got to the point where I really wanted something different, in particular something where I could have more freedom over my own schedule. I also wanted something mobile that I could do from anywhere. I jumped on the Internet one day, not really knowing what I was looking for, and I found indexing. It sounded perfect for me, and within a week I had joined ASI and had started the ASI training course. It took me about a year to get through it, and afterwards I did Enid Zafran's indexing boot camp. This was in 2011 and since that time I have had a constant flow of work, and I love being an indexer!

PI: What are your specialties and/or favorite subjects?

I index a mixture of both scholarly books and textbooks on a wide range of topics, and I find I really enjoy the variety that gives me. My favorite subjects to index are history, psychology, and anything medical-related.

PI: Pick one of your favorite subjects and tell us why it fascinates you.

I have always had a great love for history, particularly anything involving cross-cultural studies. I find it fascinating to study different cultures, which is probably one of the reasons I enjoy traveling so much. I enjoy learning about different ways of life and experiencing the history, food, art, and music of other people and places.

PI: What's your best productivity or indexing secret tip (that you are willing to share, that is)?

When I first started indexing, I would agonize over things such as word choice and phrasing for entries. I finally learned to just get something down and to make a note to revisit it later. I feel like this has made me more productive and has allowed me to move through the text at a better pace.

PI: What do you consider the most challenging aspect of the work?

I think the most challenging aspect for me was adjusting to being self-employed. For someone who has never worked out of a home office before it takes great self-discipline and motivation.

As far as indexing itself, I think the most challenging part for me is at the start of a new project. Sometimes it can feel overwhelming depending upon the subject matter.

PI: Where do you usually work? (Please include a photo of your office setup unless it's a secret superhero location)

I always say I have two offices. I have my daytime office, which is my desk in the actual office. Then I have my evening office, which is the oversized chair in the living room where I like to sit and work on my laptop in the evenings. It is especially nice with the fireplace going on a cold evening.



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PI: Talk about your process (and this can be for book indexing or other related projects, like keyword tagging, embedded indexing, etc.). Any advice for other professionals—new and experienced?

Depending upon my level of familiarity with the subject matter, I may spend some time doing a bit of research before beginning to index. Usually after that I will make one pass while vetting the book. This gives me a good overview of what topics will be discussed later on. I then make my second pass which is where I am indexing for detail. Once I am finished I have an editing process for which I have made myself a checklist.

I always find it so interesting to attend conferences and workshops and hear about the different processes used by different indexers. I often return home and incorporate some of those various elements into my process, especially things I think will help make me more efficient.

PI: What are your favorite/most-used tools, for indexing or other business purposes?

I find my Merriam-Webster dictionary and thesaurus apps to be incredibly helpful, especially if I am working in the car or someplace where I don't have Internet access at the moment.

PI: CINDEX, SKY or Macrex (or other)? What do you like best about your choice?

I use CINDEX. It just made the most sense to me and really appealed to my sense of organization. Over the years I have learned to use many of the shortcut features which, in my opinion, are great time savers.

PI: If you could only recommend one book about indexing, what would it be?

I have found Noeline Bridge's Indexing Names to be a great resource when confronted with challenges regarding name entries.

PI: Where's the neatest location you've ever worked in?

Probably on the beach in Belize with a pina colada sitting next to me.

Personal Perspective

PI: Where do you live (just approximately)? And if you like, tell us a bit about your surroundings and folks you live with (including furry friends) if you wish.

I live in east central Illinois. Sometimes it feels like the middle of nowhere; however, it is 20 minutes from a couple of larger towns. I enjoy the peace and quiet, and also little things like seeing deer in the back pasture or walking outside at night and being able to see the stars. Also, it is equidistant from three major airports if I decide I need to get away!

I live with my wonderful boyfriend of ten years, and the only furry friend we have is the giant bear rug in the living room!

PI: Tell us about your hobbies. Are there specific ones you turn to as a break from work, or any that are a special treat in between or at the end of projects?

I am a huge sports fan, so during the winter it is all about college basketball (go Duke!) and in the summer it is all about baseball (go Braves!).

My greatest passion, however, is travel. I have always wanted to see the world. Indexing has given me freedom and portability and has allowed me the opportunity to do some amazing things in the last few years. One of the biggest was back in 2015 when I was able to spend three weeks in India and fulfill my childhood dream of seeing the Taj Mahal. I spent a couple weeks in Ireland last year and am looking forward to visiting Scotland later in 2017.

PI: What's the last book you read for fun?

I am currently in the process of reading J.R.R. Tolkien's The Lord of the Rings. I enjoyed the movies and have always wanted to read the books.

PI: What's your superpower?

I would say my superpower is my memory. I have always had a freakishly good memory, even if I'm not trying to remember things. It comes in very handy for indexing when I need to go back to something and usually know right where the information is located.

PI: Thanks so much, Rebecca!

You can find Rebecca McCorkle online at [Prairie Indexing Services](http://PrairieIndexingServices.com) where her focus is primarily on scholarly books and textbooks.

Why do some indexes have the subheadings laid out individually with a line for each one, and some indexes have the subheadings running off the main headings in little paragraphs?

It's a space thing. Most users and indexers will tell you that the indented/line-by-line layout is much easier to scan when looking for terms. You will see this style in most how-to books, technical manuals, and science books. Long ago, though, many university presses in particular got in the habit of smushing all the subheadings into little paragraphs in order to save some space in the index and money on printing. And universities are reluctant to change long-standing tradition. So, we have two basic layouts:

Control, sense of: in adolescence, 95;
assumptions about, 147; coping with illness, 36–37; as critical family issue, 30–31; fear of losing, 95, 182, 202; with Parkinson's disease, 353

OR

Control, sense of

adolescence, 95
assumptions about, 147
coping with illness, 36–37
critical family issue, 30–31
fear of losing, 95, 182, 202
Parkinson's disease, 353

Why do some indexes have little letters at the beginnings of alphabetical groups, and some do not?

Again, it's a preference that seems to separate the how-to/tech manual folks from the scholarly (and sometimes trade book) folks. And for the same reasons as the previous layout preference. No separate letter equals less space taken up by the index.

B

b trust. *See* credit shelter trust

back-end ratio. *See* debt-to-income ratio

back-end sales charge, open-end mutual fund, 191

C

C corporation, 299

(continued on next page)

Cut the double postings

Who doesn't love a good double posting? No need to take time following a cross reference when you can just put the same entry in multiple places (using synonymous main headings, not exact duplications, of course!). If you've used double postings, now's the time to pick one to be the main one and convert the others into See cross references. So you go from

development

environmental damage due to, 77, 102, 187–88
naming of housing developments, 194
1920s land boom, 9, 15
Space Coast, 64, 68–69, 154

AND

housing industry

environmental damage due to, 77, 102, 187–88
naming of housing developments, 194
1920s land boom, 9, 15
Space Coast, 64, 68–69, 154

TO simply

development

environmental damage due to, 77, 102, 187–88
naming of housing developments, 194
1920s land boom, 9, 15
Space Coast, 64, 68–69, 154

AND

housing industry. *See* development

Check those subs

You've already made sure you don't have orphaned single subheading or subheadings for 5 or fewer page numbers. But have you over-analyzed some entries? You should be able to sort your index so the mains stay in alphabetical order but your subheadings are in page number order. This gives you the chance to make sure you haven't put in more subheadings than are warranted. Typically, you want to avoid multiple subheadings that point to the same page, and you can also see if there is a broader term that would encompass several subheadings in a range of 4 or 5 pages.

(continued on next page)

For our associates in particular, in addition to keeping the usual resources for book indexing like the latest Chicago Manual of Style, as well as a dictionary and thesaurus on hand, we also have some more specialized documents available to us, some of which our associates may not have discovered yet.

So, here are the ones in PI partner Meghan Brawley's bookshelves. Let us know via email of any interesting resources to add. In Meghan's own words:

[ASI Best Practices](#) is a useful set of guidelines for indexing. While it can't avoid the indexer's maxim, "It depends," it does provide clear principles and explanations, and is a great starting point for creating a good index.

PI's [A Brief Writer's Guide to Indexing](#) is just what it sounds like—an overview of the basics of indexing, from software to subheadings by our PI partner, Joanne Sprott.

Margie Towery's "[Creating Better Indexes](#)" is a 10-part series in the newsletter of the Heartland chapter of ASI (found under the heading "Indexing Practice" at the above link).

For name indexing, The Indexer's "[Centrepieces](#)" are an invaluable quick reference.

Seth Maislin's "[Troubleshooting Those Horrible Microsoft Word Index Problems](#)" is by far one of the best embedded indexing gotos out there. Even with IXMLEmbedder and other tools that simplify embedded indexing, something wonky always happens.

Bookkeeping Changes

We at Potomac Indexing would like to take this opportunity to recognize our associate and former PI partner Kay Schlembach's contribution of bookkeeping services for us after her partner retirement last year. Now, she's ready to move off into just her own business and other interests, so we are welcoming another associate with accounting experience, Tabitha Rimmer, who will be taking over this important support function. **Thanks to you both!**

C trust. See qualified terminable interest property trust
call option, 193
callable bond, 189

Why do some indexes have little parenthetical terms next to titles of works (e.g., newspaper, journal, film, books), and why do the books have the authors' last names after the title?

It's that customized job thing. Keep in mind that we as indexers are trying to provide both a clear as well as concise idea of where the terms or names we choose can be found in the text. With titles of works, we need to make it clear who created it (mostly as a courtesy/tradition), if the author mentions this (you don't have to go look them all up) or be able to keep periodicals straight, especially if there are lots of them with similar names. But if there aren't very many titles of works, we just fall back on common sense and stick to acknowledging authors of books with their last names, and only using other explanatory parentheticals if there's more than one version of a title (e.g. a film vs. play version of a work with the same name).

Ed Sullivan Show (TV show)

Goodbye, Columbus (Roth)

I've Got a Secret (TV show)

New York Times (newspaper)

"Over the Rainbow" (Arlen and Harburg)

Time (magazine)

The Wizard of Oz (film)



Joanne Sprott, a PI Managing Partner, has been indexing, editing and proofreading books and other documentation since 1995.

In addition, maybe you can stretch the page range requirements, or the number of undifferentiated locators. Don't go crazy; you don't want a string of 15 page numbers after a heading, but maybe you can get away with 7 instead of 5 in one or two places. Perhaps a page range of 12 pages is acceptable, rather than sticking to 10. Use your judgment, of course, but remember Do Mi Stauber's Second Rule: Make sub-headings only for the purpose of breaking down the information in the main heading. If you can stretch your locator limits and still serve the user, go for it here.

Take a look at names

If your index is very name-heavy, it's a good idea to go back through and see if there are mentions you can cut altogether. This will only save you a line at a time, but these lines can add up. Beware: This can be a time-consuming process, and you can take a few steps during the initial indexing to save you time at the end. One thing I do as I'm indexing is color-code or otherwise identify (asterisk, perhaps?) all entries that could be left out. When it comes time to edit, I can just go through and find all the purple entries and delete them. Another tip is to make sure you set expectations with your client from the beginning re: names. A simple phrase expressing inclusion of "significant mentions of names, but not necessarily every mention," can go a long way.

Talk to the client

These will certainly help you shrink your index, but you may still end up too long. When it starts to look like quality will be impacted, and as far ahead of deadline as possible, talk to your client. Explain that the space provided won't be enough to adequately represent the book, and see what they offer. Still, check with your client before you start missing deadlines, or turning in work they either can't use or may cut heavily—without your input. That's just good business.

Meghan Brawley, Managing Partner at PI, indexes and provides research services from her home office in Georgia.



Fresh from the Oven

From Joanne Sprott: Joanne is still getting used to the rainy season in Oregon since her move last summer. Snow on the mountains in the distance, and crocuses coming up in the garden.

From Richard Shrout: Richard is settling in to life in a house rather than apartment in Kansas and enjoying the extra space, along with getting used to the weather in the American Midwest.

From Estalita Slivoskey: Estalita reports that her husband has been offered a coaching job at a college in...North Dakota (she's lived there before) starting this summer, so she and her family will be saying good-bye to their West Virginia digs and following Richard and Joanne on the western "trail."

"Fresh from the Oven" provides a space for our partners and associates to let us in on their personal and work lives as freelance professionals.

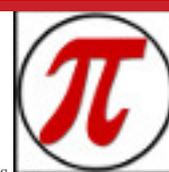
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Comments and Questions: Contact Joanne Sprott, Editor and Designer at slice.editor@potomacindexing.com