

**Adapted from Susan Olason's LET'S GET PROFITABLE! Program (copyright September 1999 by Susan Olason)**

	INDEXING WORKFLOW	SOFTWARE/HARDWARE	MARKETING	FNANCIAL
<b>PLAN</b>	Indexing workflow is the plan. - Identify workflow steps - Can steps combined? - Can steps be eliminated? - are steps missing? (combining scattered entries) - Can new methods reduce keystrokes? - Can steps be made more efficient with software (macros; abbreviations; hotkey; add-ons) - Do some steps cause other steps to be repeated? Can they be logically reordered to reduce repetition? (run spellcheck later in process )	These are the most important purchases! Develop plan based on needs. Buit don't chase the latest development; you can't keep up.  - Consider all vendors - Match capabilities with your workflow - Evaluate user interface (it'll be in your face every time you turn it on!) - Evaluate vendors - Consider reconditioned hardware	Develop a marketing plan based on goals for your indexing business;  Develop and maintain a database of qualified prospects. (This is the heart of your business and saves you in the lean times.)	Develop financial plan based on goals: - Income goals - Profitability goals - Marketing goals - Software acquisition goals - Hardware acquisition goals - Office environment goals - Scheduling goals (How many hours a day do I want to work?) - Education goals (don't get behind!) - Quality of Life goals (hardest to nail down but essential to figure out!)
<b>RE-EVALUATE</b>	Analyze indexing workflow frequently (every few months if experienced; immediately if deviating above or below average hourly rate)	Monitor indexing workflow and business for new requirements and ease-of-use.	Monitor client workload against goals.	Monitor budgets against performance monthly. Calculate profitability monthly (Income versus expenses)
<b>OPTIONS</b>	Constantly evaluate options: pressure; indexing software (user manuals; workshops; reverse engineering - - discover why capability exists to give you ideas for your workflow; discussion groups; indexing articles; SIGs). Determine how they may fit into your indexing workflow.	Research all vendors. Products improve. New products are developed. Vendors change.	Never stop marketing. Options include: direct mailing/emailing; followup to mailings; cold calling (with prewritten scripts); client referrals; networking with other indexers; SIGs; advertising; conferences and trade shows; mentoring/apprenticeships; membership in related organizations; discussion groups; web sites; business expansion possibilities	Justify spending in relation to goals: How will this purchase help me achieve my goals?
<b>FINE-TUNE</b>	Adjust indexing workflow by selective (not haphazard) application of options.	Test potential software (see how intuitive it is for you) with simple and complex indexes; test potential hardware's operating system.	Adjust marketing plan by moving prospects into Valued Client status (80/20 rule: 80% of work comes from 20% of clients).	Reallocate (don't add) money if needed.
<b>IMPLEMENT</b>	Execute fine-tuned plan for at least 5 projects; keep new pace up to maintain edge.	Execute fine-tuned plan.	Execute fine-tuned plan.	Execute fine-tuned plan.
<b>TRUST YOUR INTUITION</b>	If the options you've tried to implement are not intuitive at this time, set them aside but remember to try them later (circumstances and readiness change).	Your intuition is your indication of progress.	Your intuition is your indication of progress.	Indication of progress-- you truly know when you're doing it right.

## indexing\_workflow.xls

### 1.0 Vet Package

#### 1.1 Review cover letter

#### 1.2 Review page proofs

- 1.2.1 Call client if missing pages
- 1.2.2 Call client for clarifications
- 1.2.3 Punch pages - fit into notebook

#### 1.3 Send confirmation to client

- 1.3.1 Confirm special instructions
- 1.3.2 Confirm delivery date and method

### 2.0 Read/Mark Page Proofs

#### 2.1 Read front matter to get "flavor"

#### 2.2 Identify index entries (use different colored highlighters as desired):

- 2.2.1 Highlight chapter/section titles
- 2.2.2 Highlight subheadings
- 2.2.3 Highlight terms
- 2.2.4 Highlight concepts
- 2.2.5 Highlight proper names
- 2.2.6 Highlight titles of works

### 3.0 Input Entries

#### 3.1 Input entries for each chapter/section

- 3.1.1 Input chapter title as main entry (include page spread for entire chapter)  
[always put in chapter spreads; will always have a context for every entry later in the editing process]

- 3.1.2 Input subheadings as subentries (read paragraph to determine wording)
- 3.1.3 Input terms as subentries (read paragraph to determine wording)
- 3.1.4 Input concepts as subentries (read paragraph to determine wording)

- 3.1.5 Input proper names as main entry
- 3.1.6 Input titles of works as main entry

#### 3.2 Double-post subentries as main entries

- 3.2.1 Input subheads as main entries [scan index for main entries with subentries]
- 3.2.2 Input terms as main entries [duplicate main entry; find duplicated records]
- 3.2.3 Input concepts as main entries [delete main level, subentries will move up a level]  
[edit new main entries as required - prepositions]  
[delete unwanted new main entries]  
[edit/propagate command; copy entry with subentries; delete main entry; all subentries move up one level]

#### 3.3 Input cross-references as you think of them

#### 3.4 Input inverted terms as you think of them (copy, then edit)

#### 3.5 Backup periodically

#### 4.0 Edit Index

##### 4.1 Review index for waffles (switching terms for same thing)

- 4.1.1 Identify waffles from knowledge of subject matter (edit main entry; putting waffle in parens)  
[edit other main entry, putting waffle in parens]  
[FIND, restricted to main entries, either waffle term; duplicate records, create index subset]  
[double-posting waffles will duplicate and combine page references from both waffles]  
[keep both words, because the reader may not find the term on that page but the waffle term will be there]  
[last action - delete original record with undifferentiated page references]

##### 4.2 Double-post acronyms/abbreviations

- 4.2.1 Scan index for main entry with acronym/abbreviation, a spell-out, and subentries (FIND using "(" )  
[type See reference: spell-out to acronym/abbreviation or vice versa]
- 4.2.2 Scan index for main entry with acronym/abbreviation, a spell-out, but no subentries  
[input main entry with spell-out followed by acronym/abbreviation in parens or vice versa]

##### 4.3 Review consistency/parallel construction of similar entries

- [probably only time you go back to page proofs]
- [double-post new subentries]

##### 4.4 Review main entries for too many subentries

- [create main entries from subentries; edit/propagate - then remove subentries from original if overindexed]
- [- or - break main entry into new main entries - with See also from original entry]

##### 4.5 Collect scattered information

- 4.5.1 Scan index for main entries that sort near each other and may be combined  
[determine if main entries should be combined]
- 4.5.2 Scan index for main entries that have combined page numbers (from double-posting of subentries)  
[scan index for every occurrence of term as a subentry]  
[determine if combined page numbers should be used in each subentry]  
[edit page numbers for subentries]  
[use FIND command to define subset; think the info through and see if all occurrences fit all entries or only some]
- 4.5.3 Scan index for entries that should be combined under a new main entry  
[scan on common phrases/words in scattered entries - use the FIND command]  
[create a new main entry from common word/phrase with new subentries from previous scattered main entries]

##### 4.6 Clarify undifferentiated main entries

- [to find cross-references - use FIND command restricted to page number]
- [don't modify original records; just scan screen for occurrences]
- [FIND command - restrict to main entries with pattern of four or five commas]
- [FIND command again - use term that might appear in entries]
- [create subset - flip subentry to main and main to subentry]
- [or add new subentry using the chapter spread for wording]

##### 4.7 Review entries for clarity and conciseness

##### 4.8 Review main entries for too few subentries

- [combine subentries into main entry as needed]

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### 4.0 Edit Index (continued)

#### 4.9 Verify cross-references

- 4.9.1 Verify cross-references refer reader to an existing entry  
[scan index for *See/See also* cross-references; locate target of cross-references; edit if necessary]
- 4.9.2 Verify cross-reference is not circular  
[scan index for *See/See also* cross-references; locate target of cross-references; edit if necessary]
- 4.9.3 Verify *See* cross-references are from entries with NO page references (vocabulary control)  
[determine if *See* entry has page reference; edit if necessary]
- 4.9.4 Verify *See also* references are from entries WITH page references (additional information)  
[determine if *See also* entry has page references; edit if necessary]
- 4.9.5 Verify cross-references are to more than TWO/THREE references (otherwise just double-post)

#### 4.10 Spell-check index

- 4.10.1 Look up unknown words in page proofs [spell-check in page sort order; reduces back-and-forth]
- 4.10.2 Add unknown words to dictionary OR edit spelling of unknown words OR ignore unknown words

#### 4.11 Check accuracy of page references

- [check page numbers on screen while inputting]
- [put index in single records, in entry order, scan page field on screen for anomalies]

#### 4.12 Check formatting

- 4.12.1 Print index in final form
- 4.12.2 Review each entry for 4.1 through 4.7
- 4.12.3 Check formatting specifics:
  - style of index
  - entries capitalization, style, indentation
  - turn-over lines
  - alpha heads
  - cross-references
  - pages references style and compression
  - page layout for printing
  - sorting specifics
- 4.12.4 Confirm conformance with special instructions
- 4.12.5 Edit as required
- 4.12.6 Spell-check to catch latest changes
- 4.12.7 Verify cross-references to catch latest changes
- 4.12.8 Backup index

### 5.0 Deliver/Package Index

- 5.1 Edit index in word processor if necessary
- 5.2 Add Introductory Note if necessary
- 5.3 Print index in final form
- 5.4 Create electronic file in final form
- 5.5 Print and mail delivery letter with list of typos found [postit note each page/circle typo - combine at end]
- 5.6 Print and mail invoice (include extra business cards)
- 5.7 FedEx/UPS package to client (call for FedEx number)

## indexing\_workflow.xls

### 6.0 File Project Material

- 6.1 Print index in final format (for my records)
- 6.2 Print delivery letter with list of typos found
- 6.3 Print invoice
- 6.4 Collect client correspondence
- 6.5 Create customer folder (keep style sheet on inside of customer folder along with contact info)
- 6.6 Record formatting specifics and exceptions in folder
- 6.7 Record delivery instructions in folder
- 6.8 Record hours spent on each indexing workflow step
- 6.9 Organize folder by how I keep track: Client, then project -- separate tracking for invoices due; when paid, go into client fldr
- 6.10 Build project folders as materials are completed - don't wait to end
- 6.11 File immediately - NO to-be-filed folders

## How I Use CINDEXTM In My Indexing Process

One of the best tools you can have in your indexing arsenal is your indexing software. Indexing software takes care of the organizational aspects of indexing (formatting to the client's specifications) as well as provides you with powerful editing tools (temporary grouping, cascading changes, autocomplete, hotkeys, macros) that help you easily shape your index into its final form.

### Steps I take and decisions I make during my indexing process

Most indexers try different techniques and adapt their indexing style over time. I've outlined my current work style below and illustrated just how critical CINDEXTM is in all aspects of my indexing process.

#### **1. Creating CINDEXTM files based on client specifications.**

When I receive formatting specifications from clients, I input them into CINDEXTM and then save both template and stylesheet files for that client. I can then apply the saved template and stylesheet files (that contain the format settings) to new client projects.

#### **2. Familiarizing myself with the text and entering placeholder terms into CINDEXTM**

I don't mark up the text. Instead, I start indexing directly from the unmarked pages so it's crucial for me to familiarize myself with the material as much as possible before I start.

To that end, I try to obtain the Front Matter and Back Matter for my books. (Ask your clients for these additional materials — in case they aren't in the habit of sending them — because they help so much in understanding the overall structure of the book.)

I read the Table of Contents and the Introduction/Preface to understand the high-level structure of the book and the Glossary to get a sense of the terms the author considers important. As I start reviewing these terms and concepts, I enter them as *placeholder* index entries into CINDEXTM, with an entry of *term??* in the locator field. (Remember, these are *placeholders* so they don't correlate to any specific pages.) I also label the placeholder entries in red so they "pop out" visually in my preview window.

Completing this step helps me create the super high-level skeleton framework for the index and provides me with a roadmap as I delve deeper into the book.

#### **3. Entering index terms one chapter at a time**

Since indexing involves both a macro (high-level) and micro (detailed) approach, I use a two-phased approach when entering index terms.

##### *Macro level first*

For each chapter, I start with the high-level (macro) view. What are the main concepts for this chapter? How do these concepts relate to the high-level concepts for the entire book? What index terms should represent these concepts? How do these index terms relate to other terms in the index? And then I start creating the index entries that represent the answers to those questions.

During this stage (which goes quite quickly), I only peruse the chapter's section headings and ignore the detailed text.

As I input index terms, my CINDEXTM preferences are set so the preview of the index entry jumps to the section of the index that will accommodate the new term. I can see at glance what the surrounding entries are. I can make snap decisions about wordsmithing the new entries. In addition, with autocomplete turned on, I only have to type till autocomplete matches the phrasing I desire. If there isn't a match, I just input the entire phrase. These two mechanisms help me keep my index structure tight. As another time-saving device, I can customize hotkeys to insert whatever text I desire. (I have two of my hotkeys set to insert curly quotes.)

If I'm not unsure about a specific entry, I append short questions (to myself) to the index record.

I use CINDEK's abbreviations function, which consists of a table of short abbreviations and their equivalent expanded form. I create short (usually 2-character) sequences that I'm not likely to use in my normal course of indexing. When I need to flag an entry for later decision-making, I enter that predefined abbreviation and it automatically expands into the specific query I have for that term. Here are a few abbreviations I use as needed:

au ... (author??)  
dp ... (doublepost??)  
ne ... (needed??)  
piu ... (pick it up??)  
sc ... (scattered??)  
so ... (sort order??)  
wo ... (wordsmith??)

I always use double question marks (??) as my reminder that I have questions about a specific index entry. (All entries with ?? that haven't been resolved during the course of indexing get addressed during final editing.)

I also consider if flipping main and subentries would provide an appropriate entry. If so, CINDEK's flip feature easily creates the "flipped" entry in one step where main and subentries are demoted/promoted appropriately.

#### *Micro level next*

After I've finished entering the higher level terms for the chapter, I then go back to the beginning of the chapter and read the text itself.

By this point, I'm confident that I've already captured the major themes of the chapter, so I just concentrate on the individual details.

Of course, I might find a connection between other topics in other sections of the material and, as I do, I enter the appropriate terms — using the mechanisms I've described above to help me manipulate the entries quickly and surely.

I continue reading through the chapter (keeping my placeholder terms in mind in case I come across the concepts they represent) and create index entries as warranted. This is the substance/meat/flesh on the skeleton... the richness of the index... the golden nuggets.

#### **4. Repeating step 3 for each additional chapter**

#### **5. Editing as I go and final editing**

I edit as I go. Whenever I happen to come across something that needs to be edited, such as slightly different spellings or descriptive text for entries, or plural versus singular forms, or typos I discover, or discovering that an index entry now needs subentries because there are now too many undifferentiated locators or... The list is infinite of what's possible to find.

Whenever I encounter a record that needs a final decision, I stop what I'm doing and I deal with it on the spot. This helps in many ways (it saves *huge* amounts of time at the end of the project when I'm tired of the material and just want to get the job done) but it also helps in that I'm addressing the problem when my mind is focused on that term.

CINDEX also allows me to create temporary groups on the fly. Using the very powerful Find feature, I can search for words/phrases in an almost endless variety of ways... by pattern, main entry, subentry, page locator, formatting, combinations of words/phrases, etc. etc.

So my editing consists of (1) editing as I input and then (2) a final short editing step at the very end.

My final editing includes the following items:

- Quick eyeball of the index from A-Z to verify the entries look solid and nothing looks out of place
- Resolve remaining ??
- Spell check (CINDEX feature)
- Check my cross-references (CINDEX feature)
- Check for orphan subheadings (CINDEX feature)
- Check for out-of-range page numbers by putting the index in page order and checking the first and last page numbers
- Run IndexChk program (third-party utility for CINDEX)
- Verify the client's formatting instructions have been followed (CINDEX template and style sheets)

And that's my process. Hopefully it's given you food for thought on what you might incorporate into your indexing regimen.

Remember, your indexing process should always represent the best methods you've discovered to increase your efficiency and to create the best possible indexes you can create. And that includes learning your indexing software inside-out.



[illegible]

Legend:

1. Vet package
2. Read/mark page proofs
3. Input entries
4. Edit entries
5. Deliver/package index
6. File project material

**Project: Indexing**

**Date Contacted:** \_\_\_\_\_

**Client:** \_\_\_\_\_

**Manuscript:** \_\_\_\_\_

**Contact:** \_\_\_\_\_

**Approx Pages:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Rate:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Date to Me:** \_\_\_\_\_

**Due Date:** \_\_\_\_\_

**Delivery mechanism back to client:** \_\_\_\_\_

**Client's account number (delivery company):** \_\_\_\_\_

**Project Details:**

**Style Guides/Guidelines available?**

**Project Fee \$** \_\_\_\_\_

**Final per page rate \$** \_\_\_\_\_

**Total Hours:** \_\_\_\_\_

**Average \$** \_\_\_\_\_ **per hour**

**Total Pages:** \_\_\_\_\_

**Average pages per hour:** \_\_\_\_\_

Book Name				Date Contacted	
Organization				Date Due	
Contact				Book Rate	
Phone					
Email					
Part	From	To	Pages		
1					Formula D8: C8-B8+1
2					Formula D9: C9-B9+1
3					Formula D10: C10-B10+1
4					Formula D11: C11-B11+1
5					Formula D12: C12-B12+1
6					Formula D13: C13-B13+1
7					Formula D14: C14-B14+1
8					Formula D15: C15-B15+1
9					Formula D16: C16-B16+1
10					Formula D17: C17-B17+1
11					Formula D18: C18-B18+1
12					Formula D19: C19-B19+1
13					Formula D20: C20-B20+1
14					Formula D21: C21-B21+1
15					Formula D22: C22-B22+1
16					Formula D23: C23-B23+1
		Total pgs			Formula D25: SUM(D8:D23)
		Rate:			
		Total Fees	\$0.00		Formula D28: D25*D28
			Indicate manual entry fields		