

## ***From the Beginning: How to Approach a New Index***

On October 18, thirty indexers attended the inaugural session of ISC/SCI's new Professional Development series. *From the Beginning: How to Approach a New Index* featured a panel of four experienced indexers — Alexandra Peace, Pierke Bosschieter, Mary Newberry, and Marta Steele — who shared insights into their thought processes and workflows as they begin a project. Our panelists provided practical advice and reassurance. The discussion was thoughtful and engaging with good questions and comments from the attendees.

We'd like to thank our panelists for sharing their wisdom and experience, and our audience for contributing their questions and tips. We have attempted to summarize the session for those who were unable to attend, with the caveat that this summary can't fully convey the breadth and liveliness of the presentations and discussion.

### ***Starting with the set up***

Alex kicked the session off with a discussion of what she does when she receives a request for a quote. Alex sends a generic estimate for what is involved, and asks them if this works for their budget. She always asks for the full manuscript before providing a firm quote. Pierke also looks at the complete book to estimate the project cost.

Pierke sends detailed terms and conditions with the cost proposal and asks the author to read them carefully to ensure they understand what they can expect. She also asks them to let her know if they would like a different approach. Pierke includes a requirement that authors provide an unprotected PDF so she can annotate it. She also explains that she doesn't index passing mentions and gives the author an option to request something different.

Marta asks the author what sort of index they want and invites them to send her a copy of their favourite index to emulate.

Once a project is confirmed, Alex sets up her administrative system: she creates client email and project document folders, and sets up the project in Toggl for time tracking. Alex maintains a project tracking spreadsheet with details like client name, job type and description, fee, and notes. She also prepares a draft invoice to finalize when the index is complete, and records the job details in her work notebook with half a page per job as a backup in case of emergencies.

Mary also completes her administrative setup before starting to index. She may also look at indexes for the same author or publisher, making notes if she finds something she doesn't like, so that she can validate why she indexes in a certain way.

### ***Calculating daily quotas***

Alex calculates a daily quota by dividing the number of indexable pages by the available indexing days, after subtracting time for editing. She tracks quotas for multiple projects and moves between them once each day's target is met, often stopping mid-chapter.

Mary also sets a daily quota but prefers to finish a chapter per day (or over two days for longer ones) and usually works on one project at a time. Pierke aims to complete a chapter in one session, especially in multi-author books, though she may split longer chapters over two days.

Marta prefers books under 350 pages with a month-long schedule, allowing a week for revisions with the author.

All four panelists noted that multi-authored texts require more time than monographs.

### ***Preparing the manuscript***

Alex creates a separate PDF for her notes, marking those with substantive information so she can view them on a second screen and quickly see which need indexing. She ticks each note once it's entered. Pierke also makes separate PDFs for the indexable text, endnotes, and bibliography, removing white space to enlarge the text and adding large red page numbers at the top and bottom for easier on-screen reference.

### ***Preparing and starting to index***

All our panelists print out and review the table of contents.

Mary notes that the title, table of contents, and text can each give different impressions of a book. She reads and deeply indexes the introduction, using colour coding to track key concepts, then verifies that those ideas appear in the text. If not, she checks with the author to see whether they were expressed differently in the text or appear only in the introduction.

Earlier in her career, Mary used to read the book through before she started indexing. She learned a lot by doing that; however, at some point, she realized this was taking more time than necessary, and she felt that she was skilled enough to start indexing without reading the entire book. Now, she mostly indexes as she reads.

Alex reads the introduction and looks for an outline that shows what the author intends each chapter to cover. She sometimes colour-codes descriptions of the chapters or sections in the introduction for easy reference. She revisits it as she starts each chapter and uses it as a check.

Pierke reads the introduction and conclusion and skims through the book to help her identify the metatopic and main topic and to assess her familiarity with the subject. If needed, she researches before indexing. She indexes the introduction and conclusion last to ensure all key concepts are included.

Pierke reads through a chapter before she begins indexing it in SKY. She uses SKY templates that she tailors for each publisher. She uses an iPad and Apple pencil to highlight (a lot!) and make notes in the PDF. She then opens the PDF on her computer to the left of the main working screen and uses macros to make inputting easy. Pierke uses PDF software that allows her to copy and paste highlighted text. She uses a macro keyboard and has various actions under macro keys.

Marta reads the TOC and determines how descriptive of content the chapters and subheads, if included, may be. She then reads the introduction and conclusion of the book as well as any relevant front matter, even if it is not to be indexed.

Marta starts again at the intro and indexes as she reads, guiding herself by chapter titles and subheads as well as chapter introductions and conclusions, and then paragraph by paragraph, since there is usually at least one indexable element in each. She highlights all potential entries and subentries.

Before she starts indexing, Alex makes bookmarks for all headings, chapters and sections and makes entries for them in the index almost verbatim, similar to Fred Liese's method. She colour-codes these entries so she can identify them later, as they will not be left as is. As she works through the chapter, she changes or replaces these entries with appropriate subentries, adding entries for content in the chapter that doesn't fit neatly.

### **Labels**

Pierke uses labels extensively, so that her index looks colourful by the end. She uses six labels for every index to mark entries for later review. She uses macros that allow her to touch one button on her keyboard to create the label. She can then go back to that entry later when reviewing and editing the index. For a multi-authored collection, she uses consistent subentries like *chapter by*, *about*, *referenced*. Alex also makes extensive use of coloured labels. Marta doesn't usually use colours but rather bolds any terms or entries that require further attention.

### **Editing the index**

Pierke usually spends two to three days on editing at the end of the project, the maximum she has available. She sometimes gets larger books of 500-600 pages, in which case she edits as she goes along, because it would take a complete week for editing these texts.

Marta edits both as she goes along and then again once she has transferred the files to RTF or Word, because she acquires a different perspective viewing the index as an index. She edits this version during back-and-forths with authors.

Once Marta has completed the rough draft and edited it, she checks it against ASI's index evaluation checklist at <https://asindexing.org/about-indexing/index-evaluation-checklist> and the page on criteria used for indexing awards at <https://asindexing.org/about/awards/asi-indexing-award/#awcrit>.

### **Discussions with authors**

Mary noted that some authors want to engage with the indexer, particularly first-time authors who have questions about the indexing process and decisions. Earlier in her career, she spent time explaining her choices, such as why certain terms weren't indexed or why some entries had many subheadings, to clarify her approach. Now, she generally doesn't have a conversation with the author until the index is completed, unless there is something specific she needs to ask, such as something addressed in the introduction that doesn't feature elsewhere in the text.

Pierke is open to discussion after sharing her terms and conditions, to address any differences or clarify details. She also consults authors after delivering the index, especially about specifics such as the treatment of Arabic names.

### **Indexing unfamiliar subjects**

Alex noted that, in theory, everything needed for indexing should be in the text itself. Marta requests material early to give her time to prepare.

Pierke and Mary both observed that it can take longer to index unfamiliar subjects. When Pierke began indexing Middle Eastern and Islamic Studies texts, she had to invest time in researching the

topic, and her early indexes took more time. As her expertise grew, her speed (and fees) also increased.

Mary agreed that indexing unfamiliar material mainly affects speed. Her early indexes took longer but still hold up well; experience has since made her faster and more organized.

For trade books, subject familiarity matters less, but for scholarly works, it helps to know the key scholars and theories, as scholarly texts are in conversation with other authors and works in the field. Indexers can gain this knowledge through research or by consulting the author. Jola Komornicka mentioned that the *Oxford University Press Very Short Introductions* series offers concise overviews of scholarly topics.

Different terms for the same concept in multi-authored works must be handled carefully, because although similar, the terms may convey different meanings or nuance. The term that an author uses in the text must be used to index that author's work, and then cross-referenced to the terms used in other articles. Authors don't want their work indexed only under another author's term!

Names in scholarly books are important, and often indexers can't tell whether a name is a passing mention or indexable. One strategy is to add most names to the index, as it is easy for the author to go through and remove names if necessary.

Jola commented that it's important to know the big names and ideas in any given scholarly area, because they may seem like passing mentions to an indexer without specialized knowledge but to the audience and author those names and ideas are critical.

### ***Don't be afraid!***

Both Pierke and Mary talked about the doubts indexers face early in the project. Pierke noted that she still doubts her own ability to make a good index when she starts a new book: every new book and every new index is difficult to get into in the first days. But once she has the structure and is about halfway through the book, she starts thinking, "I can do this." Mary also noted that when you start a book, especially scholarly works, even with an author you worked with before or a subject you've indexed, there will often be a moment when you lose track and can't imagine what is going on. But you build confidence as you go through the index, and that doubt passes. These comments were greatly appreciated by some members who felt reassured that others also have moments of doubt early in the process.

Once again, we'd like to thank our panelists, Alex, Mary, Pierke and Marta, and our audience.

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