What is markup: Marking up simply means physically marking the text you are indexing to indicate your entries in some fashion. Some people use very light marking up--such as just highlighting names or putting in only the main topic for that page span. Others use marking up a lot more.

Why does it need defending? It doesn't take long for any gathering of indexers to light upon the topic of marking up. Some use it heavily; some NEVER do. Both think they are right. And they probably are; what is right is what works for YOU as an indexer.

Speed: The biggest criticism of marking up is that is slows people down. This may be so for some projects, especially highly structured documents like textbooks or cookbooks. But for complicated works like monographs on inter-nested subjects, it saves time overall because it allows me to get a grip on the entire book before I start entering terms.

Advantages:
- Clearly identify start and stop points of a discussion
- Clarify thoughts/understanding of the metatopic
- Find ancillary themes and topics
- Ability to return to discussion
- Manage notes
- Ergonomics
- Facilitate the use of typists

Clearly identify start and stop points of a discussion: Perhaps the top reason people mark up; some people only mark up main points.
- Regular spans (80-89)
- Differentiate between continuous and non-continuous discussion (115-116 vs. 115, 116)
- Don't use a starting page number for embedded books
- Mark end of discussion (I use a line under the paragraph), especially in embedded books
- => to indicate discussion goes to end of chapter

Clarify the metatopic: My understanding changes as I go through the text.
- The metatopic may be clearly stated by the author, mis-stated or not stated at all
- Adjust for overindexing, especially in the first chapters when still wrestling with the metatopic
- Sometimes section heads are misleading

Find ancillary themes and topics:
- The TOC and intro often do not indicate this info; only found by going through the book and seeing patterns in the coverage
- Book-specific abbreviations are useful here. Doesn't have to be perfect wording; use a "placeholder" phrase until entry/editing.
- Double posting vs. cross posting decisions; can change mind later if they are well marked
- Capture the overall concept, the wording can change

Ability to return to discussion
- Especially useful for embedded indexing where you may feel lost
- Allows closer/easier reading than on a screen

- Clarify length and relative importance of the local topic to that of the whole, especially when dealing with electronic text files

Manage Notes
- Highlight note number in text
- Mark notes for those needing analysis when press only wants significant or new discussion

Ergonomics: Helps with eyestrain and getting out of your house

Facilitate the use of typists: Needs good handwriting and complete phrasing

Techniques: Use whatever form works for you; here are mine:
- *Main entries*   box text
- *Sub entries*   use carat and underline SE text   ^_____
- *Marginal entries*   underline only if not sure of keeping/label   _____
- *Marginal spans*   square brackets   [ ]
- *Double posting*   use dbl or x2, x4, etc
- *Names*   use double underline for sort   David Smith Jones
- *Cross posting*   xp or See with arrow indicating target

Abbreviations: Create general ones for ones you use all the time:
- @   about
- adv   advantages
- def   defined

Create specific ones for each book:
- t & t   time and temporality
- PI   preliminary injunction
- JR   Rosenfield, Joe
- "   use ditto marks to reuse abbreviations on same page

Miscellaneous Tips:
- Use colored ink that contrasts with the page
- Mark text queries for author, I use a circle to differentiate from the box
- Spelling doesn't count, unless you are using a typist.
- Can adapt to a iPad or tablet
- Find what works intuitively for you; that is the key to efficiency

When Not to Mark Up:
- When the book is highly structured and non-narrative, such as cookbooks or encyclopedias.
- Database indexing
- Name indexes, unless using a typist

Disadvantages
- Uses paper
- Speed for those people who have no problem working directly to entry