

# ISC/SCI Virtual Conference 2022

## “From Data to Done” Workflow Panel

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May 13, 2022

### Preliminary Notes

- Normal for indexing process to change over time. Also perfectly acceptable to stick to what works.
- Be self-aware and reflective, especially about how your skills are developing, as well as the needs of different types of projects.
- Make changes, if any, at your own pace and according to your own needs.
- Try paying attention to patterns, in the text and the index.
- My process is for a regular back-of-the-book index, created in Cindex. I currently don't write embedded indexes.

### My Current Indexing Workflow

1. Open PDF and create a new Cindex file. Line these up side-by-side on my computer screen.
  - For regular clients, create Cindex file using a template.
2. Review the indexing specifications for the client/publisher. (See example below.)
3. Review project notes, and keep notes handy in a separate window.
  - When I accept a new project, I create a note in the Notes app (for Mac). This functions as my external brain. It includes all of the project details (title, publisher, contact person, quote, etc...), queries for the author, and notes for myself as I index. (See example below.)
4. Preview the text and create a plan for finishing the rough draft. This usually takes just a few minutes.
  - Review the table of contents and maybe skim the introduction to get a sense of the metatopic and the main discussions.
  - Figure out how many pages/chapters I need to index per day to finish the rough draft (while still leaving time for editing).
5. Write the rough draft.
  - I read the text and type up entries at the same time. If I am unclear on what a chapter or section is about, or if I want to determine if I should add subheadings, I will read a few pages ahead or do a quick keyword search, but otherwise I don't pre-read or mark up the text.
  - Focus is on understanding the text and capturing details and first impressions in the index.
  - A little light editing: double-checking locators for accuracy, skimming the page again to make sure I've picked everything up, cleaning up small errors and easy fixes. Otherwise, I tend to keep moving and resolve issues later, when editing.
  - Jot down notes, brainstorm, and queries, in the Notes app.
  - Highlight entries using labels, to guide my editing later on.
6. Edit the index.

- Begin with writing a brief summary or mind map of the book's contents. This clarifies the metatopic, main discussions, and how they all relate to each other. This also helps ensure that I haven't missed a significant discussion, and helps me to focus on the index structure and main entries.
  - Edit from the top down (A to Z). Review every entry. My goal is that once an entry is edited, I don't need to look at it again.
  - Focus is on fine-tuning the index. Check for:
    - Accuracy
    - Clarity
    - Relevance
    - Add or remove subheadings and cross-references as needed
    - Spot check locators
    - Spot check that all relevant references are picked up
  - Batch edits. In addition to editing from the top down, I may also edit similar arrays together, so I don't have to think again about certain topics. For example, editing the arrays for corporate tax, income tax, and sales tax together, even though they sort separately. Use a label to indicate what is edited, and then return to top-down approach.
  - Metatopic: if the metatopic array is challenging, I may edit this last, once I know what the rest of the index looks like.
  - Editing when tired: If tired, I may skip ahead to easier entries and save more difficult ones for the next day. Label/make notes to track what I've done/what is left to do.
7. Wrap up and submit the index. This usually takes 20-30 minutes.
- Step away for a few minutes to clear my mind. Shift from focusing on individual entries to seeing the big picture.
  - Run the "Check Index" function in Cindex.
  - Scan the whole index, to see if everything looks right.
  - Review cross-references.
  - Export index and scan the index again in word processor.
  - Check spelling in word processor. Duplicate any corrections in Cindex file.
  - Submit index, along with any outstanding queries.

## **My Former Indexing Workflow**

- When I first started indexing, I followed a two-step process of marking up hard copy and then typing the entries. This morphed to marking up a PDF and then typing up the entries.
- After 2-3 years, I stopped marking up the text. This was in response to:
  - Becoming better at anticipating how texts are written and how the index should be structured.
  - Receiving more job offers and wanting to speed up my process.

## **Scheduling and Timing**

- Ideally, I like having space between drafting and editing. In practice, I often start editing the day after I finish the rough draft.

- Prefer to work on one index at a time, which works out to about one index per week.
- If indexing two or more books at the same time, I usually have a primary project, which gets most of my attention, and then an easier, secondary project on the side.
- Rough drafts
  - Trade books: average 100-120 pages/day. However, for a 270 page book, for example, I will probably break the work over three days, 90 pages/day.
  - Scholarly books: average 50-100 pages/day, depending on the subject matter and density.
- Editing
  - Trade books: 1-2 days
  - Scholarly books: 2-3 days, or more for longer and/or more complicated indexes.

## Common Labels

Red: possible deletion

Blue: pay special attention when editing

Green: query the client/potential spelling error in text

Purple: editing complete

## Client Spec Notes (Example)

Keep it simple. Highlight what makes these specs unique. Only include information that is relevant to me.

- Sort: Letter-by-Letter (CMS)
- Format: Run-in
- Cross-references: See and See also (periods for both)
- Locators: Chicago abbreviation
- Include A, B, C letter headings
- Illustrations: indicate using italics

## Project Info/Notes Template

Again, I try to keep it simple, and to only include what is relevant.

Title/author:

Contact name:

Publisher:

Anticipated arrival/due date:

Page count/word count:

Quote:

Payment method:

Subcontracting:

Space for index:

Any special notes:

<Queries, notes to myself, brainstorm, summary, etc... all goes below>