Working with Indexers: What, When, Where, Who, Why, and How

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I have been working as a professional free-lance indexer for several years. Experience has given me an understanding of and appreciation for what a science editor needs in an index. When I was starting out, I often wondered whether I had asked the editor all the necessary questions that would enable me to deliver a high-quality index. As a science editor in need of an index, you too may have wondered whether you have collected and passed on all that is needed by an indexer working on your projects. This article, in question-and-answer format, is designed to address questions that you, as an editor, might have in working with an indexer.

We learned in journalism school that a good article should cover the what, when, where, who, why, and how of the subject being written about. This article is structured accordingly.

What can an editor expect of an indexer?

Expect familiarity with various indexing and editing standards. Like any industry segment, indexing has a set of standards and guidelines published by various worldwide standards organizations and other institutions. Some titles that come to mind are American Standard ANSI/NISO Z39.4-199x, Draft 3, British Standard BS 3700: 1988, and *The Chicago Manual of Style*. The National Institutes of Health has developed a controlled-vocabulary database, MeSH, that is used by editors of journals and books all over the world. Many pub-

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lishers incorporate these standards by reference into their own guidelines. As an editor you may reasonably expect an indexer to be familiar with various indexing standards and guidelines. You can also expect an indexer to be familiar with the editing symbols that are embedded in manuscripts and to have a basic understanding of the publishing process.

Expect the indexer to use dedicated indexing software. On an intellectual level, an indexer's job is to come up with terms for an index that a reader is most likely to look for when trying to locate information. After selecting the terms, an indexer must organize them in alphabetical order, whether word by word or letter by letter, to meet an editor's guidelines. Software can't help with term selection, because it is an intellectual task that requires reading and understanding of the subject matter. But when it comes to arranging the selected terms in a final formatted index manuscript, an indexer must use software that is designed specifically for indexing. The software takes as input the terms that an indexer enters, and it produces a sorted and formatted index manuscript on the basis of options selected for the particular index. Several software packages are used by indexers. Some of the more popular ones are CINDEX, Sky Index Pro, and MACREX.

Expect basic office equipment and Internet connectivity. Basic office equipment—such as a fax machine to receive last-minute changes in manuscript pages, a personal computer to compose and format the index, e-mail for communication and submission of text, and Internet access for research—is no longer a luxury, but a necessity. Although most freelance indexers run their businesses from home, it is reasonable to expect them to have a fax machine, a computer, and Internet access.

Good indexers may often surprise you with feedback and comments. For exam-

ple, an indexer may compile and submit an error report on the manuscript that identifies issues that an editor, proofreader, or copyeditor normally handles.

What can editors do to work effectively with indexers?

Identify the style guide for the project. A team can be more effective when expectations and deliverables are clearly identified at the beginning of a project. When assigning a project to an indexer, the editor should identify the index style guide to use. If your publication has an index style guide, be sure to include it with the manuscript sent to the indexer. If you don't have an internal style guide, refer the indexer to one of the industry standards. In my experience the index style guide in chapter 17 of *The Chicago Manual of Style*, 14th edition (1993), is used most often when no in-house guidelines exist.

Specify index length. It is very important for an indexer to know how much space you have reserved for an index. The page size, the font type and size, the line spacing (leading), and the maximal number of pages available for the index all have a bearing on the number of entries that an indexer should generate for the index. An editor will also have to tell the indexer whether to index the front matter, footnotes, appendixes, illustrations, and back matter. If an index has to be edited to fit an available space, indexers prefer doing the editing themselves so as to maintain the integrity of the index.

Negotiate assignment terms. Indexing usually occurs late in the publishing process. Consequently, indexers are accustomed to receiving page proofs that are legible, complete, and final. If you expect the manuscript to undergo changes, such as renumbering of pages, while an indexer is working on it, there must be an understanding between the editor and the indexer as to the monetary consequences

of dealing with the changes. Incorporating text and pagination changes into an index can be time-consuming and can result in extra costs. When assigning a project to an indexer, negotiate such conditions as how the work will be paid for: by the page, by the number of index entries, by the hour, or as a lump sum. Manuscript changes are usually dealt with at an hourly rate and index preparation by the page. If the index is required very quickly, rush fees could apply.

When is it more appropriate to hire a professional indexer than to prepare an index yourself?

Consider hiring an indexer if the indexing project is complex. If I were to offer just one criterion to help you answer the question, it would have to be index complexity. Many books such as encyclopedic reference works and examination study aids present information in a structured step-by-step format that is consistent throughout. Such books are easy to index because subject headings usually make good index entries. Editorial staff can easily index such books in-house. When a thorough reading of the book is required to develop index terms in a creative format to address an audience that may be new to the subject matter, a professional indexer can help.

It is often thought that because authors are intimately familiar with their text and subject matter, they are the most qualified persons to generate the index. Two factors mitigate that thinking: Authors often lack knowledge of the indexing process, probably don't have dedicated indexing software, and certainly have not indexed dozens of books on similar subjects by other authors. And they are usually too tired after writing the book and are too close to the subject to devote the concentration and effort needed to prepare a good index. Under those circumstances, it is better to hire a professional indexer who is experienced in text analysis, can iden-

tify important concepts in the book, and impose consistency on the entire indexing process. Sometimes an author can produce a good index, but many authors are not well suited to the task.

Consider hiring an indexer if time is tight. When you have very tight deadlines and not enough hours in the day to take care of editing, proofreading, and project coordination tasks, a professional indexer can help you get out of the crunch. Many indexers thrive on tight deadlines.

Where can science editors find information on how much indexers tend to be paid?

One resource is the American Society of Indexers (ASI, *www.asindexing.org*). You can also consult fellow science editors who have worked with indexers.

Who is a professional indexer?

A professional indexer dedicates his or her working hours to producing indexes for publishers. Professional indexers have undergone theoretical training, such as the US Department of Agriculture's course in basic indexing, a popular correspondence course. College education in journalism, language and arts, and the subject area in which the indexer will specialize also helps. Most experienced indexers can index 60 to 80 pages per day. Then they spend a couple of days in editing and polishing the index. They are usually members of ASI.

Why hire a professional indexer for a project?

Professional indexers have undergone training and honed their skills in text analysis, ability to identify important concepts, consistency in cross references, double posting (for example, inclusion of both "Cats, Siamese" and "Siamese cats"), and index format. They can structure conceptual patterns and complexities into useful headings and subheadings. As noted before, they can also save you time.

How do you find appropriately qualified indexers for scientific materials?

ASI publishes a directory called *Indexer Locator*, which is distributed free to editors and publishers who use the services of indexers. To ask for a copy, send or fax a request on your company letterhead. The directory lists indexers in the United States by subject, language specialty, and geographic location. It also includes a personal statement from each indexer to help you identify the one most appropriate for your project.

ASI also runs several special-interest groups (SIGs) of indexers. One is the science and medicine SIG; it has its own Web site (*www.scimedindexers.org*) and an online indexer locator. When at the SIG's Web site, click "Find an indexer" to display a search screen that lets you locate an indexer by specialization, language, location, or name.

How can one assess whether an indexer has done a good job?

ASI maintains an index-evaluation checklist on its Web site. The checklist can be found by clicking "Resources for Editors & Authors". It addresses such subjects as reader appropriateness, main headings, subheadings, double posting, locators (page numbers), cross references, length and type of index, and format.

Closing Comments

Once you find an indexer who works well with you, provide feedback at the end of every project and take the time to explain issues important to you. Doing so can help ensure that future indexes meet your specifications and expectations.