It was wonderful to catch up with fellow indexers at Heartland’s Spring 2015 meeting in Richmond, Indiana. Small business consultant Larry White gave a workshop on applying business practices to our particular niche of freelance indexing (read about it here), and Sue Klefstad demonstrated embedded indexing with WordEmbed (her summary is here). As always, we enjoyed great conversation and came away with lots of practical ideas to improve our indexing and our businesses.

During our business meeting, a big topic of conversation was programming and attendance. Cathy Seckman will be planning our fall program, and, if you hadn’t heard, the 2016 ASI national conference will be held in Chicago (dates to be announced). We are looking at ways we can support the conference as a chapter, and we’ll keep you posted. Cathy has also volunteered to be our membership liaison (a.k.a. Sunshine Lady) to welcome new members and to help us keep in touch a little better. Watch for her updates on the email list. Thank you, Cathy!

Marilyn Augst is diligently organizing and storing our archives. If you are a past officer and still have old records or newsletters, please let her know. Thanks, Marilyn!

Our online election ran through June 10th. Officers for the upcoming year are Carol Reed (Sr. Co-President), Mary Peterson (Jr. Co-President), Devon Thomas (Secretary), and Margaret Hentz (Treasurer). Many thanks to Sue Klefstad for serving as President and to Mary Peterson for her work as treasurer.

Margie Towery will continue her Best Practices article series in the fall. She’s had her hands full polishing the manuscript for her upcoming book, Ten Principles for Creating Better Indexes. Congratulations, Margie!

Other important thanks go to Roseann Biederman for joining the newsletter team, and to Sue Klefstad and Cathy Seckman for their work on the nominating committee.

Hope you all have a wonderful summer, and I look forward to what the next year has in store for us.
Maximizing an Indexing Business

By Carol Reed
Spring 2015

At our spring meeting in Richmond, small business consultant Larry White led a workshop on business practices for indexers. Larry has been a small business advisor with the Indiana Small Business Development Center and currently teaches business classes at Indiana Tech. The workshop gave practical tips that can make a big difference in how much we earn and how satisfied we are with our career choice.

Larry started out with a review of the basic business concepts that affect our bottom line:

**Gross profit** = sales revenue – cost of goods sold ($0 for us indexers)

**Net profit before tax** = gross profit - operating expenses

Our business finances boil down to maximizing revenue and controlling expenses. We then looked into how these basic business practices play out for indexers. First, we considered ways to maximize revenue.

The Pareto Principle, also known as the 80–20 rule, suggests that around 80% of effects come from 20% of causes. For indexers’ revenues, this means roughly 80% of our income comes from 20% of our clients. If this is the case, indexers benefit by taking good care of the top 20% of their customers. We discussed ways we can develop those relationships, communicate regularly, differentiate ourselves, and express appreciation for our top clients. While innovative marketing schemes are appealing, we agreed that we get a lot of mileage out of occasional emails and holiday cards IF we take the time to send them.

We can also expand our revenues by reaching new customers, and then converting some of the initial contacts into paying jobs. In addition to contacting publishers we discover online or through Literary Marketplace, we agreed that LinkedIn is becoming an important resource, especially for the younger editors we work with. Optimizing our ASI Indexer Locator listings is also well worth the time it takes. Connie Binder’s webinar, “How to Increase Your Business Using the Indexer’s Best Secret Marketing Weapon,” was recommended as a great value at just $20 for ASI members.

Larry’s third tip for expanding revenues is creating and tracking a marketing outreach plan. When we talk about reaching new customers, what does that really mean? If we hope to gain three new clients, how many marketing touches should we expect to make? (Answer: Usually way more than we think.) If we track our marketing efforts, we’ll be able to estimate how many responses we can expect to receive from our introductory emails or calls. We’ll also be able to estimate how many of those turn into paying work. But first we need to put a specific plan on paper. How many marketing touches will I make, over what period of time? How will I contact prospective clients? How will I follow up? How much time should I plan to spend on marketing efforts? The Pareto Principle also applies to a freelancer’s division of work: it’s very reasonable to spend 80% of time on paying projects and 20% on marketing and building relationships. Once you have an idea of the numbers, you can work on increasing your response rate and conversion rate (“Should I rework my introductory email? Tweak my follow-up schedule?” etc.).

Containing costs and expenses is also basic business practice, but it only happens when we’re intentional about it. Making a budget and tracking spending give us the information we need to make good spending decisions. Larry also suggests figuring expenses as a percentage of revenues in order to analyze trends from year to year. We may make more money this year than last, but if expenses have grown, the picture changes. We can apply the Pareto Principle to expenses by keeping an eye on the top 20% of our expenditures.

The other key factor we have some control over is our hourly rate. Ideally, freelancers determine their hourly rate by factoring in their expenses, average hourly rates in the industry, and their pre-tax income goals. Whenever possible, it’s best to aim high, since there will always be variables that pull the hourly rate down. Realistically, indexers don’t have a lot of latitude in the rates they can charge; we need to stay competitive. But keeping track of our numbers—revenues, expenses, and hourly performance—enables us to tweak our processes.
proactively. A great resource for improving indexing speed is Kate Mertes’ webinar, “Creating and Maintaining Speed in Indexing.”

Larry closed with some other general suggestions for staying on top of our businesses:
• Reconcile your business checking account regularly
• Back up computer records
• Create and update a cash flow forecast
• Monitor accounts receivable and accounts payable
• Stay on top of estimated tax payments and tax records
• Consider retirement plans

To take these ideas further, Larry suggested working with a small business counselor or mentor through the Association of Small Business Development Centers (use their locator to find offices in Illinois, Indiana, Kentucky, Michigan, and Ohio). SCORE also offers free counseling with retired business professionals.

The challenging part of all of this is the discipline of looking at this stuff regularly, in the midst of work deadlines and life’s demands. Think of it as a monthly business meeting with your boss. Larry suggests reviewing the following each month:
• Who are my top-20% customers?
• When is the last time I contacted them?
• How many marketing touches have I made with prospective clients so far this year?
• What has my response rate been so far?
• How many of those responses have translated into bids or work?
• How do this year’s expenses compare to last year’s?
• What is my expense/revenues percentage? How does it compare to last year’s?
• What is my target hourly rate?
• How close have I come to my target hourly rate on my recent projects?
• Am I staying on top of my banking, records, invoices, bills, and taxes?

Both new and established indexers came away from the workshop with the tools and the motivation to take charge of our businesses. Our thanks to Larry for a great presentation! If you’d like to work with Larry directly, you can reach him through LinkedIn. ■
Embedded Indexes: A Trend in Indexing

By Sue Klefstad
Spring 2015

The content published in a print book may also be published on CD-ROM, on a website, or in a format we’re not yet aware of. To handle this repurposing, publishers are increasingly embedding book indexes into the Word manuscript documents so that the index marks are associated with the text and not with a particular publishing format.

The index is considered “embedded” because the index entries are fields that can be “turned on or off,” that is, viewed or not seen at all. Therefore, the index is buried beneath the surface of or embedded within the text.

Why embed an index? If a work is going to be updated often, an embedded index can be regenerated quickly. If the document will be displayed online, it’s fairly easy to convert the index entries to links. Embedded indexing works well for custom publishing, where selected chapters are chosen from a book and perhaps combined with chapters from other books.

If you are considering writing an embedded index, I offer one suggestion: Use the James Lamb utility WordEmbed. The WordEmbed utility allows you to use your indexing software (Cindex, Sky, Macrex) to index in the usual manner: You can see the index grow; you can take advantage of your index software tools such as entry autofill, cross-reference checking, and the maximum page number allowed; and you can edit the index as usual. This results in a higher quality embedded index.

Let me give you a taste of embedded indexing without the WordEmbed utility so you can appreciate the ease of using the utility: To mark an index entry in Word “by hand,” click the cursor into the text associated with the entry, bring up the Mark Index Entry dialog box, type in the main entry and subentry heading text, and click Mark. What you’re doing is inserting a field that contains the main entry and subentry heading texts, so you could copy and paste the field, altering the heading texts as necessary.

The Mark Index Entry dialog box can remain open to make the process more efficient. If text is selected, then that selected text is put into the main entry field, saving some typing. An index field is placed next to the selected text, or the index field is placed at the cursor location, if there is no selected text. If you want to indicate a range of text for an index entry, first define a bookmark for that chunk of text, then in your Mark Index Entry dialog box select the Page Range Bookmark and hit the drop-
Indexer Lucie Haskins offers a PDF with screen shots of the process of inserting index fields. James Lamb wrote an article for the British Society of Indexers journal that explains the embedding process. In that article, Lamb captured the mirror-image nature of embedded indexing by contrasting conventional indexes, in which each *heading* has a collection of references indicating locations to which the heading refers, against embedded indexes, in which each *location in the document* has associated headings.

Okay, this process of hand embedding doesn’t sound too bad—until you actually do it. For the entire length of a book. Then you understand the indexer estimate that embedded indexing takes three to five times as long as conventional indexing (see the Lucie Haskins PDF referred to earlier).

The current versions of indexing software provide another approach to embedded indexes: their drag-and-drop capability between the indexing software and Word documents. The index is written and edited as usual, then displayed in page order. Each entry is dragged to the proper location in the Word document; when dropped, an index field is created for that entry.

Now let’s see how embedded indexing works when using the James Lamb WordEmbed utility:

I keep my indexing software window side-by-side with my Word document window. I can select the text in the Word document or simply click the cursor, then hit the keyboard shortcut of Control-Shift-backslash (Ctrl-Shift-\ or Ctrl-\). This puts a comment into the Word document. The comment contains a number, which was also placed on the clipboard. In my indexing software, I enter the main heading and subheading—taking advantage of autofill—then paste the clipboard contents into the page field.

If you need to enter this number again later, it can be copied to the clipboard from the comment balloon or it can simply be typed in. The number consists of the current Word document page number, then a period, then the line number of the beginning of the selection. The final digit differentiates multiple markers on the same line. When the index is embedded at the end of the process, this number in the comment field matches up with the index entry to be embedded. With a click, these comments can be removed before the file is delivered.

Indexing then becomes a natural rhythm of marking the text electronically, hitting the keyboard shortcut, and creating my index entry in my indexing software. A range of text can be indicated in a number of ways, all intuitive. I enjoy the visual nature of WordEmbed. The toolbar has a Go To Locator tool that moves you to the location of the entered locator number. You know the exact text associated with that locator; there’s no need to reconstruct which text on the page is being referred to. This aspect makes editing a joy.

And editing can follow its full path: Use your indexing software cross-reference tool to verify all the cross-references. Run up single subentries. When deciding if
subentries can be combined, it’s a big help to easily know the exact text being referred to.

When you are happy with the edited index, the index is written to RTF with an equal sign (=) marking the subentries (easily achieved). Click on the Embed Index tool on the WordEmbed toolbar, point to the RTF, and watch WordEmbed work through the document, putting in the index markers. The index appears at the end of the document.

Be aware that Word hangs its main entry See also cross-references off the main heading text. The WordEmbed utility is able to put these See alsos as last subentries, which gives cleaner main headings that are more easily scanned by the index user. I currently hesitate to do this. My main embedded index client sends out to index writers instructions for hand-embedding in Word (along with a document that suggests using index cards), so I am assuming they are most familiar with the Word default cross-reference positioning.

However, you must set your indexing software to hang main entry See also cross-references off the main heading. If you set your software to put the cross-references as the last subentry, Word will eat all of the cross-references during the embed process: *poof* They’re gone.

I strongly encourage working with the book as one Word document rather than separate chapter files; though this is rarely an indexer’s decision to make, we can advise. If the book is sent as separate chapter files, then the indexer must ensure that each chapter is assigned a unique page range. The specific page range does not matter; it simply must be unique. Roman numerals for the front matter are not unique; the range of page numbers is what needs to be unique for each chapter, because the page reference numbers are based on Word document page number. Also, when working in separate chapter files, the cross-references must be suppressed (via a checkbox) for all chapters but one. If the book is one Word document, then the page ranges are not an issue, nor are the cross-references. In addition, it’s much easier to go to a specific locator when the book is one large document; you don’t have to figure out which chapter file the sought locator is in.

Now let’s talk about sorting, because Word determines the final sort order of the embedded index, not your indexing software, and in addition, there are special characters that need to be handled. Heartland member John Bealle wrote an excellent overview of Word sorting idiosyncrasies with Sky indexing software; you can find his PDF (“Notes on Using Sky with WordEmbed”) on our website in the Articles index.

In Word, the tilde character (~) around text hides that text yet the text affects sort. So putting ~000~ in front of an entry will force the entry to the top. Putting curly braces ({}) around text allows that text to show without it affecting sorting. So {The }Book Title allows “The” to show yet the entry sorts under “Book Title.” That’s straightforward enough, except that you need those special characters to survive export to RTF. In Cindex, this means that a backlashslash needs to be placed in front of each tilde or each curly brace: \{The \}Company She Keeps. Curly braces are required when you want minor start words to be ignored in subentry sorting: \{as \}neutral or \{of \}children.

A colon is a special character in Word embedded indexing, separating entries and subentries. So if you need a colon in an entry, such as for a subtitle, it needs to be ignored by Word by being placed in curly braces (the space after included), and those curly braces need to be backslashed to survive export to the RTF: \{The \}Therapy of Desire\: \}Theory and Practice in Hellenistic Ethics.

Double quote mark are apparently very special characters in Word embedded indexing, because in Cindex it takes many backslashes with curly braces to get Word to treat them as simple double quotation marks: \\\\"\}Discovery\}\\\\\\". I find it easier to just enter double quote marks as I’m gathering entries, then do a replace of \\\\" for every quote mark when I’m finished gathering entries.

I back up my Word files often. When I finish gathering entries, I back up that version of the Word embedded file. Then I copy it to a “junk” directory, into which I put the exported RTF from my indexing software and do an embed of the index to check for errors. One potential error is mistyping a reference number from the comment balloon; WordEmbed notes the errant number to an error document. The embed process can have problems if Word is not happy with a selection. For example, a selection of text before a table and then only part of the table may make Word unhappy. A new selection of the entire table or a portion fully within the table needs to be created, and the page references replaced in the index file. And of course there may be sorting issues.
Every time I do an embed, I use a “fresh” copy of my embedded document; I don’t re-embed into a document that’s already been embedded into. This might be correct process or it might be simple superstition. Either way, it works. I do all but my final embed(s) in a “junk” folder on file copies so that I don’t affect my main embedded book file.

My embedded indexes do not take multiples of time longer to write than conventional indexes; I find the WordEmbed process to be very efficient. But I do find my final read-through of the embedded index to be time-consuming because of my personal insistence on re-embedding constantly throughout the process (because if it’s my final read-through, I want to be reading the actual final version).

So what about placement of index marks? There was an interesting email discussion about translation jobs in InDesign that mentioned the practice of clustering the marks at the beginning or end of the paragraph, so that the translator could swipe the paragraph text without disrupting indexing tag markers. My current practice is to mark exact text, putting many of my marks within paragraphs.

If you index on a Macintosh, you will need a PC simulator to run the WordEmbed macro, and an Intel Macintosh to run the simulator. (Check About This Mac under the Apple menu to verify an Intel processor.) WordEmbed is a dot template file of Visual Basic code, so if you have other Add-Ins installed in Word, especially “amateur-written” templates, and experience any difficulties with WordEmbed, try uninstalling the other Add-Ins.

With the James Lamb WordEmbed utility, your embedded indexes will have the same high quality as your conventional indexing jobs. The utility is available for purchase on the Web, currently priced at $130.
Meet a Fellow Indexer: Lisa Ryan

By Roseann Biederman
Spring 2015

When Lisa isn’t indexing and abstracting books, she’s writing them. Since earning a bachelor’s degree in English, followed by master’s degrees in Writing and Publishing as well as Library Science, she has worked as a reporter, researcher, indexer, and abstracter—all while finding time to write novels and screenplays. In addition to running Stellar Searches LLC, “I have written two young adult novels and three screenplays, and I am working to get these published or produced,” she says.

Lisa began her career as a journalist, and credits her mother for the inspiration to change careers. “I worked as a newspaper reporter in my hometown of Staunton, Virginia, covering crime and courts before deciding to go back for a library science degree,” she says. “My biggest influence was my mother, who was a middle school librarian before retiring.”

While at the University of North Carolina at Chapel Hill, Lisa landed an internship with the U.S. Environmental Agency, and a position as an Information Professional at the Center for Transportation and the Environment (CTE) in Raleigh. “With additional experience I gained in writing abstracts for the Environmental Research-in-Progress database at CTE, I was able to branch out into indexing,” she says.

After earning her degree, Lisa worked in Washington, D.C., as an indexer/abstracter for the National Association of Home Builders, and then as an indexer for the U.S. Department of Transportation. She founded and developed Stellar Searches LLC in 2007, focusing on researching and online searches, and then expanded into indexing and abstracting. She joined ASI shortly thereafter.

Lisa focuses on back-of-the-book, periodical, newspaper, and database indexing, and her specialties include science and technology, social science, education, and scholarly works, but she is open to indexing a variety of topics. “I particularly find art history interesting,” she says. “One book I indexed, Science and Art, was truly fascinating, as it explored the great masterpieces of art using obscure scientific techniques. I also learned much about LEED, Leadership in Energy and Environmental Design, by indexing a series of green building books.”

While her favorite part of indexing is learning about new subjects, Lisa admits that the most challenging aspect of the job is finding new clients. To that end, she utilizes the ASI and Heartland Chapter websites, including the ASI Indexer Locator. “I find the newsletters and discussion lists to be useful resources and networking tools. I’m also a member of the Periodical/Database Indexing Special Interest Group, and monitor the Indexers Discussion List and INDEX-L,” she says.

Lisa lives with her husband, Stephen, near Lexington, Kentucky—“in bluegrass country. We enjoy going to horse races at Keeneland,” she says. In addition to creative writing, she spends her free time drawing, watercolor and oil painting, and gardening. For more information, contact Lisa at www.stellarsearches.com.