Indexing in the Heartland

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Fall 2012 Meeting Recap
By Meridith Murray

The Heartland Chapter of the American Society for Indexing met at the MCL Cafeteria in Richmond, Indiana, on Saturday, October 6, 2012 from 9:00 AM until 4:30 PM. There were thirteen Heartland members in attendance, in addition to Diana Witt, our keynote speaker. This was an excellent meeting: there was a lot of good synergy, and everyone went home inspired and energized. We missed several members who are generally regular attendees, and we hope to see you all in the spring.

Diana Witt traveled from Marietta, Georgia, to give an outstanding presentation on time management and managing large projects, and Heartland member Sharon Hilgenberg shared her interesting and thought-provoking talk, “Who Are You Talking To?” (see related articles on each of these elsewhere in the newsletter.) Diana’s talk was particularly germane, as Marilyn Augst had recently finished a huge project for which she recruited several other Heartland members, and Marilyn’s experience and perspective complemented Diana’s comments nicely.

As informative and timely as both of these presentations were, some of our most valuable and productive time occurred when we were able to talk informally as a group and share our experiences and ideas with each other. This was one time when having a smaller group was beneficial, as we were all able to sit around one large table and have a true “roundtable” (well, okay, it was square, but still…) discussion.

One topic of interest to everyone was marketing and how to find new clients. It might be time for another meeting devoted to this subject, as it seems that many of us are still trying to boost our business and find ways to prospect and network. We also shared some horror stories and cautionary tales about our indexing experiences, some of which might find their way into future articles.

During the business meeting, we heard the minutes from the last meeting as well as the Treasurer’s report. Marilyn Augst and Shelley Quattrocchi spent the summer making revisions to our bylaws, and we voted to approve the new and improved version.

The best part of the day was our 20th birthday celebration. Happy birthday, Heartland Chapter! Diana Witt commented that not many other chapters have had such a long and continuous span of operation. This is a real testimony to the tenacity and determination of Heartland indexers. Sharon Hilgenberg shared with us that she was a founding member. I am impressed! We had delicious cake, courtesy of senior co-president Margaret Hentz, and drawings for door prizes supplied by Margaret Hentz and Cathy Seckman. Thanks, Margaret and Cathy! Also, all members in attendance were able to take home Heartland notepads.

We discussed our upcoming spring meeting, which will tentatively take place May 4, 2013, so that members who
attend the national conference can report on their experiences there. Margie Towery will lead us in an exercise in index evaluation. This meeting will take place in Indianapolis; more details will follow, but plan to be there. This should be a really excellent experience for everyone. Margie has given much thought to the evaluation process, and we look forward to her sharing her ideas, suggestions and conclusions as well as her considerable experience with us.

Thanks to everyone who contributed to the success of this meeting, and I look forward to seeing you all in the spring. Until then, may your clients be cooperative and your indexes be interesting!

## 10 Time Management Tips from Diana Witt

**By Laura A. Ewald**

For anyone working as a freelancer, one major issue is always time management. Diana Witt, who describes herself as “very dedicated to the care and feeding of the indexing profession,” reminded us that the structuring of the 24/7 workweek for freelancers is far more challenging than a 9:00 to 5:00 job. And as freelancers, we have the added burden of not only doing the indexing but also managing the non-indexing time, which includes all those things the indexer needs to do to run an office and a business. Diana’s presentation at the Fall 2012 Heartland Chapter Meeting covered ten important areas of time management to consider:

**1. Planning:** It is difficult to structure an 8-hour—or any other length—workday. Diana suggests taking one night a week—usually Sunday, for her—and identify the non-indexing commitments for the week so you can structure a loose schedule around those commitments and then plan where the indexing commitments fit in. Every night she also plans for the next day—the work and not-work commitments—including the things that didn’t get done on that day. Invariably, the week-long schedule has to stay loose, but at least having the schedule helps to keep things from slipping through the cracks.

Diana identified two important time rules: "First, any time you have to get into the car, assume an hour is lost. If you have to travel more than ten miles, that will be at least 2 hours, and if you have a doctor’s appointment, hair cut, etc., always add an hour to your estimate. Second, if a real deadline crunch happens, like a repagination or a change in index deadline, you may have to cancel something from the non-indexing list."

You also have to really plan ahead for long trips and special occasions like family obligations or vacation. And by the way, Diana will not tell a client what she is doing in that time away but will simply say she is not available to do a job.

**2. Goal-setting:** Having goals increases productivity and actually increases work flow. Set both minor and major goals: Minor goals are actually sometimes more important than major goals, because as you reach them (such as completing a set number of pages by lunchtime), they can help your outlook. Major goals—for example, learning a new program or attempting new subject matter—can enrich your professional life.

It is very easy to overestimate how much you can get done in any time period, so have goals but be modest about them. Goal-setting is particularly important for the large, long-term projects—you need to set “mile posts” along the way, which can help avoid the pitfalls of stress and anxiety.

**3. Deadlines:** External deadlines are a big time management problem for freelancers, because they are completely out of our control and can change all the time. Building an extra two days into your deadline can help (e.g., the project is due on Thursday, so set your personal deadline as Tuesday). Turning projects in early can be good for creating a solid reputation with clients, so if you have an emergency someday, your clients will be more forgiving.
Big project deadlines can be scary, because you have to keep it all straight, especially with collaborative jobs, when other indexers work at various speeds, and you have to know how much time it will take you to put it together. And if you happen to be managing the project as well, you don’t always have all the work in hand at the beginning, or the client may not know exactly what they want. Be sure to build time into the project for conversations about the final product: emails, phone calls, etc. take extra time away from indexing. And be sure to schedule time away between writing and editing the index, so you can edit with fresh eyes.

Internal deadlines are those deadlines over which the indexer has some control and include non-indexing time (see #10 below), and personal commitments. Look at your life and work. Know what is important and schedule accordingly!

4. Setting start & stop times: Do you really want to work 24/7? It is a good idea to schedule down time (for exercise, meals, breaks) either strictly or loosely, because these are important. Routine is very important, too, so set a beginning and an ending to your work day to help fight procrastination, and know when to extend them for special circumstances. Structure your work life as much as you need to get the job done, and be sure to prioritize the time frame you have set aside for working.

5. Stress relief: Exercise, naps, reading, knitting, cocktails, “quick” breaks, laundry, watering the plants. Focus on the work is important, but so are breaks. You need to stop regularly and eat right. Nap if it works for you, but whatever it is, do something that will get you away from the screen for awhile. And rather than delaying the start of your work day to do “one more little thing,” build those little tasks into your work routine.

6. Time tracking: All of the indexing programs show time and date of entry creation, and this can be used to track what you are actually earning per hour to see if you are charging enough. As you start a new project and do the first 30 pages, note the time. Say you have worked for 1 hour, at about 4 entries per page:

- If it’s a 300 page book, you need about 40 hours to do it;
- Use the date/time stamp to figure out how many entries per hour;
- Try this at various times of day, so you can see when your most productive working hours are;
- Add extra time for a new client, because you don’t know, yet, the style and needs of their books.

7. Limit distractions: Turn off your e-mail, to start, and to see how you are handling other interruptions, try to track how long each takes. Insert notes in the index to remind yourself where you were interrupted, and learn how to manage them.

8. Use time-management tools: Keep track of when you are working, what you are doing, and for how long. Try using a timer, cell phone, or any other way you can think of to time what you’re doing when you work and take breaks.

9. Organization: Freelancers need to be highly organized! For e-mail, use folders or even automatic filing for incoming mail; on your desktop, use folders for individual indexes to organize your work. Keep your computer clean—empty and archive e-mail and indexes, back up your work, close unnecessary programs, keep your computer up-to-date, disable gadgets, and shut down anything that runs automatically that may slow your computer down.

10. Non-indexing time: There are an awful lot of non-indexing but work-related activities that require a freelancer’s time. Marketing and office management require keeping things up-to-date and proofed (resumes, references, work samples, websites, etc.). Invoices need to be created, sent, and tracked. Other time monsters include tracking electronic deposits, tax preparation, managing a retirement account, computer maintenance, work-related errands, conferences, courses, chapter workshops . . . it goes on and on! And more directly related to indexing, you need time for organizing e-mail folders; tracking flowcharts of pages received, work done, revised deadlines; e-mailing editors to keep up with projects, confirm pages, check page ranges and file sizes to make sure you got everything. And probably the most important of all, scheduled backup time for all of the above to avoid the disaster of a computer crash.

Beyond these ten points, Diana shared some words of wisdom gained from her years as a freelance indexer. “One of the problems about a home office is that it’s in your home. The dishes are dirty, and the bathroom needs cleaning. Except for taking physical breaks to stay healthy and doing some short tasks, house work is an after work activity. This is where every freelancer really needs help. If you can possibly afford it, consider a cleaning service twice a month. First of all, it will force you to organize and pick stuff up generally, so that the house doesn’t overwhelm you. It also makes it easier to say, ‘It’s time to work, the house can wait.’ If you can’t afford or don’t like help, make sure your housework time is completely separate from indexing time and be
disciplined about that. Did I mention that I never watch television? Where are the robots when we need them?"

But finally, don’t forget about you. There is life outside of indexing, so use these ten time management tips to keep your life balanced between work and play.

Useful online sources recommended by Diana:

FreelanceSwitch Productivity Blog: Includes some really useful articles including, “Prioritize To Do Items in Your Weekly Task Checklist”; “10 Ways to Eliminate Distractions”; and “Top 10 Free Time Tracking Apps for Freelancers.

30 Boxes is a web calendar allowing you to track several projects in one place.

Audience: Who Are You Talking To?

By Shelley Quattrocchi

Who are you talking to? This was the question posed by Heartland Chapter member Sharon Hilgenberg in her presentation about the audience of an index. Attendees shared their own experiences and questions about audience issues.

Sharon emphasized that freelance indexers cater to the reader, and it is important to formulate who that reader is.

There are several ways to find out who your audience is. First, look at the title. For example, if part of the title includes the words “for Dummies,” it is safe to assume that the audience for the book is a beginner in the book’s subject area. Another clue is in the front matter. An introduction or preface may specifically indicate to whom the book is directed. The first chapter is also a good guide in defining audience. Seeing bolded phrases sprinkled throughout the book is another clue that the book is directed at the beginner.

What do we do with this information? Write a description of who is reading the book. It doesn’t have to be long; three sentences are usually sufficient.

Although Sharon now formulates this description in her head, she started out by writing it down and suggested strongly that new indexers try this method.

Formulating a description of the reader—who is reading the book and how they are going to use it—can help an indexer guide his or her decisions on terminology. By preparing a description of the reader and thereby having a solid understanding of the audience, the indexer can readily explain to a questioning editor or author how decisions were made about what to include in the index.

Sharon also emphasized the importance of terminology lists and suggested listening to people who are well-versed in a subject, or auditing a class on a specific subject.

Sharon’s presentation reminded us what indexers are all about—getting the reader to the needed information. While the ensuing discussion showed that this is something we all think about subconsciously, Sharon encouraged us to rethink our own approaches to clearly identifying just who we’re talking to when writing an index.
Common Sense
Creating Better Indexes, Part 2
By Margie Towery

Common sense is one of what I call the “Ten Principles for Creating Better Indexes.” Those principles (or characteristics) are accuracy, audience and access, clarity, common sense, comprehensiveness, conciseness, consistency, metatopic and structure, readability, and reflexivity. While all of these principles are finely interwoven, it is possible to disentangle them a bit, examine what each means, and apply them to our daily indexing work. This is the second essay in a series in which I’ll briefly consider each principle, explore some related tools for the indexer’s toolbox, and provide some sources for further consideration.

What is common sense?

Webster’s Collegiate Dictionary (10th ed.) defines common sense as (1) “the unreflective opinions of ordinary people”; and (2) “sound and prudent but often unsophisticated judgment.” I take umbrage at that definition, to be honest, and I suspect Thomas Paine (Common Sense) might as well. I would define common sense as that sound, everyday smart thinking applied in any situation. It’s what we apply when we have something that’s not working (or working too well, in the case of a baby’s lungs), and we check the simple stuff first: Is the television plugged in? Does the baby have a wet diaper?

We must also, I argue, apply common sense to our indexing. But the common sense we should apply to indexing is balanced with the other principles noted above. Then our indexes will be examples of complex usability and simple elegance.

Term choices and natural language

One of the topics indexers like to discuss is bias in indexing, whether applied by a publisher or an indexer. Bias has to do with what terms are utilized in the index, particularly for main headings. Can the user find Controversial Issue A in the index? Or is it buried under some innocuous concept?

There’s a great story related to this idea in Nudge (Thaler and Sunstein). The director of food services for a large school district discovered that students’ choices in the cafeteria line were influenced by the placement of food. That is, if fruits and veggies were placed in front and closer to the students, while French fries and less healthy options were farther back and less reachable, students were more likely to choose healthier options. Thaler and Sunstein call the food services director a “choice architect.” They also discuss the wider implications of such choice architecture for individual choice, which makes fascinating reading.

What struck me about the concept was this: Indexers are choice architects!

We make choices in every word that goes into an index. We decide how something obscure might be made more accessible. Or not. It’s important to stop and think about the choices we make. Are they the choices that users might make as they search for something?

This all indicates to me that we should use natural, everyday (commonsense) language in our indexes. That is not to say that we should “dumb” our language down. Rather, we must be aware of jargon and translate it as much as possible, so our indexes are usable across a variety of audiences. That might mean using cross-references to get users to the jargon term (or brand-new term, in some cases) and/or providing some meaning in a parenthetical qualifier. Thus, as choice architects, we construct entry arrays and the encompassing index structure in a way that makes the information findable via a variety of routes.

How do we manage to do that? We digest (or analyze) the text. A simple regurgitation of the text into alphabetical order generally isn’t all that useful. I am not the first person to use the digestion analogy. In The Case for Books, Robert Darnton quotes William Drake (an avid reader from the mid-1600s): “The meat which we have taken, so long as it swimmeth whole in our stomachs, is a burden, but when it changeth from that which it was, then at length it turns into strength and nourishment. The same let us do in our reading books. . . . let us endeavor to digest and concoct them.” Thus, Drake argued for extracting the essence from books. As indexers, we digest the text and concoct the index.

Main headings

While we need to use the terms of the text as much as possible, we must often pull from outside the text for a
useful main heading to capture something from within the text. Natural language is key to maintaining the connection between the outside world of the user and the inside world of the text.

I’ve heard a few indexers insist that we must limit ourselves to using only the terms of the text. That is poppycock, to use a polite phrase. Index users, as noted above, come to the index from outside the text. That is, they are not likely to be steeped in the thought processes of the author. In other words, the index is the go-between to get users into the text.

In order to create the best possible main headings, it is also helpful to have a good general grasp of the main subject of the text (or metatopic). It’s not that experienced indexers can’t create a reasonable index for a subject that’s unfamiliar, but it makes a substantive difference for the quality of the index overall if the indexer has that basic knowledge.

**Subheadings**

Many techniques are applicable to creating subheadings that make sense, including the following three. First, the relationship between the subheading and the main heading must be absolutely clear. Consider this: “animals: hunting, xx.” Is this animals hunting prey? Or humans hunting animals? Obviously, it makes a big difference! That’s an actual example from a recent index review I did. And the meaning of the subheading wasn’t made any more clear from other subheadings, which included references to pets. To repeat, the relationship between the main heading and the subheading must be clear and instantly obvious to a wide variety of audiences. My sense is that if something isn’t clear, users will pass on to something else or give up altogether.

Second, subheadings should, as far as possible, have the most important word first, so that it sorts on that (aside from prepositions, etc.). Here’s another example from that index review: “Century Magazine: publication of Grant’s war articles” (there were other subs, too). The subheading introduces redundancy and buries the important name in the middle!

Third, indexers may also apply logic to the sort order of subheadings, whereby, for example, arrest and conviction come before execution. It doesn’t always work: birth, career, death, finances, illness. But it’s fun to play around with the wording and see how much the alphabet can work along with logic.

**Double-posting acronym-type entries**

Common sense is aptly applied to double-posting as well. Consider this entry: “EULEX (European Union’s rule-of-law mission), 246.” Best practice is to double-post all acronym-type entries under both the acronym and the spelled out name, unless there are subheadings, in which case a cross-reference points from one to other. In the EULEX case, though, double-posting was not necessary because it sorted right before European Union. So it’s common sense not to create an unnecessary entry. But the best practice is also based on common sense, to avoid sending users in search of an alternative entry when the handful of locators could simply be placed in both locations.

**When to break the rules**

Common sense applies to breaking the rules, and the EULEX entry is an example of this. However, indexers must have really good arguments for breaking the rules. In an index on cancer trial studies, I used acronyms as preferred terms (rather than spelled-out names). My argument was that the text was so laden with acronyms that people would very likely look first for the acronym in the index. In addition, the acronym as preferred term allowed diseases and institutional entities to sort together in a more logical fashion. But that’s not typically my practice, which is to use the spelled-out name as the preferred term.

For a book on ethnographic writing, the index was fairly straightforward with entries for memoirs, person, place, structure, voice, and so on. The text included a section on the writing process. For that one entry array, I force sorted the subheadings to maintain the process flow. Thus, I broke the rule for one entry array in the index in order to maintain the logical order.

**Reflections**

Common sense, though deprecated by its dictionary definition, is a key tool for indexers. It serves particularly as a balance to reflexivity and as an aid to clarity and readability. Common sense can also tip the scale when considering the best construction for main or subheadings and whether or not to create a double-post versus a cross-reference. We should apply common sense to create better, more usable indexes.

**REFERENCES**

Meet a Fellow Heartlander: Thea Teich
By Carol Reed

Remember the Y2K crisis? Thea Teich does. Clients of her then three-year-old business, Teich Technical and Marketing Communications, were among the many companies scrambling to avoid data loss when countless date fields would change from 99 to 00. Thea’s incoming jobs slowed drastically.

Around this time, she met indexer Alex Nickerson, whose husband Bob was an acquaintance of Thea’s. The two got to talking about indexing, and Thea immediately saw that it drew on the same skill set she had developed in technical publications. Having a background in diverse subjects (especially physical and biological sciences, environmental protection, and business) also seemed to fit the bill.

Alex agreed to show Thea how to index in return for assistance with her projects. Not long afterwards, as Thea’s existing clients regained their ability to move forward, Alex and Bob moved to the East Coast. Thea then joined forces with another independent communicator to do indexing and pre-publication projects for publishers. She also became an associate of Potomac Indexing. Since then, indexing has accounted for 25–50% of her total business. She especially likes to index business, scientific and technical subjects, and she also finds herself indexing a number of process-oriented books, such as training, teaching, and research methods.

Running her own communications business isn’t easy, Thea admits. Client delays, “feast or famine” workflows, and converging deadlines are part of the deal. “If you want consistency, a relatively smooth schedule, and the ability to leave work at 5 p.m. every day,” she says, “you don’t work independently.” But she likes the variety of projects and subject matter in her indexing and marketing work, along with the opportunities to keep learning and to meet other professionals with wide-ranging interests.

When Thea’s not working, she enjoys reading, knitting, exercising regularly, gardening, and attending wine tastings. She’s taken a number of wine-related trips, including a 2010 jaunt to Bordeaux and the Rhône Valley in France. Among her favorite memories are fine food and fine wines in the lovely Château Fombrauge vineyard*. Next on the list: Italy!

Much, much closer to home, Thea notes, the Ohio Valley region produces very good grapes and wine. In fact, she says, the U.S. wine business was at one time centered in the Ohio Valley and New York, long before California, Oregon, and Washington came to dominate the industry. For Heartlanders wanting to explore regional wineries, Thea’s picks include Kinkead Ridge (Ripley, OH), La Vigna (Georgetown, OH), Henke (Cincinnati, OH), and Burnet Ridge (Cincinnati, OH).

Research suggests that light-to-moderate wine consumption is associated with improved cognitive function, so maybe Thea’s on to something. Regardless, work and hobbies that keep us learning are something to celebrate. Cheers!

*We don’t currently have an elected office for Heartland Field Trip Coordinator, but if anyone cares to amend our bylaws, I heartily suggest we nominate Thea.

**The tax deduction possibilities for an indexing business are intriguing, though I’m not sure my accountant would see it that way.

Heartland Chapter Fall 2012 Newsletter
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Bestsellers in the Heartland
By Meridith Murray

Well, they may not be bestsellers yet, but they will be bestsellers, once the word gets out! The Heartland Chapter is proud to claim two published authors among its membership: Cathy Seckman, from Calcutta, Ohio, and Laura Anne Ewald, from Murray, Kentucky, are both fiction writers who know how to spin a great tale. If you want to take a break from indexing or have something to read as you travel to San Antonio for the ASI Conference, you should definitely check these titles out.

Cathy Seckman has published thousands of newspaper articles, hundreds of magazine articles and indexes, a few short stories, and two novels. Cathy identifies herself as a “part-time writer, part-time indexer, and part-time dental hygienist.” That adds up to someone who definitely knows how to manage her time. . . and time is what her young adult novel, Weirdo World, (CoolWell Press, 2011), is about. Weirdo World tells the story of a boy named Hunter from the present time who is accidentally transported back to the summer of 1963. For those of us who were kids in 1963, it's a trip down memory lane. Remember Jello cake? Stay-at-home moms? Buying groceries for a dollar, and getting change? We've come a long way since then, but kids will always be kids. It takes a lot of ingenuity, plus a helpful adult, to figure out what to do. This is a fun book, regardless of whether you lived through the ‘60s or only read about it in history books.

Cathy’s second novel, Bad Moon Rising, was co-written with two members of her writers’ group, Darlene Torday and Debbie Schukert. The three became indie publishers in October 2012 when the book went live on Amazon.com. The vintage murder mystery takes the reader from Woodstock to the Kent State shootings through the eyes of a group of college friends.

Laura Ewald is a former librarian turned freelance indexer and writer and indexer. An eclectic scholar with degrees in classical studies, drama, library science, and organizational communication, she is committed to the concept of “Everyman Theater,” bringing life’s lessons to the world via good storytelling, whether it is in the form of novels, plays, or puppet theater.

After years of writing and publishing for academia and professional journals, Laura has decided fiction is a lot more fun to write and has now published some of her novels. Her tag line is, “It’s all about Romance!” However, she says that she recently learned that what she writes is actually women’s fiction and not romance (which is apparently both more salacious and formulaic—who knew?) But there’s still plenty of romance, whether she is writing science fiction or more traditional literature. Her science fiction series, The Commonwealth Chronicles (CreateSpace, 2012), is so far a series of two, but that is just a start. Book One, The Stars of Dreams, tells the story of a science fiction writer who learns that the world she has been writing about is not necessarily fictional. Book Two, The Stars of Home, is actually a prequel to Book One, supplying a fascinating backstory and answering many questions. Science fiction meets romance, and it’s love at first sight.

Laura’s latest book, A Chance for Life, published by Tate Publishing in 2012, is at its heart a pro-life story but is also a very sweet tale of faith and commitment and an all-around good read. The protagonist, Sam Merrin, herself once an abandoned baby, is given the chance to save another unwanted, unborn baby by agreeing to adopt it, if the cynical mother will change her mind about having an abortion. In the process of carrying out this quest, Sam learns the true meaning of family. Spoiler alert: there is romance here also.

These are all books that you can enjoy and then share. The stories draw the reader in, and the characters are sympathetic as well as interesting. Both authors have an amazing ability to capture the mood of time and place and convey it convincingly and with conviction, whether they are writing about the not-too-distant past or a galaxy light-years away. Cathy’s and Laura’s books are available online from Amazon and Barnes & Noble. Support a fellow indexer, and give yourself a treat at the same time! For more information, visit their websites, LauraAnneEwald.com and cathyseckman.com. ■