



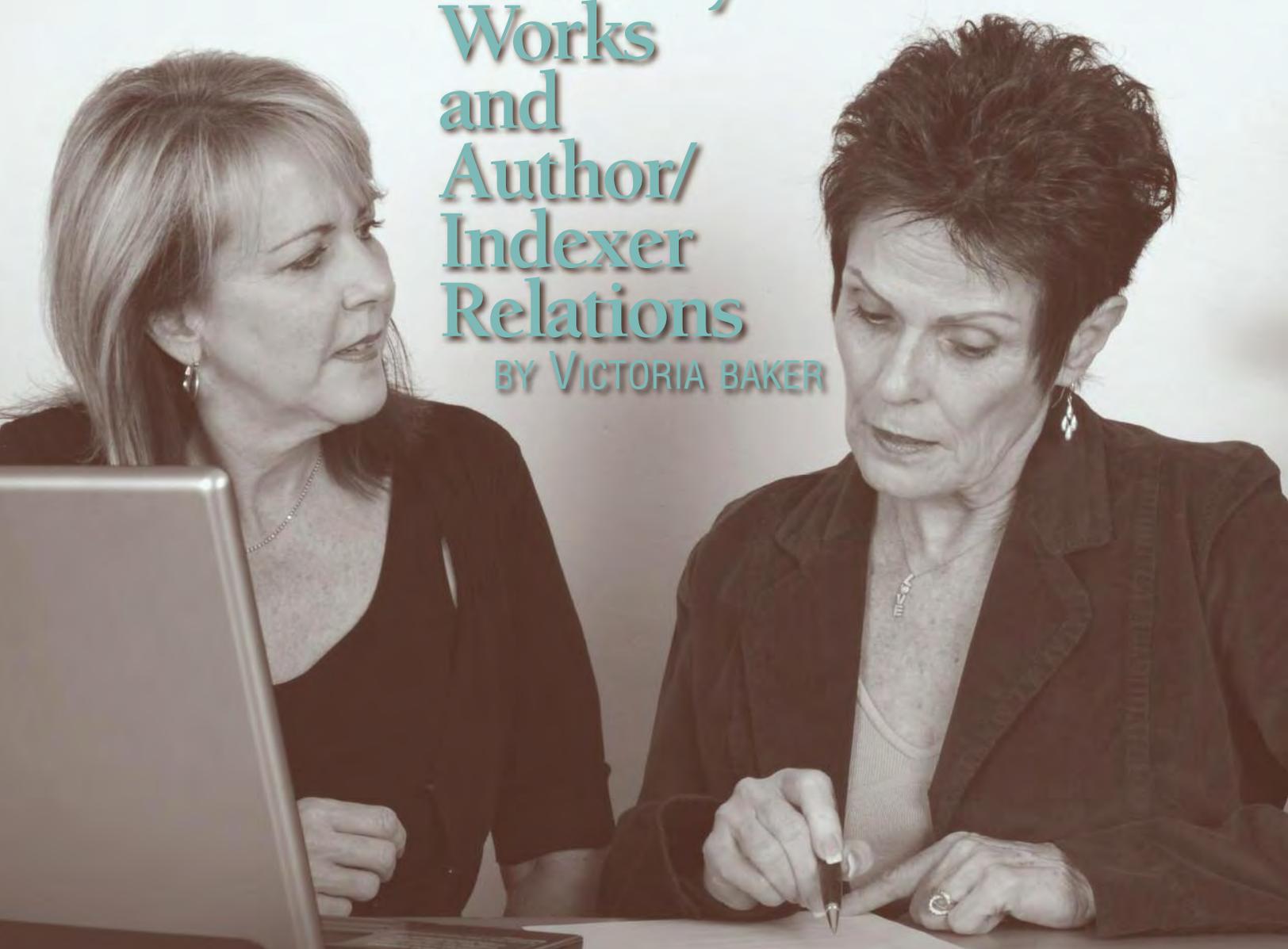
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Authors as Collaborators: Scholarly Works and Author/ Indexer Relations

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Repagination Projects: Knowing When to Walk Away and Knowing When to Run

(with Apologies to Kenny Rogers' *The Gambler*)

INTRODUCTION

I was introduced to repagination projects accidentally when a new-to-me client asked me to index a series of math textbooks for them. In order to familiarize myself with their way of doing things and about the upcoming projects, I asked my editor contact to tell me more about these projects.

She informed me that (1) the authors were very, very fussy, (2) that they had written the indexes themselves because they weren't satisfied with previous indexes that professional indexers had created, and (3) that these projects were just updates to existing textbooks.

I thought to myself, since the authors loved their indexes so much, why couldn't I just use the previous edition's index and update the page numbers? It would be a surefire way to please my clients. This seemed like an easy win-win situation. I just had to find out if repagination was the way to go. That is how my business of repaginating 5-10 math textbooks a year for this one client came about.

Since then, in the small community that publishing is, I've received repagination projects from other publishing clients because either (1) *the authors moved on to other publishers* and the authors remembered how pleased they had been with my work and therefore lobbied strongly for their new publishing houses to hire me for their new projects or (2) *my editor contacts moved on to other publishers* and remembered me for the same reasons.

Because repagination questions continue to crop up on the indexing discussion lists, I wanted to share what I've learned over the past few years in a manner that allowed me to develop the topic more substantially than I could as a reply to a discussion posting.

My intent is to provide as much detail as possible regarding my decision-making process along with the detailed steps I take during the repagination

process itself. Then you can decide for yourself if you want to dabble in this arena.

This process isn't for everyone. It can be tedious and nit-picky in nature. But it *will* appeal to some of you, just like it did to me. I love these projects! They provide an interesting respite from my other indexing work and, if I've screened them correctly, are relatively easy to work on.

I know there are always opportunities for process improvement and I'm no exception to that rule. I encourage all of you to digest what I'll discuss and adapt my methods to suit *your* work habits. In addition, if you find a great shortcut or alternative way of doing things, please let me know. I always welcome feedback on how to improve my work flow — doing so can only help me increase my overall efficiency and effectiveness.

WHAT, EXACTLY, ARE REPAGINATION PROJECTS?

Repagination projects do not change index structure or index entries (unless there are additions or deletions of material that impact the entries). Instead, only the locators (page numbers) are changed to reflect the material that has shifted between two editions or between different books in the same series.

But not all modified editions are created equally and therein lays the difficulty — knowing how to select the right candidate for your repagination projects.

Categories of repagination

Let me first identify some scenarios I've encountered in repagination projects over the years.

PREVIOUS EDITION OF THE SAME BOOK

This situation occurs when a book has already been written (it has at least a first edition) and the authors decide to update the material. In the textbook industry, this is a frequent occurrence. So, the question comes up, if the modifications have mini-

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mally disrupted the structure of the book, why not use the previous edition's index (if the client really liked it), and just repaginate the index?

This process isn't suitable for many categories of books but it can be quite satisfactory for textbooks and deserves consideration because of the relative ease of work and reduced time requirements.

CURRENT EDITION OF DIFFERENT BOOKS IN THE SAME SERIES

Repagination projects can also mean repaginating the **current** edition of **different** books in the same series. For example, you've created the new index for *Government in America* (30 chapters) for students on the semester system but the publisher also plans to use these same chapters in another book in its series, the shorter, 12-chapter version of *Government in America* for students on the quarter system. They would like you to also create the shorter index for that other book in the series.

COMBINATION OF BOTH METHODS

Some situations require a hybrid solution. For example, consider the publisher who has a series of math textbooks that are being updated. *College Algebra* (CA) is being updated and so is *College Algebra and Trigonometry* (CAT). CAT uses the exact same chapters 1-7 as CA. CA chapters 1-4 will also become CAT chapters 1-4. CA chapters 5-7 will become CAT chapters 8-10. And CAT chapters 5-7 will come from CAT's previous edition.

Time requirements

For the right repagination projects, I can average between 50 and 100+ pages an hour. Of course, I didn't start off with these efficiencies but worked up to them as my repagination process and overall indexing skills improved.

Pricing considerations

I've found that clients think repagination projects are very simple to do and, therefore, should command a much cheaper price. (After all, you just need to change the page numbers! What can be hard about that?) Establishing price usually means that I have to first educate my clients on how much is really involved in this process. I've found that, once I outline the complete process to them, they understand the effort involved. Now, whether or not they have money in the budget to pay what the project is really worth is another story!

I charge as much for repagination projects as I do for regular indexing projects because, while something may seem simple on the surface, it can get complicated very quickly, and because of the tremendous risk I take for encountering undisclosed or unknown issues I might have to contend with.

As I've worked with clients, they and I have gotten more sophisticated in our pricing structure breakouts. In the seven years I've been working on repagination projects, I've encountered three pricing structures to compensate the different work effort involved.

Often one project can involve all three pricing structures (and that makes for very interesting multiline invoices!).

MODIFY ENTRIES WITHIN AFFECTED PAGES (SAME AS TYPICAL PER-PAGE RATE)

This is defined at the chapter-level. Pages within this chapter have been modified from the previous edition so each chapter page will need to be investigated for differences between the two editions and then the page numbers for index entries will need to be adjusted accordingly (one entry at a time).

This work effort also includes deleting no longer needed entries (because the material was deleted from the book) or adding index entries to recognize new material added to the book.

STRAIGHT IMPORT FOR A FLAT FEE (ONE FLAT FEE FOR ALL WORK EFFORT)

This involves importing exactly the same index entries from the source index to the target index, with exactly the same page numbers. For the affected chapters, nothing changes between the two indexes. The contents are a straight copy from one index to the other. (For

example, whatever is on pages 114-195 in the source index is on pages 114-195 in the target index.)

REFOLIO PAGES (LOW PER-PAGE RATE; TYPICALLY 1/4 TO 1/3 THE MODIFY ENTRIES RATE)

This is defined at the chapter-level. The same concept as straight import (above) except the page numbers change between the source index entries and the target index entries. (For example, chapter 8 in the source book might be chapter 11 in the target book. The page numbers will need to be modified accordingly.) Page breaks *should* remain consistent between the editions of the text but it's wise to investigate more closely because subtle changes might occur.

Note: Straight import and refolio pages categories involve working with the **CURRENT** edition of indexes (between **DIFFERENT** books in the same series) while modifying pages involves working with the **PREVIOUS** and the **CURRENT** editions of the **SAME** book in the series.

DECIDING IF A PROJECT IS AN APPROPRIATE CANDIDATE FOR REPAGINATION

Now that you know what repagination projects are and that they might be financially rewarding, you need to know when to accept these projects and, more importantly, when *not* to.

Sometimes the client brings up the idea of repagination; sometimes it's up to you to suggest it for consideration. Here are some of the questions I ask the client to determine if this project is a suitable candidate or not.

Is there a previous edition to this book or does it involve multiple books in the same series?

If yes, then delve further.

How vested is the client in the existing index?

If they aren't really enthusiastic about the existing index, there is no reason for repagination. It's much better to start from scratch and create a completely new index. End of story and explain why.

However, you can still benefit from learning what specifically they didn't like about the previous edition's index and use that knowledge to create an index that removes all those deficiencies. Doing so, you'll be more likely to increase the author's and your client's satisfaction with your work product and potentially plant a seed in their minds that you are a go-to person and, therefore, a valuable commodity to have on their team.

On the other hand, if they were satisfied with the previous edition's index (in my case authors created the index and they loved it), then repagination is the way to go. They loved it before; you know they'll love it again, even if you might not.

What *exactly* has changed between editions?

Being able to **quickly** find the existing index entries on each page in the previous edition is paramount to a successful repagination effort.

I don't accept repagination projects if there have been extensive, structural changes to the book (where it seems as if the book has been totally rewritten).

To make repagination viable, the structure of the previous book needs to remain intact. To verify this is the case, examine the TOC (table of contents) from the previous edition and from the current edition.

Changes like the following are perfectly suited for repagination projects:

- Chapters retain the same structure as in the previous edition.
- Changes are at the section-level within chapters. Sections might have moved, been deleted, or added.
- Changes at the paragraph level are minimal.

- Changes to examples, artwork, etc. exist. (These are normally of minimal consequence.)
- The previous index was of normal density (average 3-5 index entries per page).

However, if you find that you cannot match up many of the following (between TOCs)

- chapters from the previous edition to the current edition
 - sections within each chapter (between editions)
- then this is a project that shouldn't be considered for repagination.

Trying to track the remaining pieces of the previous edition (without any clear roadmaps) will prove to be an extremely time-consuming and frustrating effort. Better to just start from scratch, perhaps using the previous edition's index as a review of what was considered important enough to index.

Does the book and/or index construction lend itself to repagination?

Remember: being able to **quickly** find the existing index entries on each page in the previous edition is paramount to a successful repagination effort.

Factors you need to consider include the following:

- Subject area? Suitable topics I've found include computer, math, and textbooks.
- Structured layout, with lots of headings and subheadings?
- Sharp, clear-cut distinctions for topic changes?
- Lots of white space?

Any book that is written in small, hard-to-read print, with high index density, or in a subject area where the topic is not clearly identified and delineated would be problematic to repaginate.

Do they have (or can they get) all the necessary materials for you?

Once you've decided that this project **is** a candidate for repagination then make sure you can obtain all of the following essential materials:

- Previous edition's index in electronic form (MS Word or PDF)
- Previous edition's PDF or bound book (to include table of contents)
- Current edition's manuscript as hardcopy and/or PDF (to include table of contents)

If any component is **not** available, then that is a deal breaker and you need to decline this as a repagination project. (However, if you are dealing with a packager and they don't have the previous edition's manuscript/bound book, ask them if they can obtain it directly from the publisher. You can always offer to return the book to the publisher after you've completed your project.)

Do you have a way (and the time) to deconstruct the prior edition's index?

Finally, you have to have a way to **deconstruct** the previous edition's index so you can then use it as the basis for the actual repagination effort. (That is, you need to be able to manipulate the PDF or the MS Word file into a format that can be imported into one of the major indexing software packages.)

I'd recommend one of the following deconstruction methods, depending on your preference:

- IndexDeconstructor¹ (third-party utility)
- Conversion service like Indexing Research² or LevTech³ for an additional but reasonable fee

Note: I discuss how to use IndexDeconstructor in a separate but associated article in this journal. Contact information for Indexing Research and LevTech is provided at the end of this article.

PREPARING THE INDEX

Preparing the index takes me about 50% of the total project time. This step is critical to the remaining steps since everything else depends on the accuracy of these preparations.

I find this step more time consuming and requiring more concentration than the repaginating effort, which goes quickly and I find quite fun to do! (Remember, everything is based on good organization and thorough candidate screening.)

Creating a spreadsheet of the page ranges in the previous/current editions

As you've noticed in the examples above, it can become **extremely** difficult to remember what needs to be done with each book in the series (especially if you are repaginating multiple projects).

To keep me organized, I create a spreadsheet with this essential information. It contains the new/old page ranges for each chapter and where the material for the source chapter is coming from. (Figure 1 illustrates a complicated project that incorporates all three pricing structures: straight import, refolio pages, and modify pages.)

Part	NEW From	NEW To	NEW Pages	OLD From	OLD To	OLD Pages	ULD
1	79	172	94	79	172	94	from CA 6701 - ch 1
2	173	258	83	173	258	83	from CA 6701 - ch 2
3	259	342	87	259	342	87	from CA 6701 - ch 3
4	343	404	62	353	415	73	from CA 6701 - ch 4
5	405	491	87	416	507	92	from old CAT ch 5
6	492	554	63	508	572	66	from old CAT ch 6
7	555	626	72	576	653	78	from old CAT ch 7
8	627	689	63	605	667	63	from CA 6701 - ch 8
9	690	750	61	688	728	41	from CA 6701 - ch 9
10	751	800	50	729	768	39	from CA 6701 - ch 10
11	791	850	60	809	838	29	from CA 6701 - ch 11
Total pgs		638		refolio	222	new work	

Figure 1. Spreadsheet showing page ranges for previous/current editions

Deconstructing, importing, and validating imported records

Please read the associated article *Demystifying IndexDeconstructor* for complete details about this crucial part of the repagination process.

Distinguishing between original and modified page locators in the indexing file

Before starting the repagination process, you will need to develop a method to keep the original page numbers distinguishable from the revised page numbers.

There are several different methods to accomplish this, what you need to do is identify and use the method that is most intuitive/comfortable for you.

- Append a descriptive phrase at the end of each (non cross-reference) page locator. [I use (**old??**) — italicized and bolded here just for visibility.]

Note: Using this method allows finding records by page range to still work. (When I modify the page locator information, the (**old??**) is naturally wiped out.)

- Prepend a very high number (greatly exceeding the book's page range) such as **5000** to all non-cross-reference numbers.

Using either of these methods will allow you to easily distinguish between modified and not modified (original) records while working.

Creating time-saving macros for repetitive tasks

I've created three different macros to accommodate repetitive manipulations to the page locator field:

- Add (**old??**) to the end of page locator field (to prep the index before I start the repagination process)
- Remove (**old??**) from the end of the page locator field. (For those times when the original/new pages remain the same.)

- Copy previous page number into the page locator field. (First wipes out whatever is in the page locator field and then replaces it with the last page locator entry that was used.)

REPAGINATION PROCESS

If everything has been prepared correctly and good decisions were made regarding the viability of this process for this project, then the repagination process goes quickly and I find it quite fun to do!

Identify — at a high level — what's changed in the chapter you'll be working with

It is important to get a high-level overview of the changes in each chapter you'll be working with. You can quickly obtain this overview by reviewing the TOC (table of contents) for both the previous and the current edition and identifying what sections have moved, etc. Keep that in mind when you're working with that chapter. For example, if the previous edition identified 6 sections within the chapter, verify all that 6 sections still exist in the current edition.

Note: Obtaining the TOC for the current edition is a constant challenge I face with many of my clients. They have the idea that, since the front matter won't be indexed, the indexer doesn't need to receive it. I'm persistent in asking for the TOC and just keep asking (nicely) till I get it.

Specifics to check for:

- Are the sections still in the same order? (If not, then you'll have to pay extra close attention to the records in the moved subsection to ensure you've correctly repaginated them.)
- Have any of the sections been deleted? (You'll need to delete the entries for the original edition.)
Warning!! First make sure this section has not moved to another chapter!
- Have any sections been added? (You'll need to create index entries that fit seamlessly within the existing indexing framework.)

Modifying pages from previous edition

Most of the work occurs here. I'll explain this, the most complicated process, in its entirety (and I'll add some pointers unique to the other two categories immediately following this section). Here's what I do (if you use PDF files instead of manuscript pages, modify the instructions to suit your working style)

1. Open the index file.
2. Using the page range information from the spreadsheet I created earlier, I select only one chapter at a time to work on and create a temporary view that shows only the (**old??**) records within that page range.
Note: Working with a small set of records gives me a great sense of accomplishment when I'm all done.
3. Place the index records in page number order.
4. Open the previous edition's book to the correct chapter. Place the loose pages for the current chapter in front of me on my editor's desk (see Figure 2 for my work setup).

Note: I find that viewing 3 pages at a time lets me more easily track changes that flow across multiple pages—something that I can't do using PDF files.

Note: I used to carefully mark up the differences in page breaks between the two sets of materials but I quickly found that doing didn't help me enough to justify the additional time it took. Now I just analyze the differences as I go along and that works for me. However, you should consider first marking page breaks to determine if doing so will help you with your process.

5. Starting with the first page in the chapter, I look for differences between the previous and current editions. I look for page breaks first and then I search for the index terms identified for that page.
No differences in page structure: I know that every index entry in the previous edition exists on one page the current edition so I can just substitute the new page number for all the entries with the previous edition's page number.

Page breaks differ between editions: I identify where the previous edition's page break occurs in the current edition and then identify the index entries affected by the page break. I know that the index entries on that specific page for the previous edition might be split between two or more pages in the current edition and I work my way through the index records, one at a time, until I've identified the "new" page for each existing entry on that page.

Previous edition's material is not found in this edition: This means that this section was either deleted or moved. I review the TOC for this chapter to see if the current edition also has this section but in a different location within the chapter. If not, then I quickly look at other chapters in the new edition's TOC to see if this section has been moved to another chapter. If not, then I search through the PDF files of the current edition to see if I can spot the material in a different location. If I can't find the material, I delete the index entries for the relevant pages.

Note: On rare occasions I'll come across an index term that doesn't "fit" the other terms on that page. It's completely unrelated to the other terms and could be a case of an incorrect page locator entered into the previous edition's index. In these cases, I search through the PDF files to see if I can spot the discussion for these incongruous terms and I just correct them as I encounter them.

Current edition contains material not found in previous edition — This is new material that I need to index from scratch but in such a manner that I seamlessly incorporate the new information into existing index terms and structure.

Note: Repagination projects should be minimally invasive. Even if you don't like the former index, don't make any structural changes. Remember, your client informed you the authors or they themselves liked this index, so just make the least intrusive changes possible. It's like retouching a painting so no one can tell the original from the touchup. If you really have problems with the index, then you need to go back to the client and re-evaluate this whole decision to repaginate and, perhaps, this time, you can provide details of how you think you can improve the index by indexing from scratch. That's up to you.

6. Continue going through the pages in each chapter and then through all the chapters till done.
7. At the end, search for any remaining (**old??**) pages and modify them as appropriate. (These would be stray records that had been accidentally skipped during the repagination process.)

Straight import of pages from index from another book (current edition)

If the chapter you need to manipulate uses **exactly** the same material from another book **and the page numbers are exactly the same** between both books, then do the following:

1. Open the index in the "from" book side by side with the index in the "to" book.
2. In the "from" index:
 - Identify the page range for the relevant material.
 - Create a temporary view for all records containing that page range.
 - Copy all records for that page range.
3. Paste all copied records into the "to" index.
4. Delete all (**old??**) index records for the affected page range in the "to" index.

Refolioing pages from index from another book (current edition)

If the chapter you need to manipulate uses **exactly** the same material from another book **but the page numbers are different** between both books, then do the following:

1. Open the index in the “from” book side by side with a temporary index you’ve just created.
2. In the “from” index:
 - Identify the page range for the relevant material.
 - Create a temporary view for all records containing that page range.
 - Copy all records for that page range.
3. Paste all copied records into the “temp” index.
4. In the “temp” index:
 - Identify the page range for the target book.
 - Determine the difference in the page numbers between the “from” and “to” indexes.
 - Use the functionality within the indexing program to automatically adjust the page range.
 - Spot check some records to determine if the correct adjustments were made. If not, repeat the last two steps till satisfied that the pages were adjusted correctly.
5. Paste all adjusted records from the “temp” index into the “to” index.
6. Delete all (old??) index records for the affected page range in the “to” index.

FINAL EDITING

Perform your typical editing steps. At a minimum, remember that, if you’ve combined indexes from two sources, there are often slight inconsistencies in index terms to watch out for, such as:

- Main entries differing in plural versus singular construction
- Subentries differing in endings or use of articles/prepositions
- Orphan subheadings
- Cross references that need to be deleted or changed to double postings
- Overlapping page locators
- Differences in formatting and/or capitalization usage

Once you’ve completed this step, the entire repagination process is done. Congratulations!

A NOTE ABOUT MY WORK ENVIRONMENT

Work setup/environment is very important, especially with the volume of pages you’ll be manipulating. Remember, you’ll be working with double the normal number of pages — one set for the previous edition and one set for the current edition.

It will be critical to have enough space on your desktop to easily and quickly manipulate your papers. The following setup (Figure 2) works well for me and provides me with all the space for the material I need to use:

- Desk with elevated platform for monitors
- Two monitors (indexing program in one and PDF in other if needed)
- Custom-made editor’s desk (wide enough for 3 pages across)
- Atlas⁺ book holder
- Holder for spreadsheet pages



Figure 2. Spreadsheets showing page ranges for previous/current editions

WRAP UP

Hopefully this article has explained the repagination process to you in sufficient detail so you can now decide whether to run away from these projects or accept them!

Remember, if you get any ideas about how I might improve this process, please contact me at lucie@luciehaskins.com.

NOTES

1. IndexDeconstructor: www.editorium.com/indexdeconstructor.htm.
2. Indexing Research: www.indexres.com/home.php.
3. Leverage Technologies: www.lectechinc.com/.
4. Atlas book holders: www.bookandcopyholders.com/.

Finding Direction: Reflections of a Once and Future Newbie (Continued from page 19)

go home to my “babies” yet sad that my “free time” had flown by so quickly! I had not even opened one of my three books! Now I also had seminars to summarize, names and faces to remember, and countless pieces of new information to put into place in my indexing career. Waiting for my plane to depart, I began to redirect my thoughts towards my home and family. Upon opening a book I had along on science projects for preschoolers, *Kid Concoctions & Contraptions*, I was pleasantly surprised to find an index in the back! Aha, a new and exciting specialty, I thought—indexing books for preschoolers! Yet unfortunately I somehow doubt that the authors actually hired an indexer for this job. The index was divided into five categories: Concoctions, Edible Concoctions, Contraptions, Flying Contraptions, and Paint Concoctions. None of the seminars I attended had discussed appropriate methods for indexing such a delightful book! I honestly wonder if the authors’ children created the index, as children were clearly the intended audience. Was any parent reading this thinking, “Which of these experiments will make something that can fly? Which ones are edible?” I don’t know, but not me. My concerns were: “Which of these might relate to something the kids are learning about?” along with the most pressing question of “Which of these can I do using the items I have at home so that I don’t have to run to the store before Tuesday?” If I could have looked up experiments by ingredient or topic, the index would have been most helpful, entertaining though it was.

I was so engrossed I actually almost missed my flight, since as it turned out I was sitting on the wrong side of the terminal. As I boarded the plane and headed back to Sacramento, I reflected on my experiences at the conference. I had come a long way and learned a great many things, but I still had a long way to go! This elusiveness of expertise is one quality that I enjoy about indexing, as an act and as a profession. Just as the details of one set of intricacies come into focus, the questions of the next challenge are already becoming clear. I can only hope that I will be so lucky as to be able to attend next year’s conference and continue the unraveling.