



Client guide for index styles and specifications

This form is intended for client use in determining details for indexing projects. It may be used as a companion piece to go along with the "Indexing Styles 101" section located on the 'Styles...with Style' page of the website. When the form is completed, clients should save a copy for their records, then submit it by pressing "Submit by Email."






Part 1: Project information

Project name/book title:

Author name:

Client name: 



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Part 2: Proof & delivery dates

2.1 - Proofs to the indexer

As a complete set Delivery date:

In batches Delivery date of first batch:

 Delivery date of last batch:

2.2 - Deliverable to client

What is the date of delivery for the final index?:


Top Hat Word & Index
7829 Center Blvd SE #206
Snoqualmie, WA
98065

Email: Paul@TopHatWordandIndex.com
Phone: 520.271.2112

www.TopHatWordandIndex.com

Part 3: Types, styles, & format of index

3.1 - Type of index

single index authors cited? 

multiple indexes

3.2 - Style guide used

Chicago Manual of Style, 16th edition (CMS16)

house style details

other style details

3.3 - Format of the index

indented

run-in (only two levels)

hybrid (typically three levels; ME, indented SE, run-in SSE)

4.3 - Subentry arrangement

alphabetical (most common)

chronological (common with biographies)

by order of page number

4.4 - Main heading capitalization

proper names only

first letter only

entire heading

4.5 - Arrangements for numbers

as spelled out (typical for indexes with few number MEs)

numeric order (rec'd for indexes with many number MEs)

by size

Part 4: Alphanumeric & capitalization treatments

4.1 - Alphabetizing

CMS (letter by letter)

NISO (word by word)

Columbia

ISO

4.2 - Alphabetic separators?

YES

NO

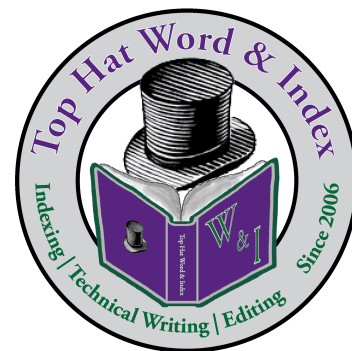
4.6 - Arrangements for diacritics

as spelled out (most typical)

ASCII order

other method as specified by client/publisher/author

method details



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Part 5: Cross reference format & placement

5.1 - "See" cross reference format

- term. See abc (CMS16 standard)
- term, see abc
- term (see abc)

5.2 - "See also" cross reference format

- See also xyz (CMS16 standard)
- see also xyz
- (see also xyz)

5.3 - "See also" placement

- At the top of the entry run off from the main heading.
- At the bottom of the entry as the last subentry (CMS16 standard).
- Indented as the first subentry.
- Punctuation for the See also run-in format to be determined.

5.4 - Should there be subentry cross references?

- YES
- NO

5.5 - What should the subentry "See also" placement be?

- Run off from the subentry
- Other Please specify

Part 6: Punctuation & continuous discussion

6.1 - Punctuation for an indented index

- No special punctuation.
- Colon after main entry/subheading without locators.

6.2 - Punctuation for a run-in index

- Punctuation after main headings without locators. Specify details
- Punctuation after main headings with locators. Specify details
- Punctuation between multiple subentries. Specify details

6.3 - Format for continuous discussion of a topic

- Numbers in full with en dash (324-329).
- Numbers elided (compressed) per CMS (324-9).
- Numbers elided (compressed) per other format. Specify details

Part 7: Miscellaneous elements

7.1 - Footnotes/endnotes...indexable?

- YES Locator format
- NO No preference in locator format

7.2 - Appendices...indexable?

- YES Locator format
- NO No preference in locator format

7.3 - Bibliographies...indexable?

- YES Locator format
- NO No preference in locator format

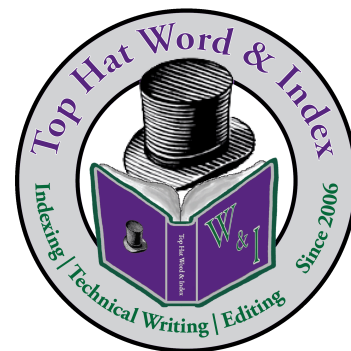
7.4 - Display material...indexable?

- YES Locator format
- NO No preference in locator format

7.5 - Other material...indexable?

- YES Specify material
- NO Locator format
- No preference in locator format

Client guide for index styles and specifications (continued)



Part 8: Index length & fonts

8.1 - Is there a length limit?

- NO (please skip 8.2, and move on to 8.3)
- YES (please see 8.2)

? 8.2 - If YES to 8.1, please indicate applicable variables to length limit (choose A or B)

8.2.A - layout specifications (don't fill out 8.2.B; this will dictate manuscript length)

- Number of pages. Desired number?
- Number of lines per column. Desired number?
- Number of columns. Desired number per page?
- Page layout/margins.

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Please indicate any more details pertaining to layout and margins.

8.2.B - manuscript specifications (don't fill out 8.2.A if you're filling this out)

- Number of pages.... What is the desired amount of manuscript pages?
- Number of lines.... What number of index lines are allowed in the manuscript?
- Characters per line.... What is the desired number of characters per line?

8.3 - Font type for manuscript

- Times New Roman
- Other Please specify font type

8.4 - Font size of manuscript

- 10 point
- 11 point
- 12 point
- other Please specify font size

Part 9 (final portion!): Delivery format of index

9.1 - Desired format of deliverable

- e-manuscript, single-spaced
- e-manuscript, double-spaced
- camera-ready
- e-book (only)
- embedded version (additional format) embed details
- e-book version (as additional format) e-book details

9.2 - Text file format for deliverable

- Rich-text format (.RTF file, most typical delivery format)
- ASCII with generic codes
- MS Word Please specify version
- Word Perfect Please specify version
- other Please specify format/version

Thank you for taking the time to complete this form....it will help us to achieve the best deliverable possible for your project. Please see the top right corner of Page 1 for printing and the submittal button.

If you would be kind enough to take the quick survey of three questions (with a **?** comments box) to the right, this will help to advise me on the usability of this form and possible ways to improve it.

1: How clear were the instructions on this form?

- very clear
- somewhat clear
- neutral
- unclear in parts
- very unclear

2: How would you rate the ease of use for this form?

- very easy
- somewhat easy
- neutral
- not that easy
- not easy at all!

3: Do you feel that filling out this form streamlines coordination on the index?

- definitely
- yes, I'd say so
- not sure...I'm undecided
- not really
- no...actually the opposite

Again, thank you for your time and diligence!

☰ Any other comments or suggestions?