



# Scottsdale, ASI, Conference

April, 2019

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Why embedding indexing  
Digital publications



What's the reality now  
BoB index and Critical path



How we are innovative  
Transformation in Indexing



How Index-Manager facilitates indexing  
From term selection to quality check



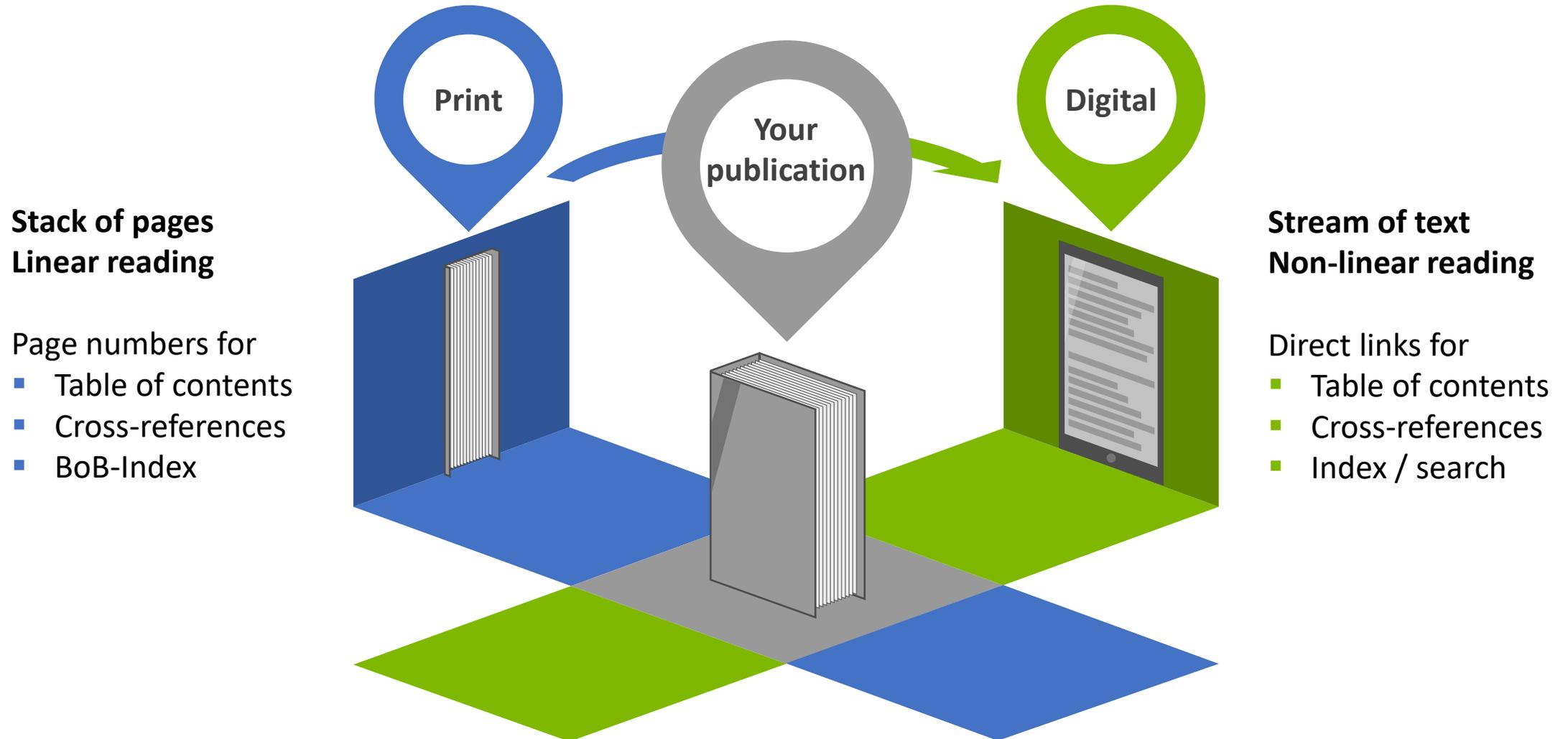
When is embedded indexing done?  
Manuscript, e.g. in Word, Layout e.g. in InDesign...



Where we are headed and what we offer  
Smart Data with *klar:suite* solutions and  
Index-Manager subscription plans

# Publications are Changing Fundamentally

## Change your Perspective



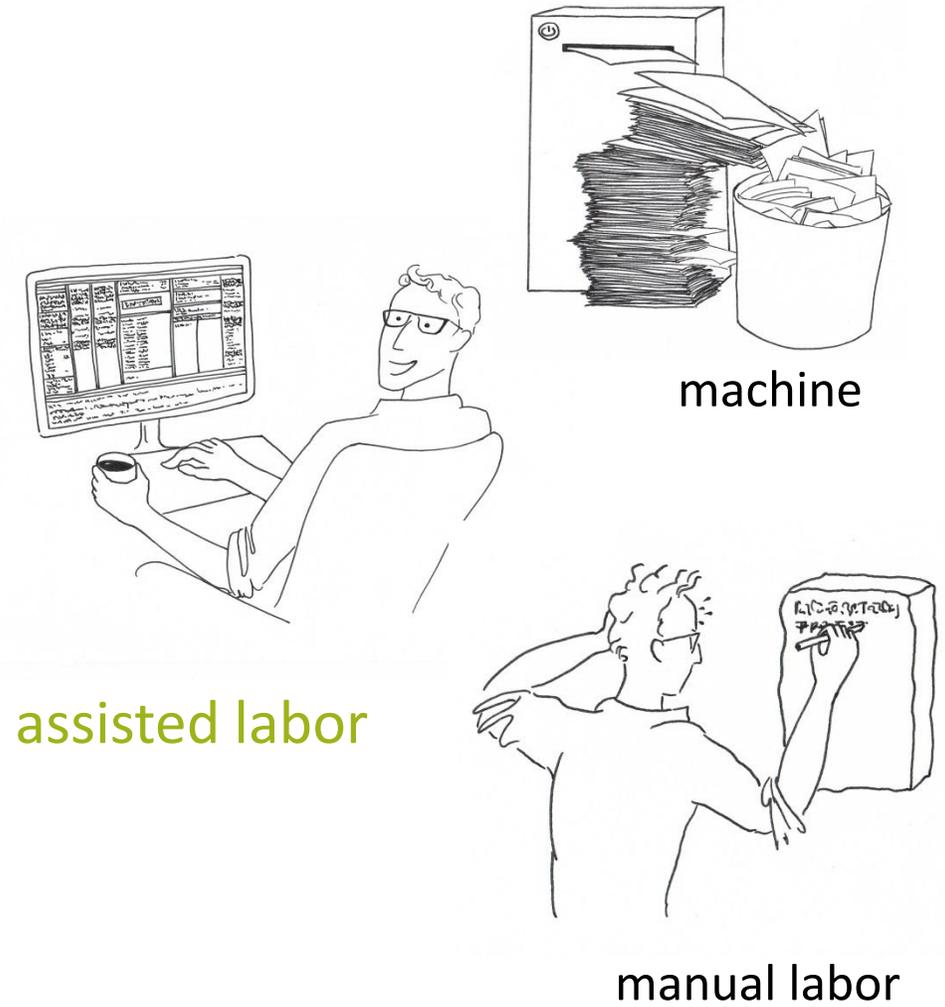
# Why is indexing important in the digital world with exponential information growth?

For the conceptual work! The indexer:

- selects relevant terms and text passages
- differentiates primary (most important) and secondary (only mentioned) occurrences
- creates appropriate subentries and cross-references
- knows the reader and extends the index by terms and concepts not used by the author
- ensures terminology consistency

But, indexing in the digital world needs

- embedded entries
- innovative IT assistance and
- deeper integration into the publishing process





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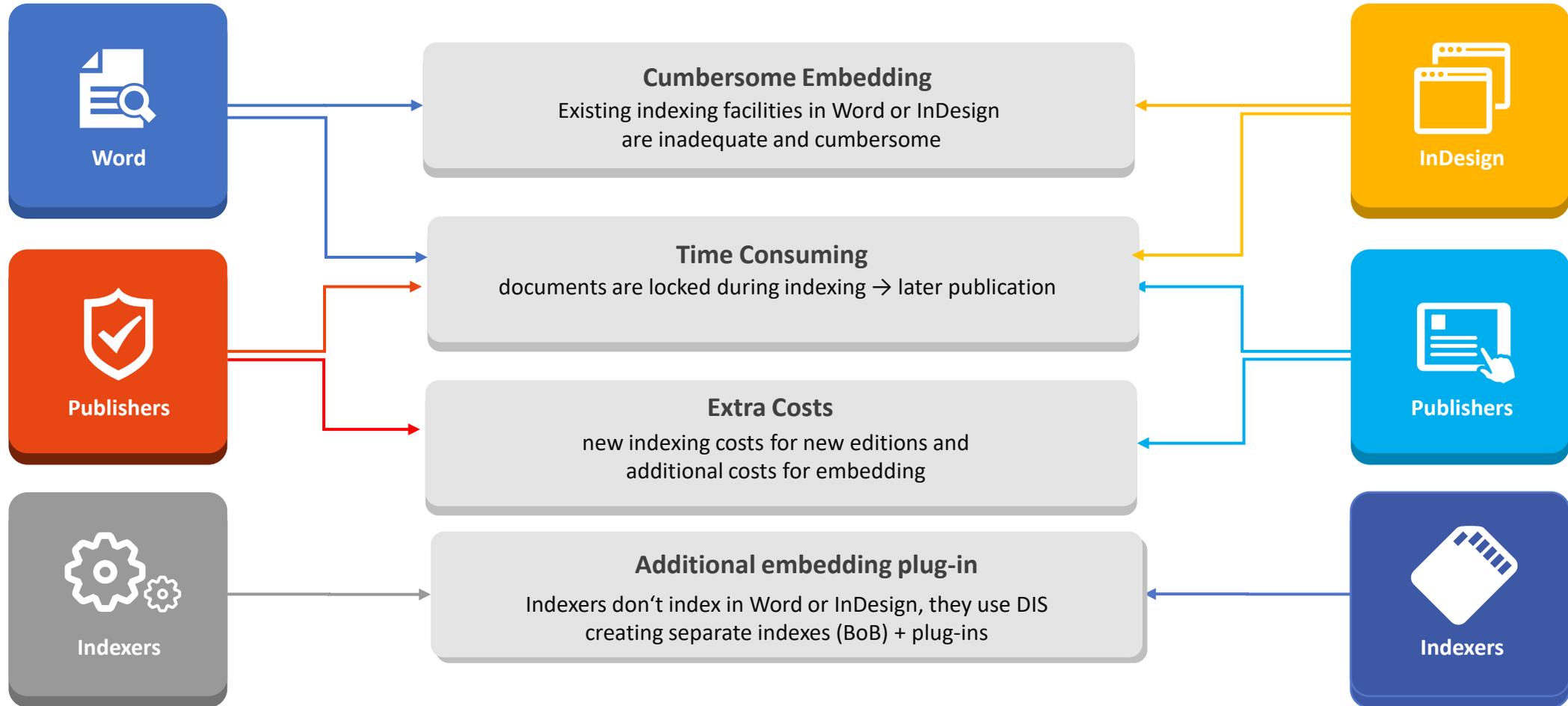
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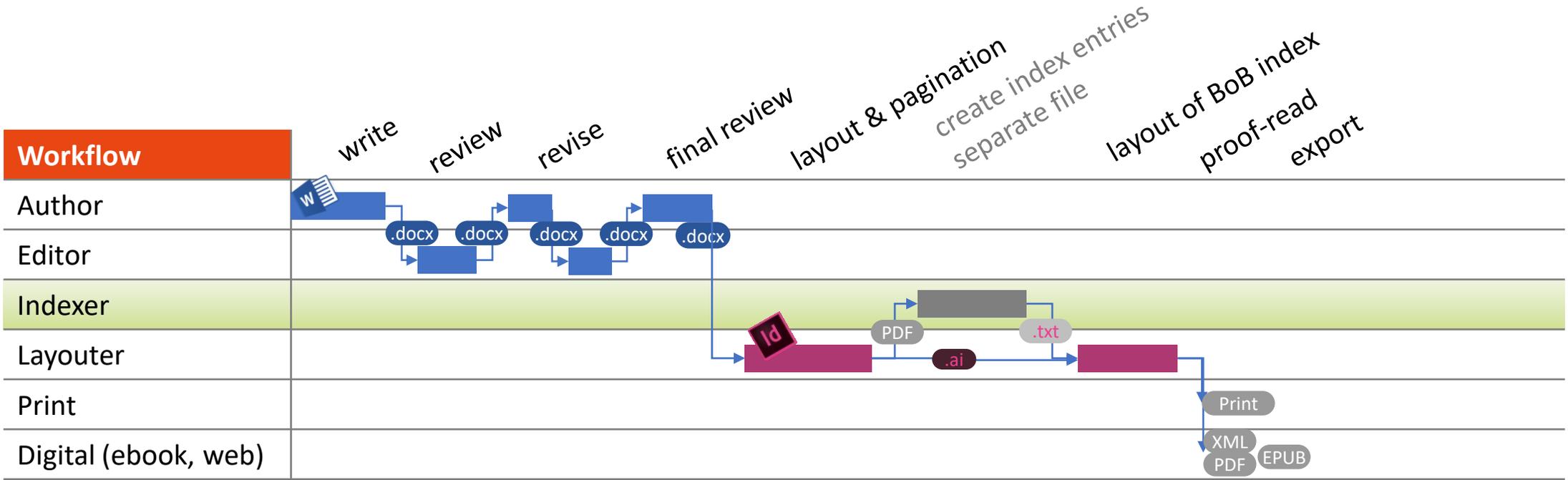
# The reality for embedding indexing now



# Book production workflow

## Version A: reality now – BoB index and critical path

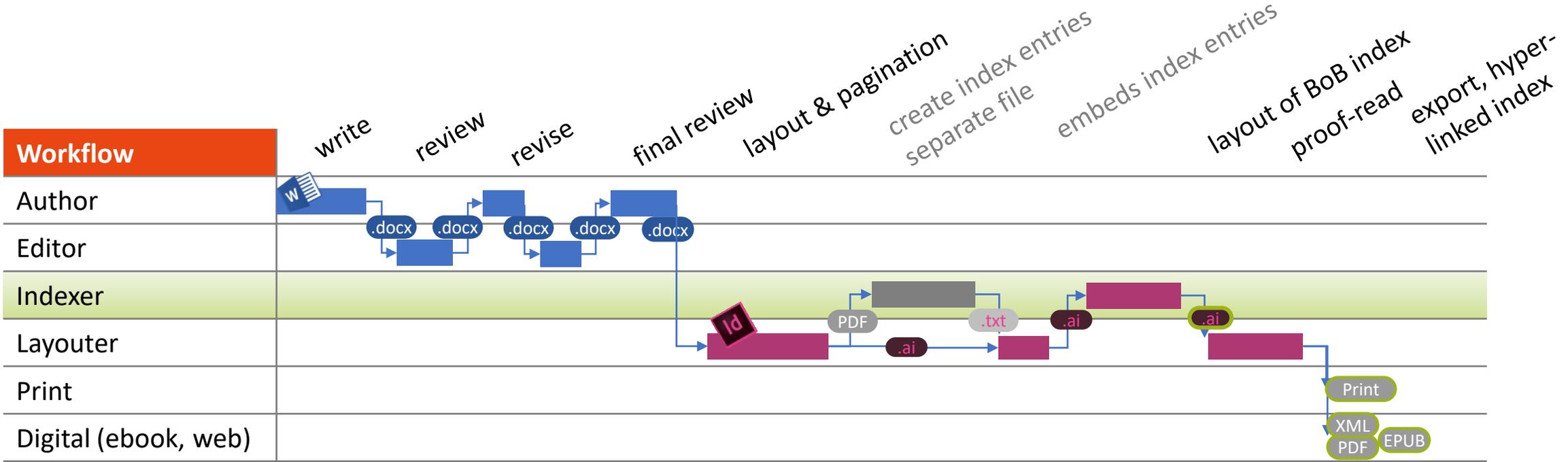
- Advantage: Indexers can use the dedicated software they are used to
- Problem Indexer: last minute indexing
- Problem Publisher: no hyperlinked index entries, additional costs for new editions



# Book production workflow

## Version B: reality now – BoB index, embedding and critical path

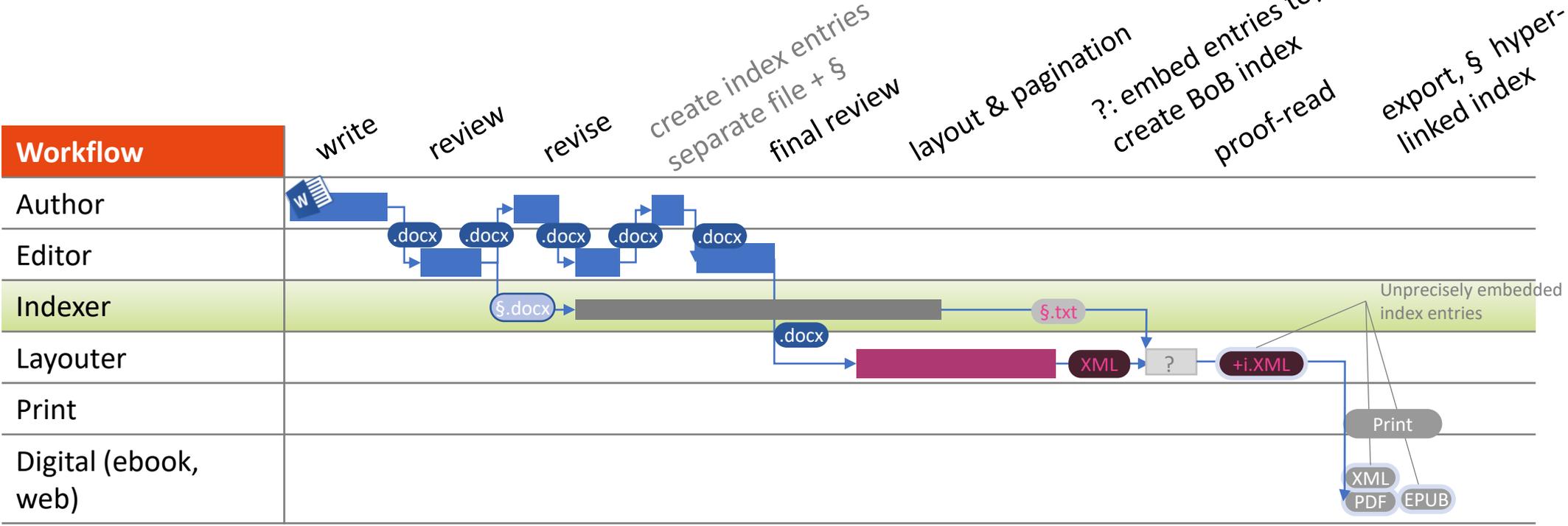
- Advantage: Indexers can use the dedicated software they are used to
- Problem Indexer: last minute indexing, cumbersome additional embedding
- Problem Publisher: hyperlinked index entries, additional costs for embedding

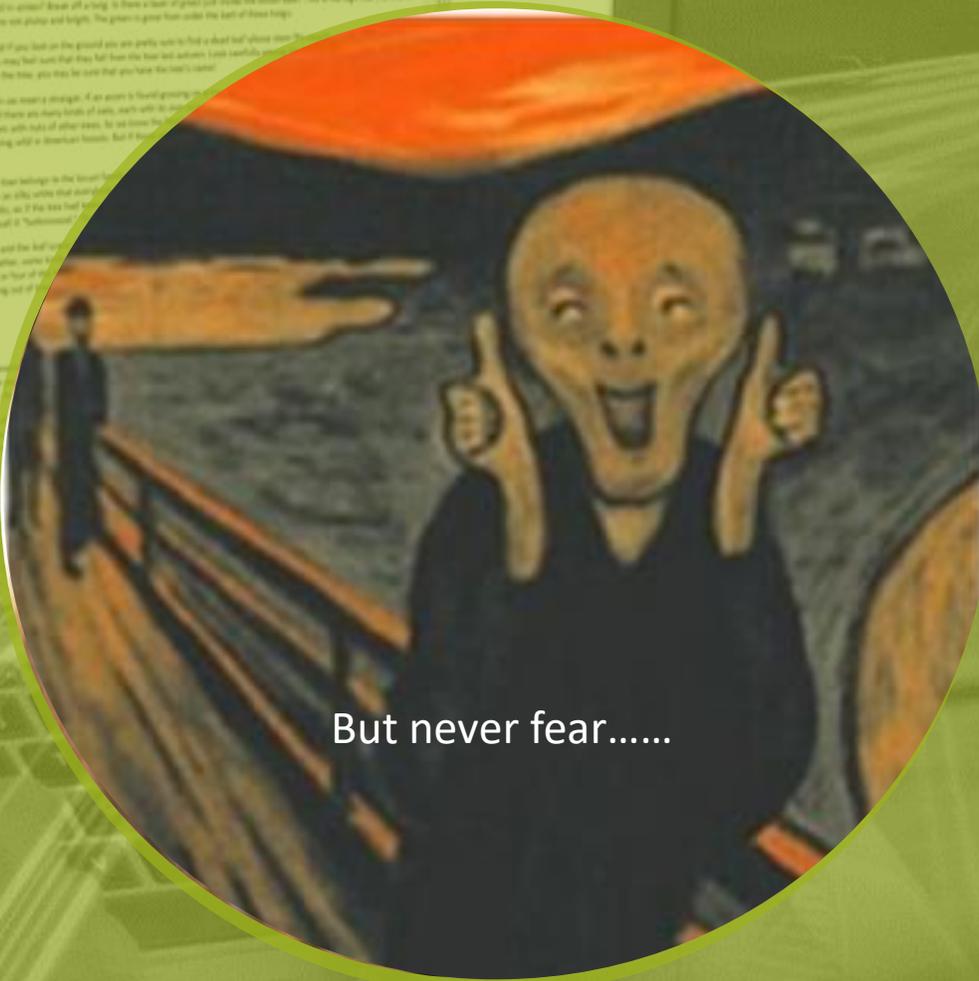


# Book production workflow

## Version C: Reality now – §-numbers in Word -> XML embedding tool

- Advantage: embedded, indexers work with software they are used to, no time loss, data sovereignty
- Problem: index is incorrectly linked (e.g. just to top of §), this is not helpful to the readers' experience
- Problem: additionally create § version, embedding tool (?)





But never fear.....





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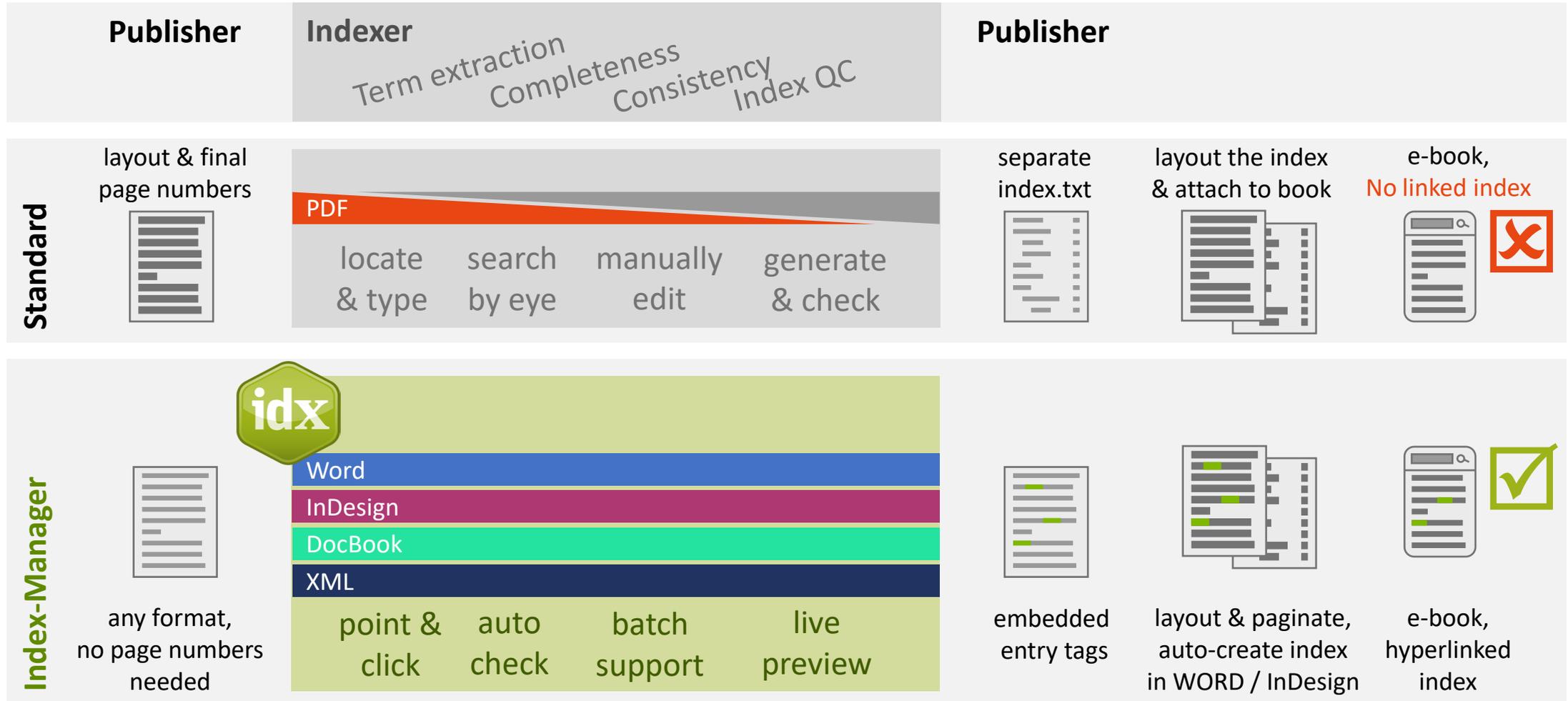
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# Index-Manager

Flexible workflow, faster indexing, better index, fit for digital

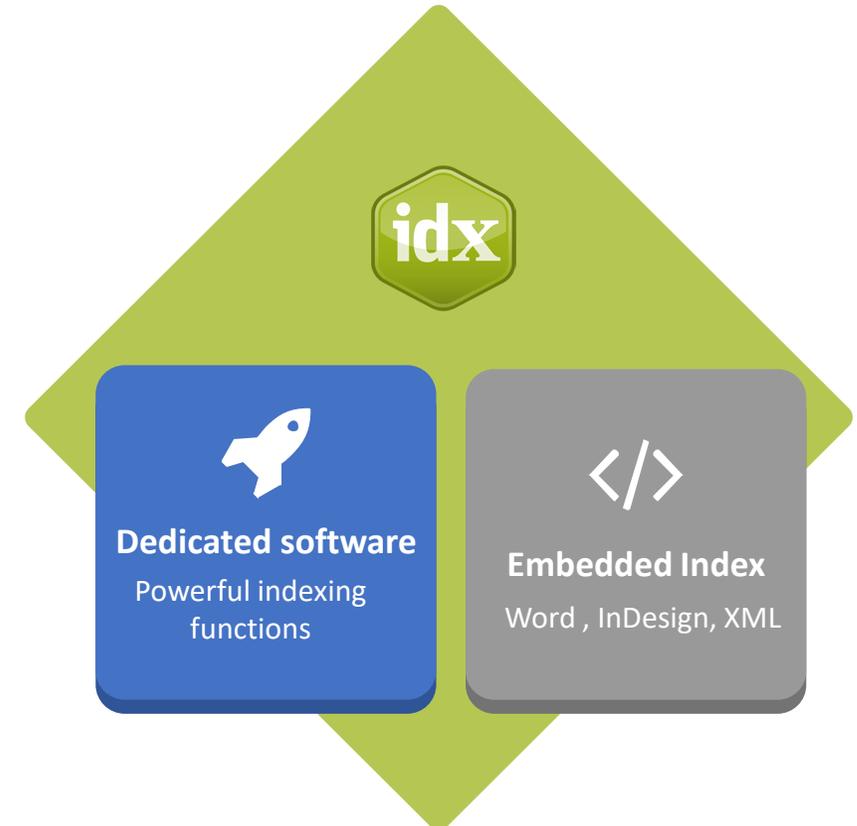


# Index-Manager – powerful indexing and embedding functions

## Index-Manager

- replaces other DIS + Third-party plug-in (WordEmbed, DEXembed, IXMLEmbedder) altogether
- is a powerful dedicated indexing software (DIS) and the only one for embedded indexing

Index-Manger offers the same functionality (and more) as other dedicated indexing tools  
**and**  
 it also inserts the index entries into the document files



You don't have to decide!



# Import and entire process in Index-Manager



The screenshot shows the Index-Manager x04 v3.3.18 application window. The main interface is partially obscured by a 'Welcome' dialog box. The dialog box features the 'idx index-manager' logo and is divided into several sections:

- Mode:** Contains four radio buttons for selecting the operating mode:
  - Text mode:** For creating entries using the manuscript text.
  - Word List mode:** For creating entries using a list of frequently occurring words.
  - Edit mode:** For correcting and standardizing index entries.
  - Index mode:** Displays index entries in a sorted multi-column view.
- Files:** A section with a '+ X' icon and a filter icon, containing a link: [Input manuscript files...](#)
- Projects:** A list of project entries:
  - 20170523\_How to...+index\_word (1) 11.04.2019 15:52
  - 20170523\_How to... trees\_word (2) 09.04.2019 18:14
  - 20170523\_How to... trees\_word (1) 09.04.2019 18:11
  - 20170523\_How to...+index\_word (1) 09.04.2019 16:40
- Start:** A large green button at the bottom right of the dialog.

At the bottom of the dialog, there is a text box with the following information:

License validated!  
 Product: IndexManager2\_x04  
 Installations: 30  
 Valid until: 2025-05-12 21:45:43  
 Functions: Abonnement Index-Import Wordlist: phrases Index transfer

The background application window shows a menu bar (File, Mode, Window, Extras, Help), a toolbar with icons for search, save, and create entry, and a sidebar on the right with an alphabetical index (A-Z) and a 'No. of columns' dropdown set to 1. The main workspace is currently empty.



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# Index-Manager – Easy input



## No typing, no copy&paste

Easy input by double-click from the text



## Content-focused

Don't care about locators or paragraph numbers



## Document view

text layout as used, XML without tags



## Flexible user interface

drag&drop, windows, modi

Easy input



# Index-Manager – Term extraction



## Systematic indexing

along headings and structure



## Search in text

Select the subheading,  
chronologically along the text



## Context overview

Select the subheading,  
chronologically along the text



## Search via word list

Select the subheading, check every  
occurrence of a term



## Preparatory work

Filter options, along your own  
marking ups, or the author's/  
publisher's highlighting



## Formats

Filter options, along tags of  
different kinds directly in the text,  
even for different indexes



## External resources

“Load word list file”,  
concordance list, terminology

# Term extraction – Search in text

The screenshot displays a software interface with three main windows: 'Index', 'Text', and 'Index-Preview'. The 'Index' window shows a table with columns 'No.', 'Position', 'Entry', and 'Subentry'. The 'Text' window shows a document with highlighted terms and a search bar. The 'Index-Preview' window shows a table with columns 'Entry' and 'Idx-Nr'.

No.	Position	Entry	Subentry
1	S02W064	winter time	
2	S02W141	summerhouse	

**Text Window:**

How to know the trees How to know the trees

The best time to begin to study the trees is to-day! The place to begin is right where you are, provided there is a tree near enough, for a lesson about trees will be very dull unless there is a tree to look at, to ask questions of, and to get answers from. But suppose it is winter time **winter times**, and the tree is bare. Then you have a chance to see the wonderful framework of trunk and branches, the way the twigs spread apart on the outer limbs, while the great boughs near the trunk are almost bare. Each branch is trying to hold its twigs out into the sunshine, and each twig is set with buds. When these buds open, and most of them send out leafy shoots, the tree will be a shady summerhouse **summerhouse** with a thick, leafy roof that the sun cannot look through. Among the big branches near the trunk very few leaves will be found compared with the number the outer twigs bear.

How can we tell whether the tree is alive or dead in winter? Break off a twig. Is there a layer of green just inside the brown bark? This is the sign that the tree is alive. Dead twigs are withered, and their buds are not plump and bright. The green is gone from under the bark of these twigs.

Under each bud is the scar of last year's leaf, and if you look on the ground you are pretty sure to find a dead leaf whose stem fits exactly into that scar. If there are a number of these leaves under the tree, you may feel sure that they fell from the tree last autumn. Look carefully among the leaves, and on the branches for the seeds of this tree. If there is an acorn left on the tree, you may be sure that you have the tree's name!

The name is the thing we wish first to know when we meet a stranger. If an acorn is found growing on a tree, that tree has given us its name, for trees that bear acorns are all oaks. An acorn is a kind of nut, and there are many kinds of oaks, each with its own acorn pattern, unlike that of other oaks. Yet all acorns sit in their little acorn cups, and we do not confuse them with nuts of other trees. So we know the family name of all trees whose fruits are acorns. They are all oaks, and there are fifty kinds in our own country, growing wild in American forests. But if those of all countries are counted, there are in all more than three hundred kinds.

If, instead of acorns, pods hang on the twigs, the tree belongs to the locust family, related to our garden peas and beans. The signs by which we learn to know trees are not many. The bark of the white birch is so silky white that everybody knows that tree. The sycamore sheds its bark in thin, irregular sheets, leaving patches of dirty white streaking the trunk and limbs, as if the tree had been daubed and spattered with whitewash. This tree is so strikingly different from others that nearly everybody knows it by name. Or they call it "buttonwood." The seed-balls hang on slender stems, swinging in the winter wind.

The winter signs to notice are the bark, the buds, and the leaf scars, the shape of the tree, and the way it branches. The fruit it bears may be seen in summer, autumn, or winter. The flowers come in warm weather, some kinds early, some later, and the leaves are new in spring, and most trees shed them in autumn. There is no time of year when there are not three or four of the important signs hung out on every tree to guide those who are trying to find out its name, and learn the story of its interesting life. And the finding out of tree names is not dreary and hard, but a good game to be played out-of-doors.

**1. Tree studies in the autumn**

**1.1 The shagbark hickories**

The best **hickory** nut tree that grows wild in our American forests is the **shagbark**, or shellbark. Who says that the pecan is better than the nut of the **little shagbark**? Southern people insist upon this, as the pecan is the pride of the Southern states. As a compromise we may place side by side the pecan of the South, and the little shagbark of the North, and challenge the world to produce a nut that is worthy to rank with these two in quality.

The shagbark takes its name from the tree's habit of shedding the bark in long, narrow strips or flakes, that curl away from the point of attachment, but cling for months, perhaps, giving the trunk a shaggy appearance, and making very easy the discovery of these trees in a stretch of mixed woodland. And how it does out and slash the stoutest of overalls to scramble up and down one of these trees? Only boys and their despairing mothers can know just how costly a Saturday afternoon nutting expedition can be, and why many a boy finds it expedient to come back with his bag of nuts in the late dusk. Otherwise he might be mistaken for a tramp, so tattered are his clothes.

The smooth little nuts are angled and pointed, and when they are ripe, the thick, corky, green husks part into four equal divisions, and the nuts fall out. So much less trouble than walnuts, in their spongy husks, that never part regularly, but wait until they are torn off by impatient boys or squirrels, or until they dry and gradually crumble away.

**Index-Preview Window:**

Entry	Idx-Nr
summerhouse	2
winter time	1

# Term extraction – Search in context

The screenshot displays a software interface for term extraction in context. It is divided into three main panes:

- Index Pane (Left):** Contains a table with columns 'No.', 'Position', 'Entry', and 'Subentry'. It lists two entries: 'winter time' at position 302W064 and 'summerhouse' at position 302W141.
- Text Pane (Center):** Shows the search results for the term 'branches'. The search results are displayed in a text window with a search bar containing 'branches' and a 'Create Entry' button. The text content includes:
 

**How to know the trees**

The best time to begin to study the trees is to-day! The place to begin is right where you are, provided there is a tree near enough, for a lesson about trees will be very dull unless there is a tree to look at, to ask questions of, and to get answers from. But suppose it is winter time **winter time**, and the tree is bare. Then you have a chance to see the wonderful framework of trunk and branches, the way the twigs spread apart on the outer limbs, while the great boughs near the trunk are almost bare. Each branch is trying to hold its twigs out into the sunshine, and each twig is set with buds. When these buds open, and most of them send out leafy shoots, the tree will be a shady summerhouse **summerhouse** with a thick, leafy roof that the sun cannot look through. Among the big branches near the trunk very few leaves will be found compared with the number the outer twigs bear.

How can we tell whether the tree is alive or dead in winter? Break off a twig. Is there a layer of green just inside the brown bark? This is the sign that the tree is alive. Dead twigs are withered, and their buds are not plump and bright. The green is gone from under the bark of these twigs.

Under each bud is the scar of last year's leaf, and if you look on the ground you are pretty sure to find a dead leaf whose stem fits exactly into that scar. If there are a number of these leaves under the tree, you may feel sure that they fell from the tree last autumn. Look carefully among the leaves, and on the branches for the seeds of this tree. If there is an acorn left on the tree, you may be sure that you have the tree's name!

The name is the thing we wish first to know when we meet a stranger. If an acorn is found growing on a tree, that tree has given us its name, for trees that bear acorns are all oaks. An acorn is a kind of nut, and there are many kinds of oaks, each with its own acorn pattern, unlike that of other oaks. Yet all acorns sit in their little acorn cups, and we do not confuse them with nuts of other trees. So we know the family name of all trees whose fruits are acorns. They are all oaks, and there are fifty kinds in our own country, growing wild in American forests. But if those of all countries are counted, there are in all more than three hundred kinds.

If, instead of acorns, pods hang on the twigs, the tree belongs to the locust family, related to our garden peas and beans. The signs by which we learn to know trees are not many. The bark of the white birch is so silky white that everybody knows that tree. The sycamore sheds its bark in thin, irregular sheets, leaving patches of dirty white streaking the trunk and limbs, as if the tree had been daubed and spattered with whitewash. This tree is so strikingly different from others that nearly everybody knows it by name. Or they call it "buttonwood." The seed-balls hang on slender stems, swinging in the winter wind.

The winter signs to notice are the bark, the buds, and the leaf scars, the shape of the tree, and the way it **branches**. The fruit it bears may be seen in summer, autumn, or winter. The flowers come in warm weather, some kinds early, some later, and the leaves are new in spring, and most trees shed them in autumn. There is no time of year when there are not three or four of the important signs hung out on every tree to guide those who are trying to find out its name, and learn the story of its interesting life. And the finding out of tree names is not dreary and hard, but a good game to be played out-of-doors.

**1. Tree studies in the autumn**

**1.1 The shagbark hickories**

The best **hickory** nut tree that grows wild in our American forests is the **shagbark**, or shellbark. Who says that the pecan is better than the nut of the **little shagbark**? Southern people insist upon this, as the pecan is the pride of the Southern states. As a compromise we may place side by side the pecan of the South, and the little shagbark of the North, and challenge the world to produce a nut that is worthy to rank with these two in quality.

The shagbark takes its name from the tree's habit of shedding the bark in long, narrow strips or flakes, that curl away from the point of attachment, but cling for months, perhaps, giving the trunk a shaggy appearance, and making very easy the discovery of these trees in a stretch of mixed woodland. And how it does cut and slash the stoutest of overalls to scramble up and down one of these trees? Only boys and their despairing mothers can know just how costly a Saturday afternoon nutting expedition can be, and why many a boy finds it expedient to come back with his bag of nuts in the late dusk. Otherwise he might be mistaken for a tramp, so tattered are his clothes.

The smooth little nuts are angled and pointed, and when they are ripe, the thick, corky, green husks part into four equal divisions, and the nuts fall out. So much less trouble than walnuts, in their spongy husks, that never part regularly, but wait until they are torn off by impatient boys or squirrels, or until they dry and gradually crumble away.
- Structure Pane (Bottom Left):** A tree view showing the hierarchy of the document. The root is 'A 20170523\_How to know the trees\_word' with 53142 words and 0 own words. It branches into four sub-entries: '1. Tree studies in the autumn' (15790 words, 6 own words), '2. Tree studies in the winter' (12940 words, 7 own words), '3. Tree studies in the spring' (8818 words, 7 own words), and '4. Tree studies in the summer' (14905 words, 7 own words).
- Index-Preview Pane (Right):** A table showing the index preview with columns 'Entry' and 'Idx-Nr'. It lists 'Summerhouse 2' at index 2 and 'winter time' at index 1.

# Term extraction – search in word list

The screenshot shows the Index-Manager software interface with three main panes:

- Index:** A table listing entries with columns for No., Entry, Subentry, Index name, 2nd subentry, and Page. The entries are:

No.	Entry	Subentry	Index name	2nd subentry	Page
1	winter time				
2	summerhouse				
- Text:** A document titled "How to know the trees" with highlighted terms: "winter time", "summerhouse", "shagbark", and "hickory".
- Index Preview:** A table showing the mapping of terms to their index entries:

Entry	Idx Nr
summerhouse	2
winter time	1

The main text pane contains the following content:

## How to know the trees

The best time to begin to study the trees is to-day! The place to begin is right where you are, provided there is a tree near enough, for a lesson about trees will be very dull unless there is a tree to look at, to ask questions of, and to get answers from. But suppose it is winter time, and the tree is bare. Then you have a chance to see the wonderful framework of trunk and branches, the way the twigs spread apart on the outer limbs, while the great boughs near the trunk are almost bare. Each branch is trying to hold its twigs out into the sunshine, and each twig is set with buds. When these buds open, and most of them send out leafy shoots, the tree will be a shady summerhouse with a thick, leafy roof that the sun cannot look through. Among the big branches near the trunk very few leaves will be found compared with the number the outer twigs bear.

How can we tell whether the tree is alive or dead in winter? Break off a twig. Is there a layer of green just inside the brown bark? This is the sign that the tree is alive. Dead twigs are withered, and their buds are not plump and bright. The green is gone from under the bark of these twigs.

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# Systematic indexing structure window, word list filter



# Index-Manager – Completeness



## Term-focused

Context overview, chronologically along the text



## Document-focused, Analysis and heuristics

Filter and sorting options, along number of occurrences, frequent words



## Structure-focused, Word:entry ratio

Identify under or over indexed sections



## Streamline production

Every occurrence for name or place indexes with one click!





# Name and place index Word list – semiautomatically

The screenshot displays a software interface with three main windows:

- Index:** A table with columns: No., Position, Entry, Subentry. It contains two entries:

No.	Position	Entry	Subentry
1	S02W064	winter-time	
2	S02W141	summerhouse	
- Text:** A document window showing a text document titled "How to know the trees". The text discusses tree studies in different seasons and the identification of trees based on their characteristics. The text is partially highlighted in yellow.
- Index-Preview:** A window showing a preview of the index structure. It has two columns: Entry and Idx-Nr. It contains two entries:

Entry	Idx-Nr
summerhouse	2
winter-time	1

# Name and place index – F7

Word List

Search:  375/16195

Reduce to...  
 Index entry  
 Other options  
 Always starting with  
 Empty words  
 Part of phrase  
 Phrases  
 Stop word  
 Substring  
 Word InlineStyle

Exclude...  
 Index entry  
 Other options  
 Always starting with  
 Empty words  
 Part of phrase  
 Phrases  
 Stop word  
 Substring  
 Word InlineStyle

Number	Word	Entries	First position
31	America	0	\$02W437 7
20	Indian	0	\$11W0712 6
20	Jurie	0	\$24W0225 4
18	Europe	0	\$08W168 6
18	Florida	9	\$19W031 7
17	Christmas	0	\$26W1891 9
15	California	0	\$08W014 10
14	Texas	0	\$14W592 5
14	Europear	0	\$26W0707 8
13	England	0	\$08W075 7
12	October	0	\$06W014 7
12	Ohio	6	\$06W316 4
11	English	0	\$08W002 7
10	September	0	\$26W0030 9
10	Japan	0	\$26W2135 5
10	Cak Group	0	\$12W479 9
9	April	0	\$04W498 5
8	Rucky	0	\$12W028 5
8	Southern states	0	\$04W051 15
8	Rocky Mountains	0	\$12W029 15
7	Norway	0	\$24W0554 6
7	Mississippi	0	\$39W207 11
7	Black Oak Group	0	\$12W520 15
6	Arkansas	0	\$04W758 8
6	Unitec	0	\$26W1534 6
6	Alabama	0	\$39W217 7
6	American tree	0	\$22W521 13
6	Norway maple	0	\$24W0555 12
6	Uniter States	0	\$26W1535 13

Text

1 Ohio 2 3

Index: -Standard- Format: 8 / Page range [ ] [ ] [ ]

name may be guessed.

There is another test for a walnut tree, for those who do not know the odour of the sap. Cut a twig, and split it. The pith of walnut trees is not solid, but is in thin plates, separated by air spaces. This is a sure sign.

[Illustration: Three pignuts, with husks, three shagbarks, and two pecans; Howling twig of the little shagbark hickory]

[Illustration: Black walnut and butternut. Twig of butternut, in winter and in spring]

Walnut trees grow rapidly, and are a valuable tree crop to plant. Nuts for seed are packed in gravel, and left outdoors over winter. The stubborn shells are cracked by Jack Frost in such a way as not to injure the seed, which is the meat of the nut. The nuts are planted in spring just where the trees are to stand, for it is much better for a walnut tree never to be transplanted.

I have heard my grandfather tell how the early settlers in Ohio:Ohio cleared the rich bottom land along the rivers. The great trees that had grown, undisturbed, for centuries, were the "weeds" that had to be cut down and removed, before the soil could be ploughed and sowed to oats or wheat. The only way to do this was to burn the trees, by piling them together and firing the pile, as soon as it was dry enough to burn. The "log-rollings" were the neighbourhood gatherings, when men brought their teams and log chains, and worked like Trojans, dragging the logs to the places selected for the giant bonfires, later on. The women and children had a grand time, watching the men at work, and preparing the dinner, which was a feast, and a great social occasion.

The stump of many a noble black walnut tree, cut down a century ago, has stood, undecayed, until recent years. So valuable is its wood that these stumps have been pulled up with expensive machinery, for the gnarly-grained roots that are still sound. Cut into thin sheets, the wood is used for veneering furniture. Think how many millions of dollars' worth of lumber went up in smoke in those bonfires! Black walnut is scarce now, and can hardly be bought at any price.

**The Butternut The Butternut**

The **butternut** trees are stripped of their fruit in October by boys who have visions of long evenings, such as Whittier describes in "Snow Bound," with nuts and apples and cider, by a roaring fire. Some boys leave the black walnut trees to others, and fill their bags entirely from the low, broad butternut trees, that have more nuts in each cluster, and they are not so hard to reach. Many will say that they are much sweeter and richer than black walnuts. Others do not care for them because they are so oily. Indeed, they are called "oil-nuts," and woe to the youngster who has eaten "all he wanted"!

The butternuts are oblong and pointed at one end, and sticky to the touch, differing in this particular from the globular fruits of the black walnut. The same clammy feeling makes it unpleasant to touch the leaves of butternut tree. The resinous sap seems to ooze out through pores along the hairy leaf veins.

In summer time, when the fuzzy, green butternuts are scarcely larger than olives, and their shells are so soft that a knitting-needle goes through without any trouble, the time for making pickled nuts has come. The gathering of the clustered green fruit is fun, but as soon as they are scalded, the "fur" has to be rubbed off of each, before the nuts, husks and all, are put down in spiced vinegar, to be used as a relish for serving with meats the following winter. The "furring" usually falls to the children, and they get very tired, for it is a slow and monotonous job, whether one uses a coarse towel or a brush. However, it would be unpleasant to eat a furry nut, no matter how carefully the spicing was done.

**The English Walnut**

The **English walnut** trees are grown in orchards in Southern California. These trees are quick to grow, and come early into bearing. When you buy a pound of these thin-shelled nuts at the corner grocery store, you may well wonder where they grew. Perhaps little children picked them up under trees that grow in Italy or in Greece. Fine, large nuts come from France, but none of them are related to England. Many of the best nuts are raised in California, where many and more trees of this kind are planted

Index

Filter:  6/17

No.	Entry	Subentry	Index name	2nd:
1	winter time			
2	summerhouse			
31	Florida			
32	Florida			
33	Florida			
34	Florida			
35	Florida			
36	Florida			
37	Florida			
38	Florida			
39	Florida			
40	Ohio			
41	Ohio			
42	Ohio			
43	Ohio			
44	Ohio			
45	Ohio			

# Index-Manager – Consistency



## Different views and overview

Linked window and text views, different sorting options



## Accessibility

Generation of new headings and levels in batch mode, customized: divide entries, swap levels...



## Find & replace

by patterns and regular expressions



## Cross-reference overview

Easy input of cross references





# Index-Manager – Index Quality control



## No typing

Easy input from the source document, anchor button, less error-prone



## Customized functions

Generation of new frequently required operations: divide entries, swap levels, names, acronyms...



## Editing, editing

use all functions for hundreds of entries with one click, standardize spelling, lower/upper case...



## Live Index preview

correct directly within the index preview only once!



## Find & replace

by patterns and regular expressions  
Perl syntax



## Verifying Cross-references

Color code ensures no blind references

# Edit window

The screenshot shows a software window titled "Edit" with a menu bar (File, Mode, Window, Extras, Help) and a search/replace interface. The search field contains the regular expression `{{[0-9-;]+}(.*)}` and the replace field contains `\1\2;\2\1`. Below the interface are two side-by-side tables. The left table has one row with No. 94 and Entry "1,3-galactosyltransferase". The right table has one row with No. 94 and Entry "1,3-galactosyltransferase;galactosyltransferase1,3-".

No.	Entry	Subentry	2nd subentry
94	1,3-galactosyltransferase		

No.	Entry	Subentry	2nd subentry
94	1,3-galactosyltransferase;galactosyltransferase1,3-		

# Index actions window

Index actions

Name:  Find:  rx cs Column:

Shortcut:  Replace:

	Name	Search	Replace	Column	Options	
1	.docx bold	(.+)	<b>\1</b>	Entry	rx	Alt-
2	.docx italic	(.+)	<i>\1</i>	Entry	rx	Alt-
3	.idml bold	(.+)	!!\1!!!;\1	Entry	rx	Ctrl
4	.idml italic	(.+)	**\1***;\1	Entry	rx	Ctrl
5	delete page	(.*)		Page range	rx	Ctrl
6	en dash	#	-	Complete entry		
7	formeln 2	([0-9-,]+)(.*)	\1\2;\2\1	Entry	rx	
8	frame maker	(^.*\$)	\<\$startrange>\1;\1	Entry	rx	
9	index name		Personenregister	Index name		
10	Index name		name index	Index name		Alt-
11	Index place		place index	Index name		Alt-
12	index Sach		Begriffsregister	Index name		
13	Initial Caps	^(.)(.*)	\U(\1\U)\2	Complete entry	rx	
14	initial caps 2	^(.)(.*)	\U(\1\U)\2	Subentry	rxcs	
15	Initial Lows	^(.)(.*)	\L(\1\L)\2	Entry	rx	Ctrl
16	markenregister		n	Index name		
17	Merge 2	((^\ ]*)\ (.*)	\1 \2	Complete entry	rx	
18	Merge levels	((^\ ]*)\ (.*)	\1, \2	Complete entry	rx	Ctrl
19	pagenumberbold		\b	PageNumberFormat		
20	sorting formeln	(.+)	\1;\1	Entry	rx	
21	split	(.)(.)(.*)	\1\2	Entry	rx	

# Index-Actions example

Name	Search	Replace	Column	Options	Shortcut	
.docx bold	(.+)	<b>\1</b>	Entry	rx	Alt+B	Oak -> <b>Oak</b>
.docx italic	(.+)	<i>\1</i>	Entry	rx	Alt+I	Oak -> <i>Oak</i>
.idml bold	(.+)	!!\1!!!;\1	Entry	rx	Ctrl+Alt+B	
.idml italic	(.+)	##\1###;\1	Entry	rx	Ctrl+Alt+I	
Index name		Names index	Index name		Alt+N	
Index place		Places index	Index name		Alt+P	
Initial Caps	^(.)(.*)	\U(\1\U)\2	Complete entry	rxcs	Ctrl+Alt+C	oak -> Oak
Initial Lows	^(.)(.*)	\L(\1\L)\2	Complete entry	rxcs	Ctrl+Alt+L	Oak -> oak
Merge levels	([^\]]*)(.*)	\1, \2	Complete entry	rx	Ctrl+Alt+M	American Oak -> American, Oak
Swap level	([^\]]*)(.*)	\2 \1	Complete entry	rx	Ctrl+Alt+S	Oak American -> American Oak
Swap name	(.*) (.*)	\2, \1	Entry	rx	Ctrl+Alt+N	John Miller -> Miller, John
Swap parenthesis	(.*) \((.*)\)	\2 (\1)	Entry	rx	Ctrl+Alt+T	UN (United Nation) -> United Nation (UN)
Forced sorting	(.+)	\1;\1	Entry	rx		"glutamate";glutamate



Why embedding indexing  
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# Index-Manager – embedded

Entries are written into the export program's own fields. Easy processing by the target publishing program

- Word:
 

```
{XE "Kopernikus, Nikolaus"}
{XE "Kopernikus, Nikolaus" \f "name"}
{XE "star signs:Aries"}
```
- XML:
 

```
<indexentry levels='Iron|Mining'/>
<indexentry><entry1>Anamnesis</entry1></indexentry>;
<indexentry><entry1>Diagnostics</entry1><entry2>surgical methods of</entry2></indexentry>
```
- DocBook:
 

```
<indexterm><primary>MyLife project</primary></indexterm>
```
- combined with a thesaurus
 

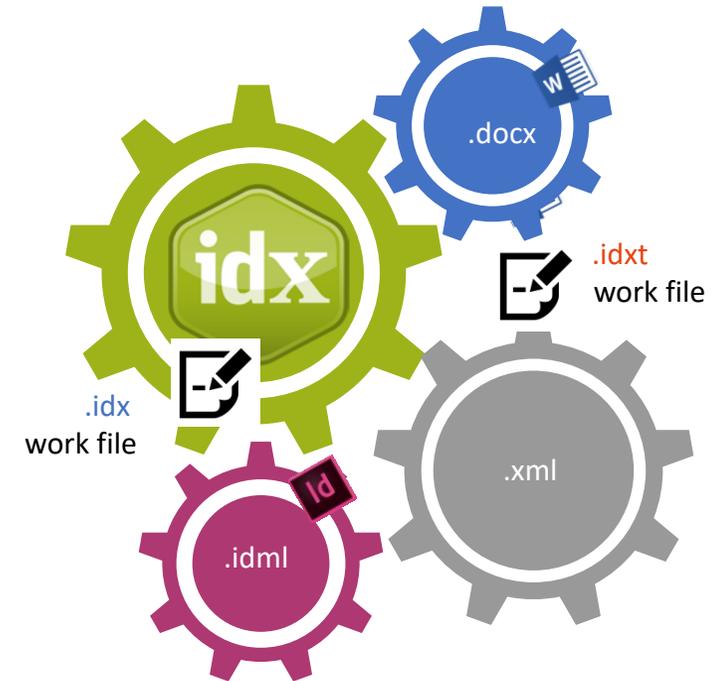
```
<indexentry><entry1> surgical methods of Diagnostics</entry1><concept cidref="CO3456" type="Thesaurus" level="1"/></indexentry>
```

# Work file logging – .idx(t)

- Index information is not written back immediately
- embedding of entries
  - at any point in time
  - into changed/edited versions of the source files (.idx)
  - into other format versions of the source files (.idx(t)) – Transfer Add-on

## Advantages:

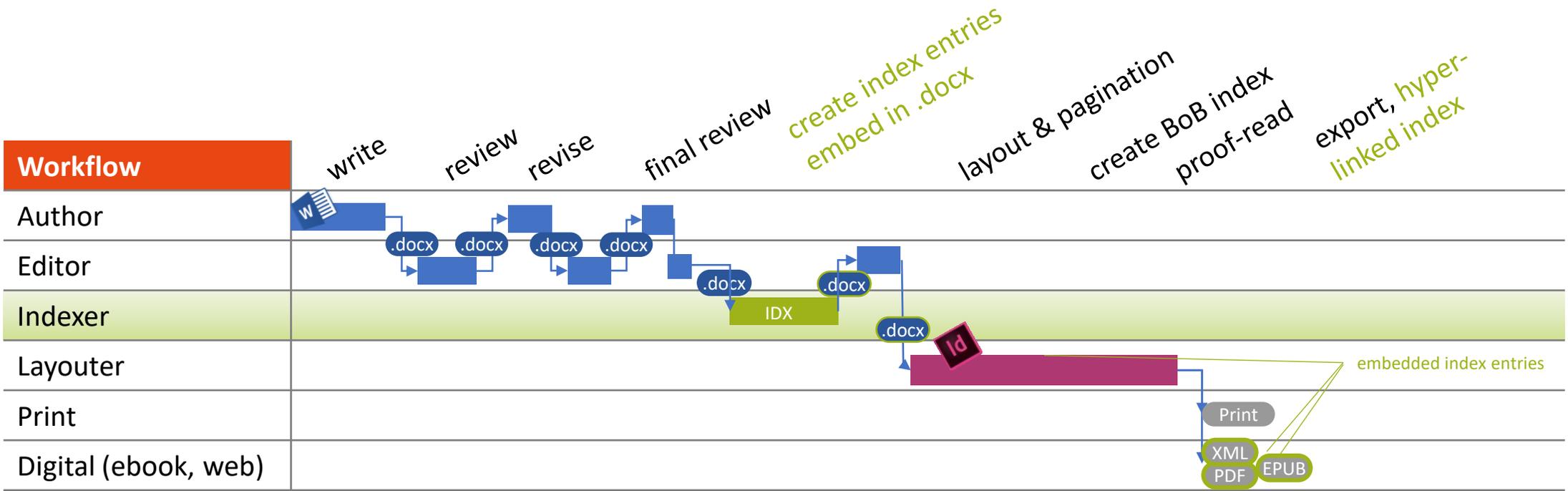
- allows tasks like copyediting, typesetting in parallel
- exchange work files with publisher (data sovereignty)
- highly flexible production workflow
- several indexers can work in parallel
- fresh work file as Backup for new editions



# Book production workflow

## A: Word → Word, same version

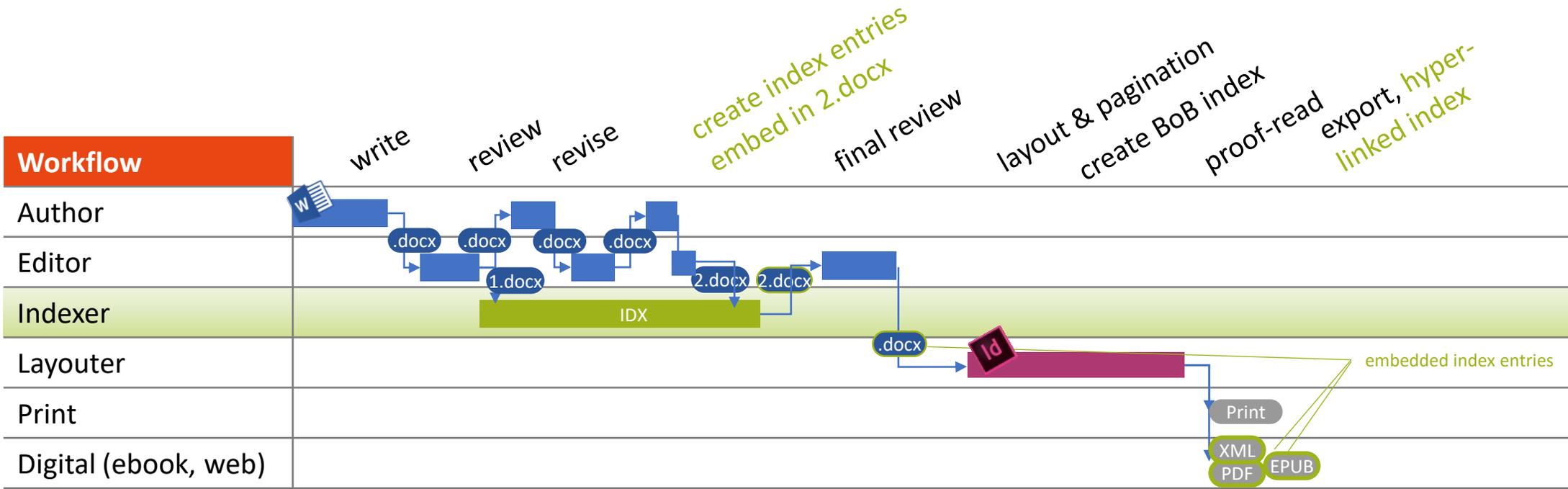
- Advantage: embedded
- Advantage: File exchange only once
- Problem: critical path, Word → InDesign Transfer



# Book production workflow

## A\_1: Word → Word, two document versions

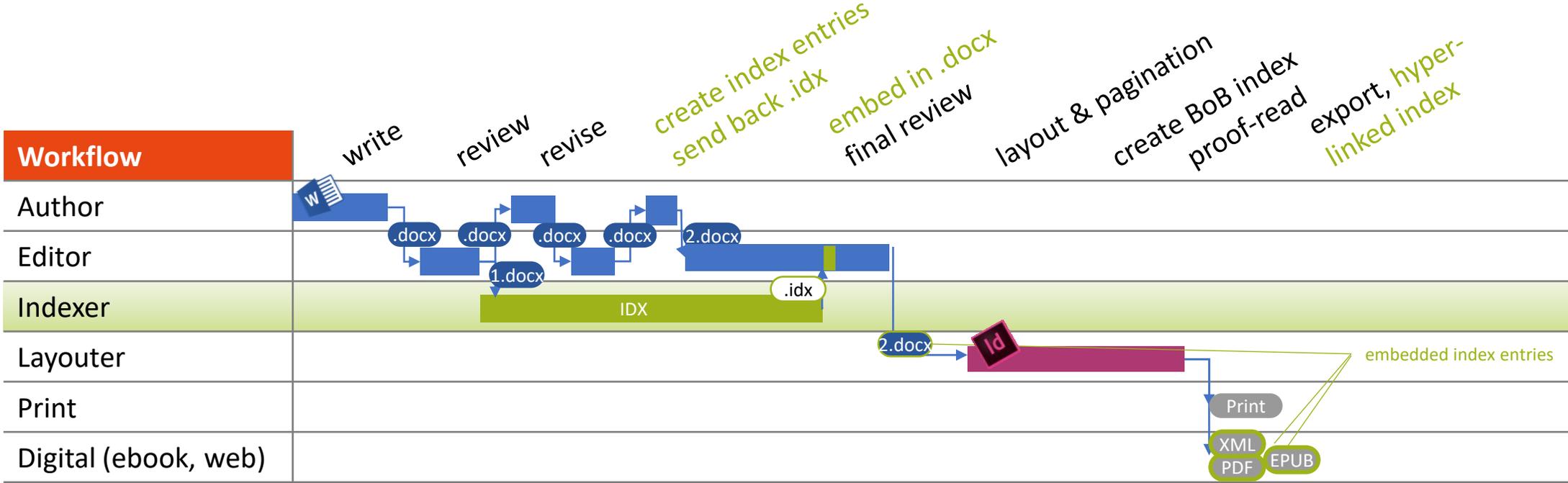
- Advantage: embedded
- Advantage: no time loss
- Problem: Word → InDesign Transfer



# Book production workflow

## A\_2: Word → Word, .idx exchange

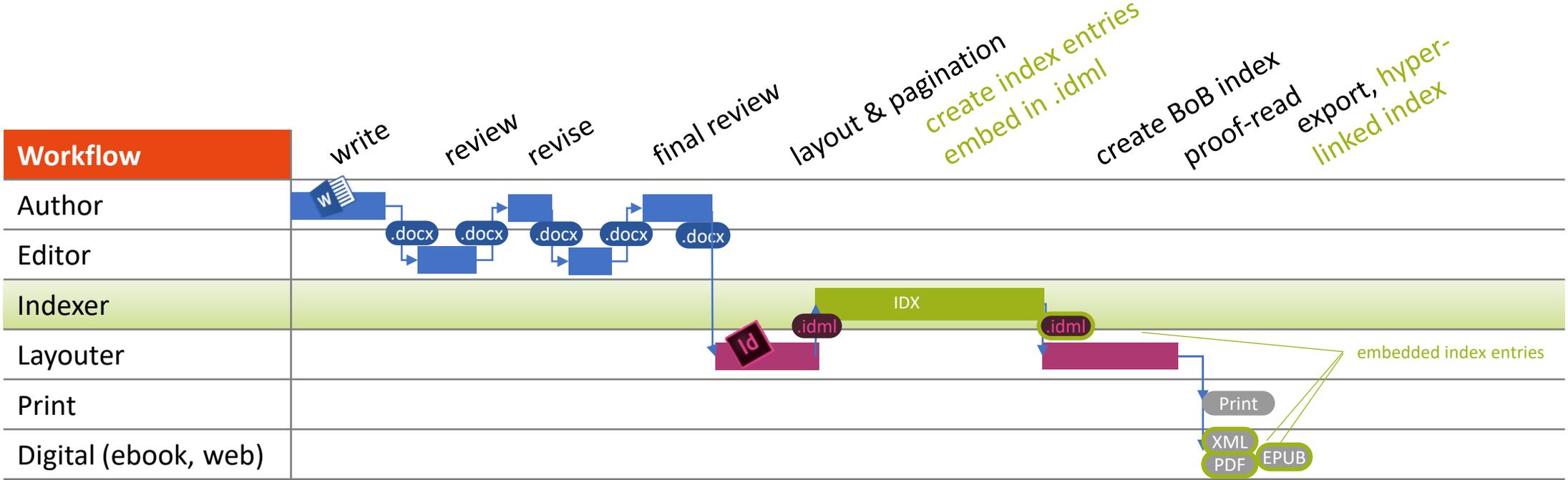
- Advantage: embedded
- Advantage: no time loss, data sovereignty
- Problem: Word → InDesign Transfer



# Book production workflow

## B: InDesign → InDesign, same versions

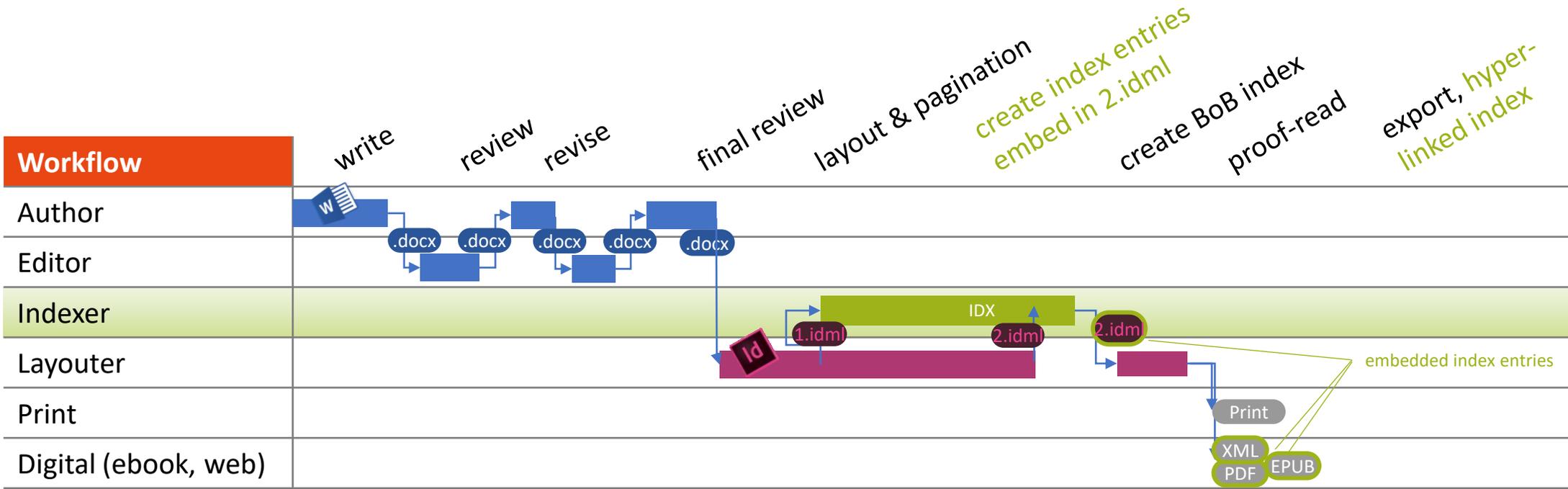
- Advantage: embedded
- Advantage: no Word → InDesign transfer
- Problem: compatibility problems with different InDesign versions



# Book production workflow

## B\_1: InDesign → InDesign, two document versions

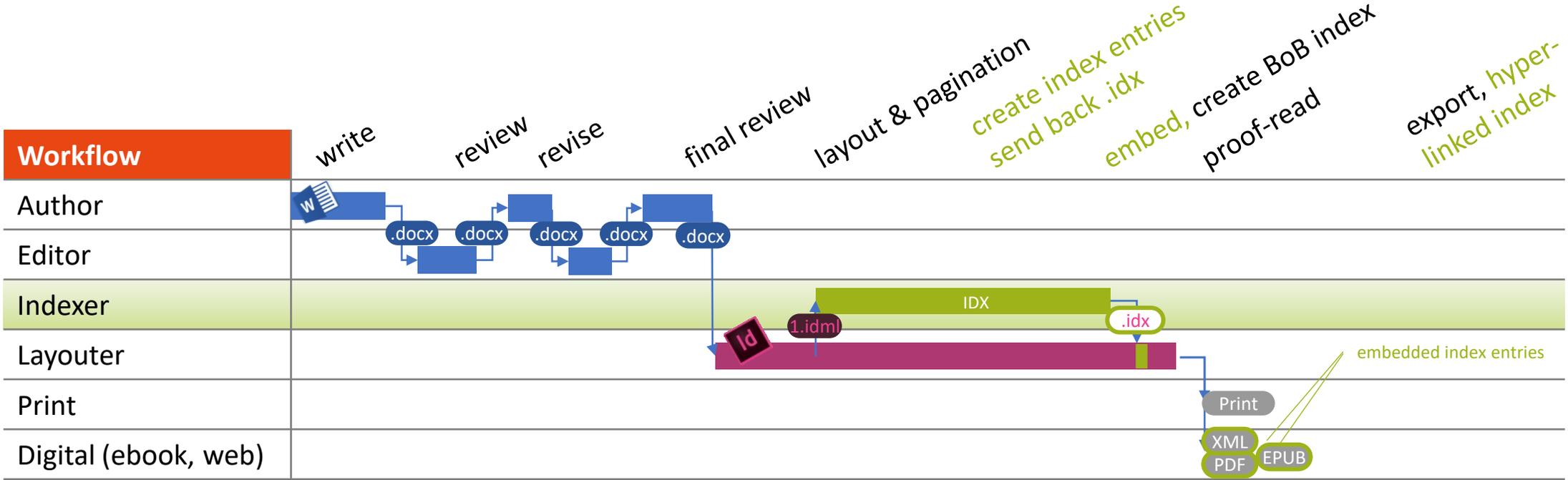
- Advantage: embedded
- Advantage: no Word → InDesign transfer
- Problem: compatibility problems with different InDesign versions, 2x .idml-export



# Book production workflow

## B\_2: InDesign → InDesign, idx.exchange

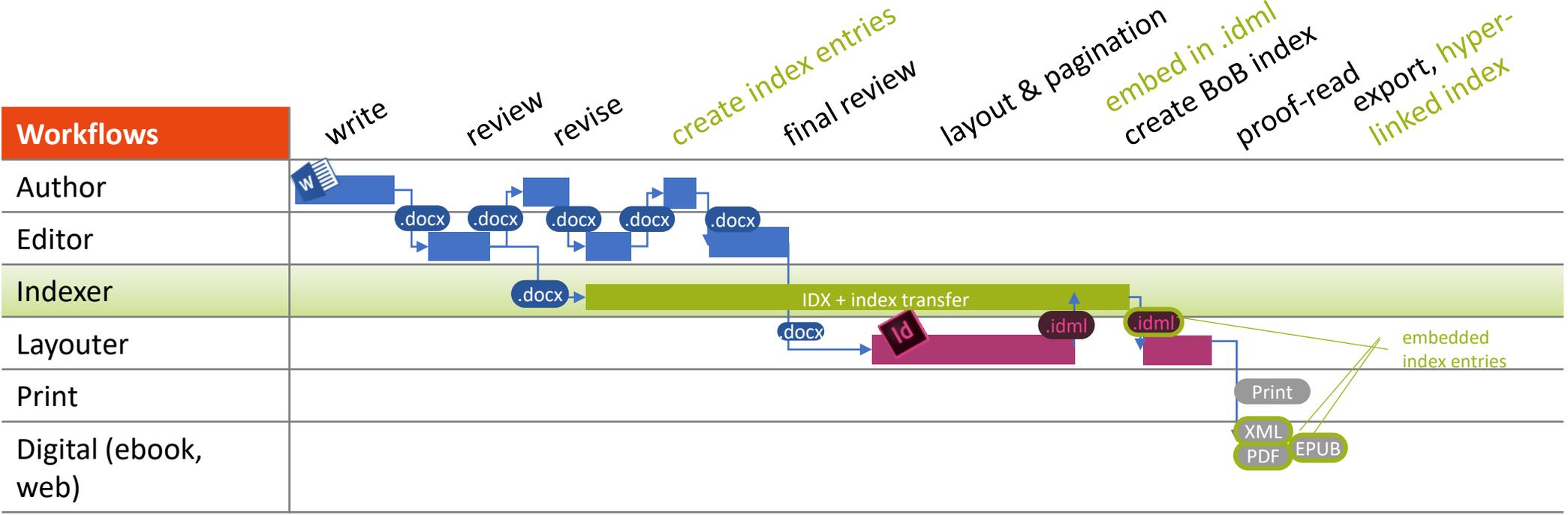
- Advantage: embedded
- Advantage: no Word → InDesign transfer, data sovereignty
- Indexer and Publisher need idx licenses



# Book production workflow

## C: Word → InDesign, Index-transfer

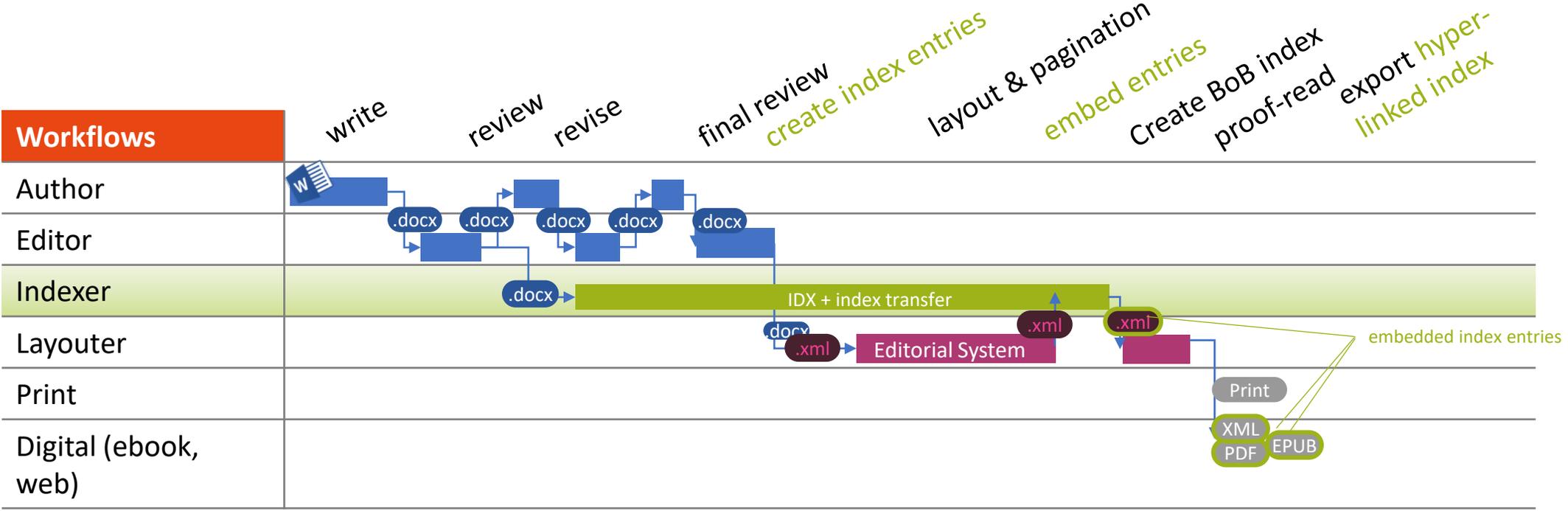
- Advantage: embedded
- Advantage: no time loss, defined customized tag format
- Indexer needs Index-Manager with Add-on



# Book production workflow

## D: XML-First, Word → XML, Index-transfer

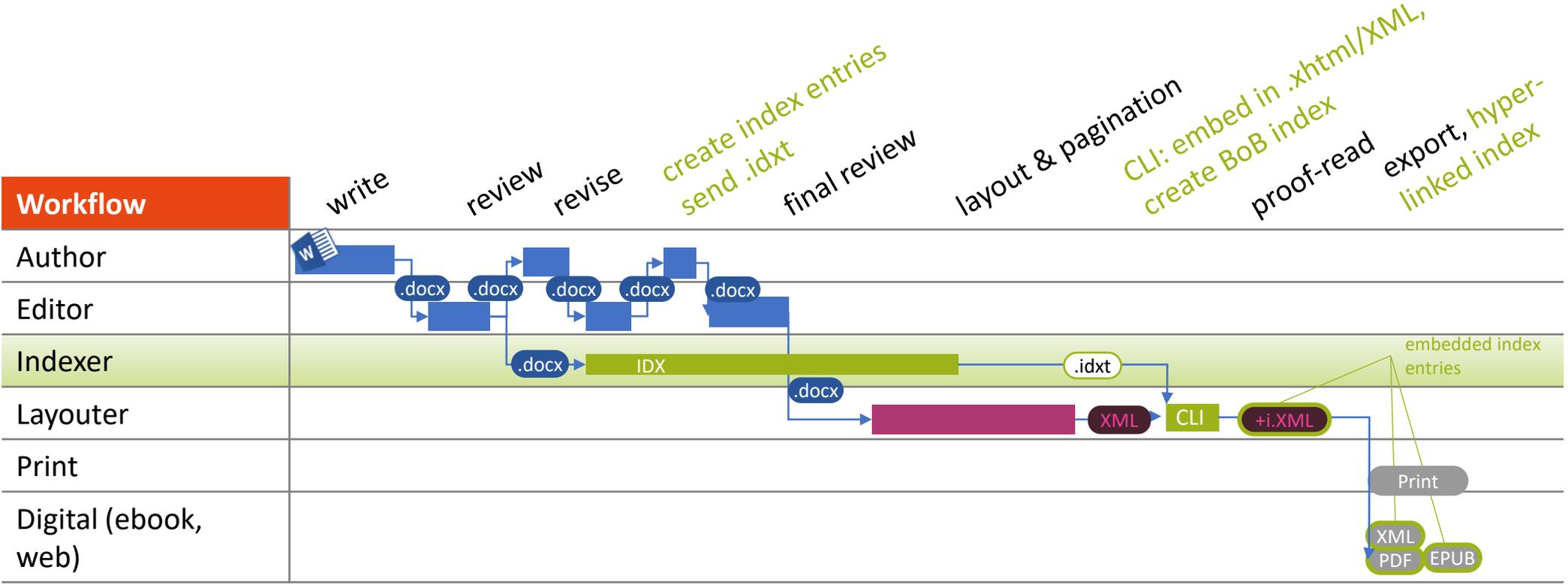
- Advantage: embedded
- Advantage: no time loss, defined customized tag format
- Indexer needs Index-Manager with Add-on



# Book production workflow

## E: Word → XML, .idxt, CLI

- Advantage: embedded
- Advantage: no time loss, data sovereignty, defined customized tag format
- Indexer and Publisher need Index-Manager with Add-on



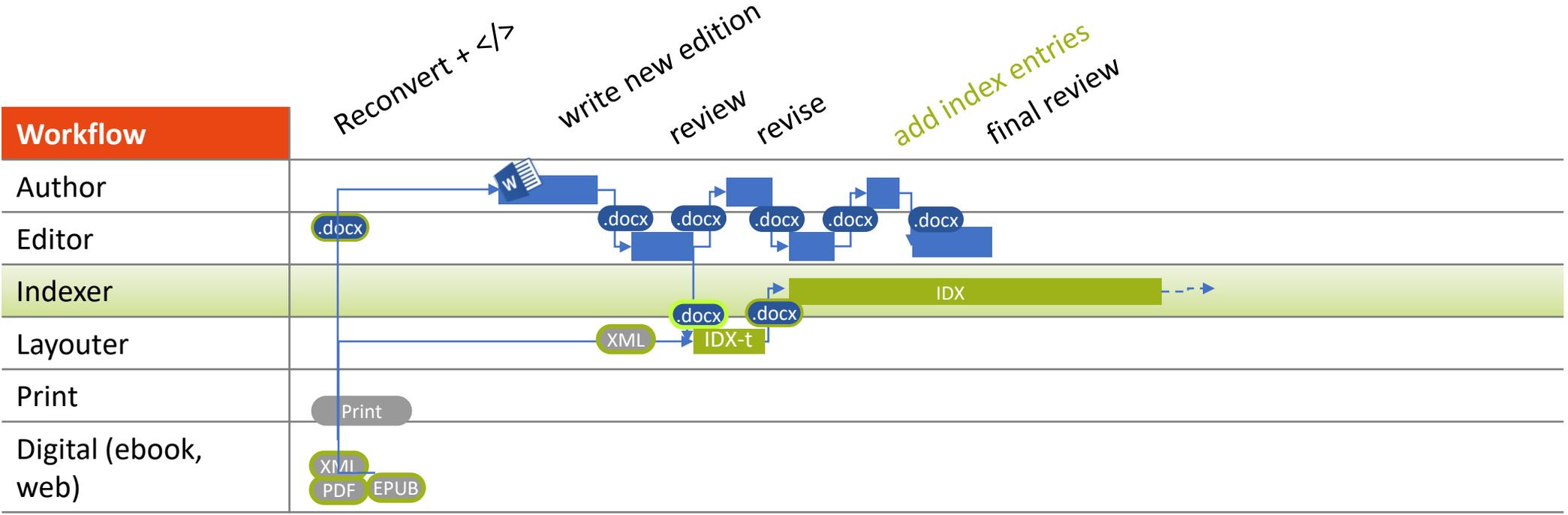
# CLI (Command line interface)

- Add-on Index-Transfer: in combination with Index-Manager Business License
- Functions:
  - CLI version of Index-Manager is used for integration into fully automatic production workflows
  - Works fully automatically without any user interaction
  - It takes a publication document (in XML / XHTML) and embeds the .idx entries
  - Can transfer .idx entries across file formats (e.g. embed .idx entries from WORD into XHTML)
  - If the publication is paginated (in XML / XHTML), it can automatically build the Back-of-the book index
  - When embedding into custom XML or XHTML, the tags can be customized to customer requirements

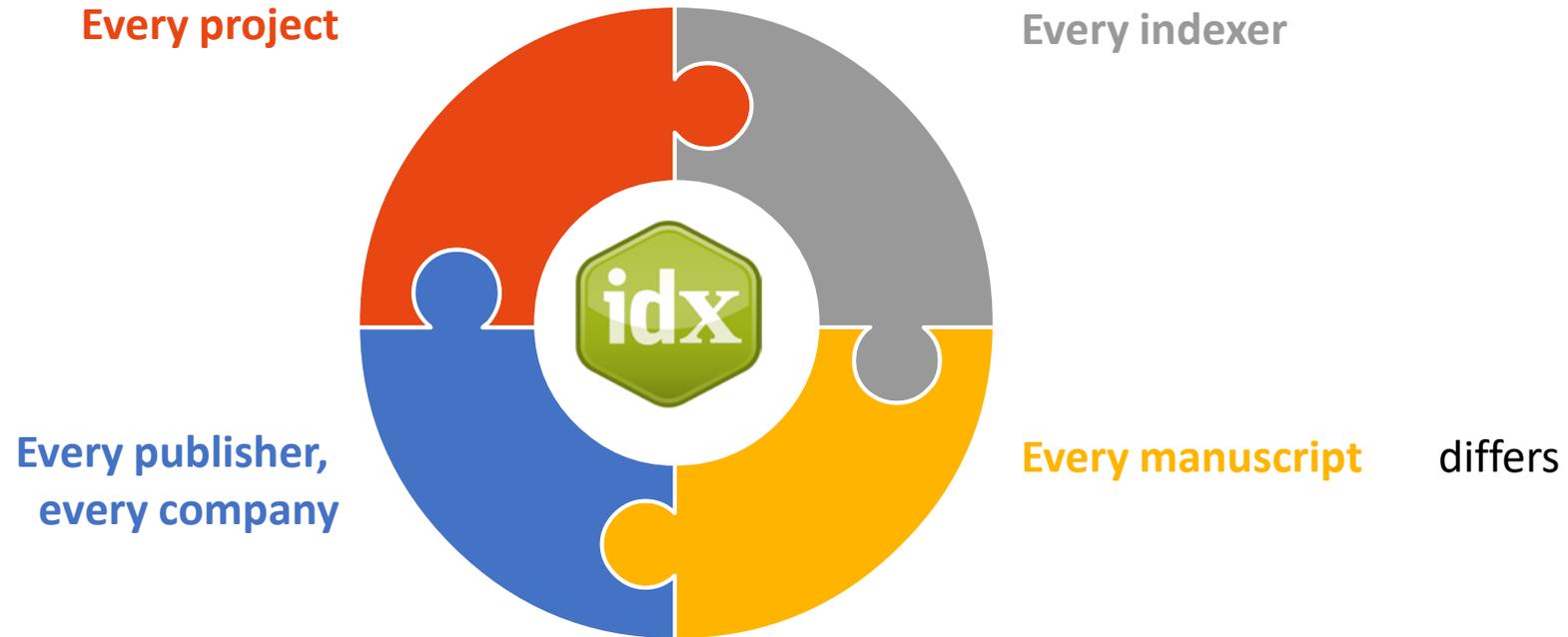
# Book production workflow

## Version New edition: XML → Word, Index-transfer

- Advantage: embedded
- Advantage: no time loss, index-backup in case author deletes entries
- Publisher needs Add-on



# Flexible modern software

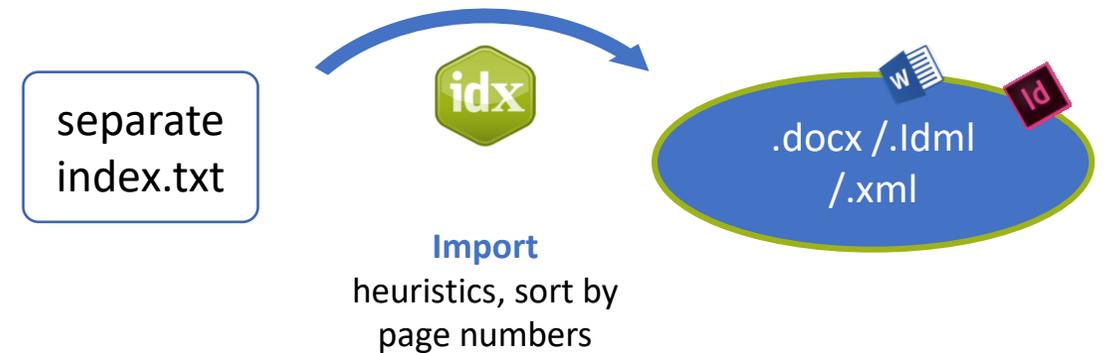


**However you want to do it, Index-Manager is by your side**

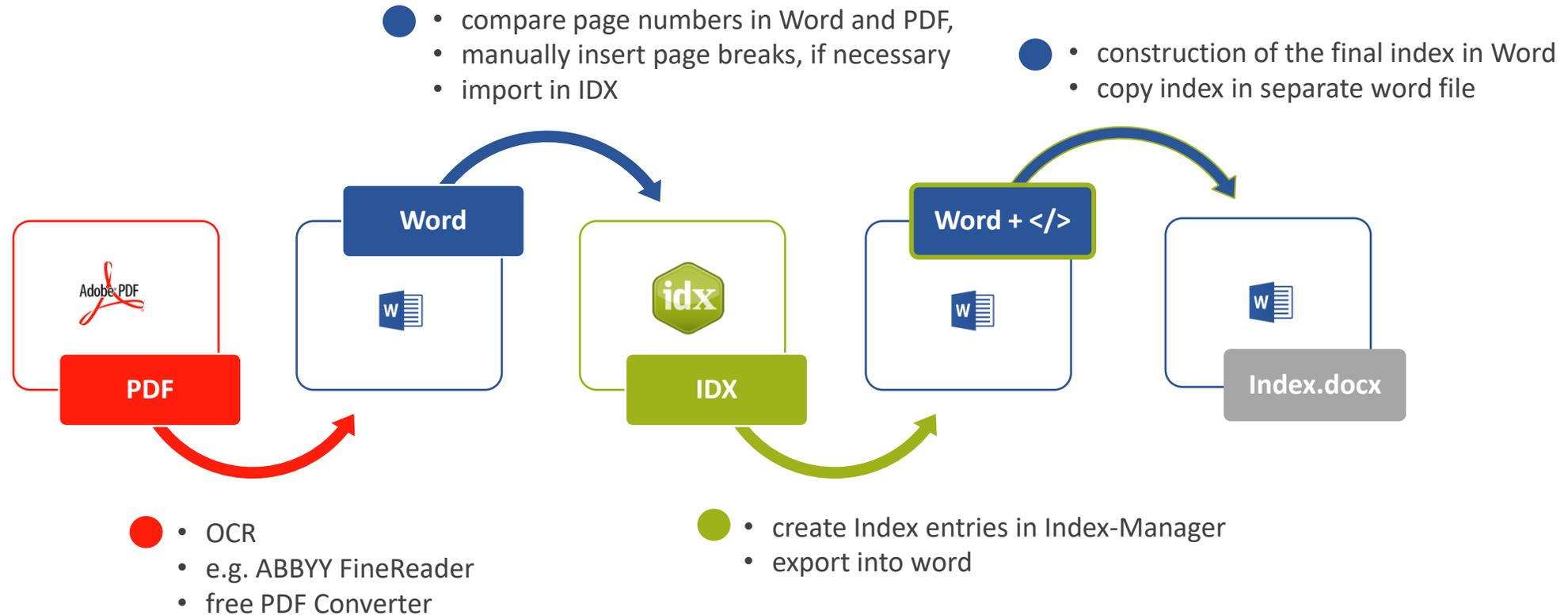
# Add-on Index-Import

Import of an existing separate index as .txt

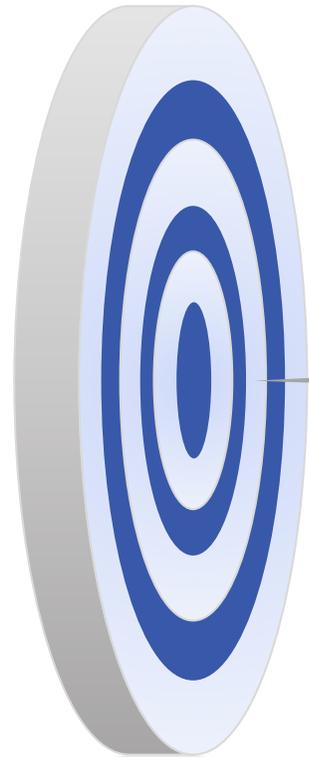
- index import format conversion: yourself with instruction manual, Klarso, IndexConvert...
- manually controlled or automatic embedding
- **However you want!**



# BoB in Index-Manager



# How we are innovative – Transformation in Indexing



## earlier

parallel workflows allows earlier publishing



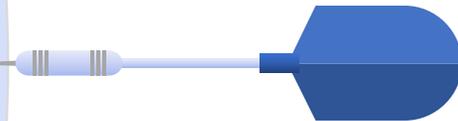
## future proof

precisely embedded entries for all future products and editions, print or digital



## flexible

Index-Manager fits all workflow requirements due to Work file logging and Add-ons



## better

analysis and QS functions ensure indexes become more

- Complete
- consistent and
- Accurate

## faster

- Modern user interface motivate indexers
- editing functions free from mundane aspects and
- make indexing even faster
- heuristic and analysis features facilitate the choice of relevant terms



1 Why embedding indexing  
Digital publications

2 What's the reality now  
BoB index and Critical path

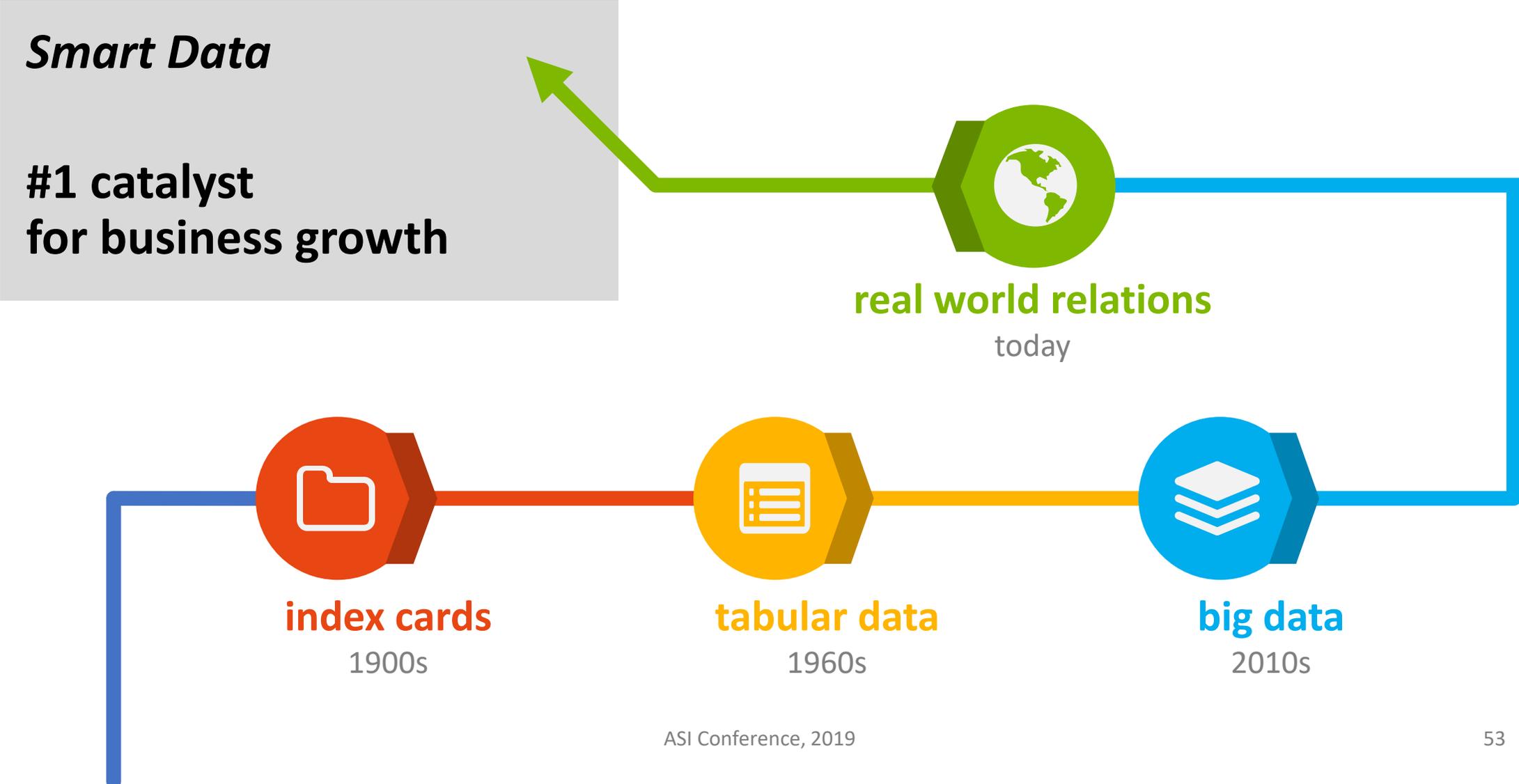
3 How we are innovative  
Transformation in Indexing

4 How Index-Manager facilitates indexing  
From term selection to quality check

5 When is embedded indexing done?  
Manuscript, e.g. in Word, Layout e.g. in InDesign...

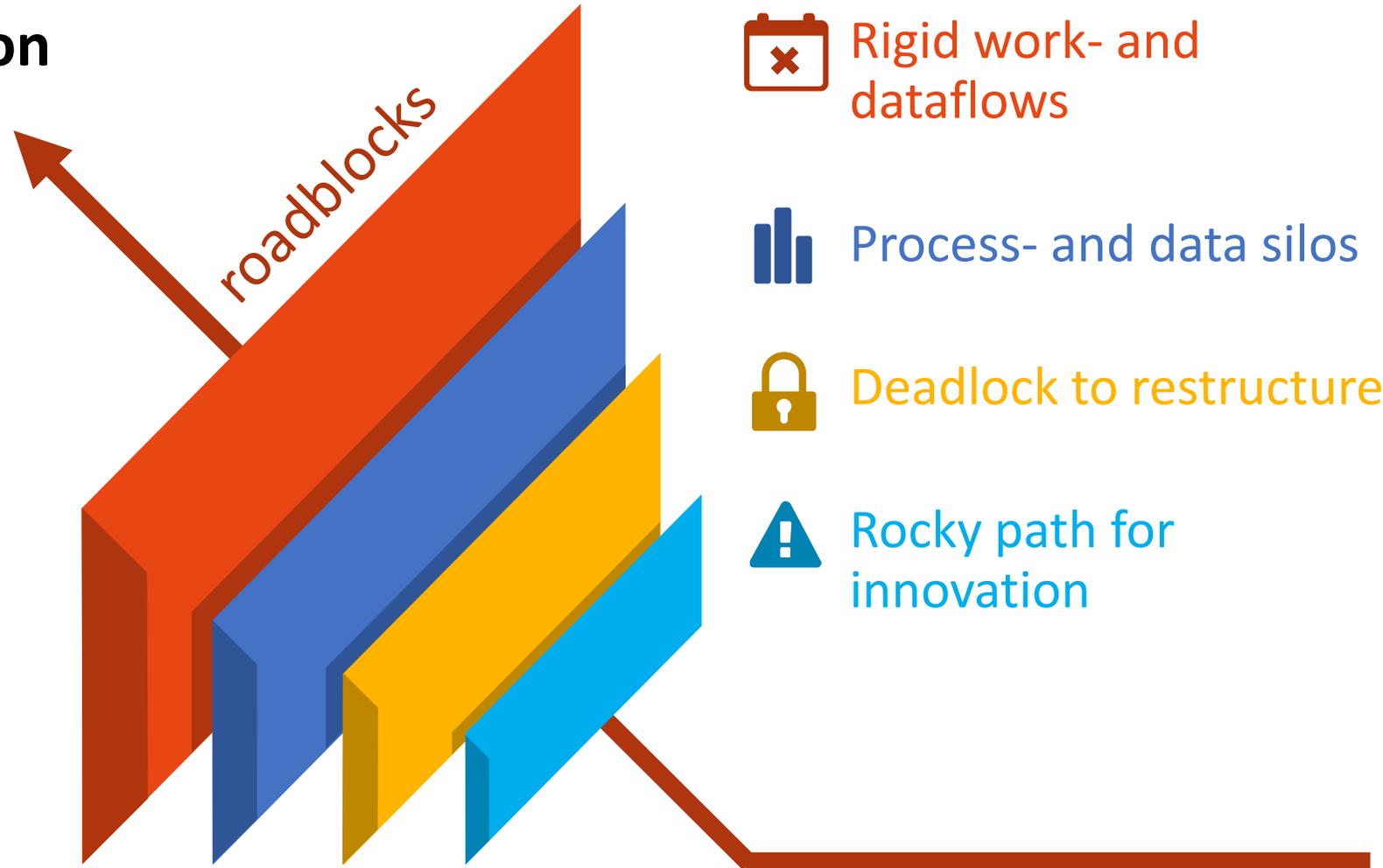
6 Where we are headed and what we offer  
Smart Data with *klar:suite* solutions and  
Index-Manager subscription plans

# Shift in the Information Landscape



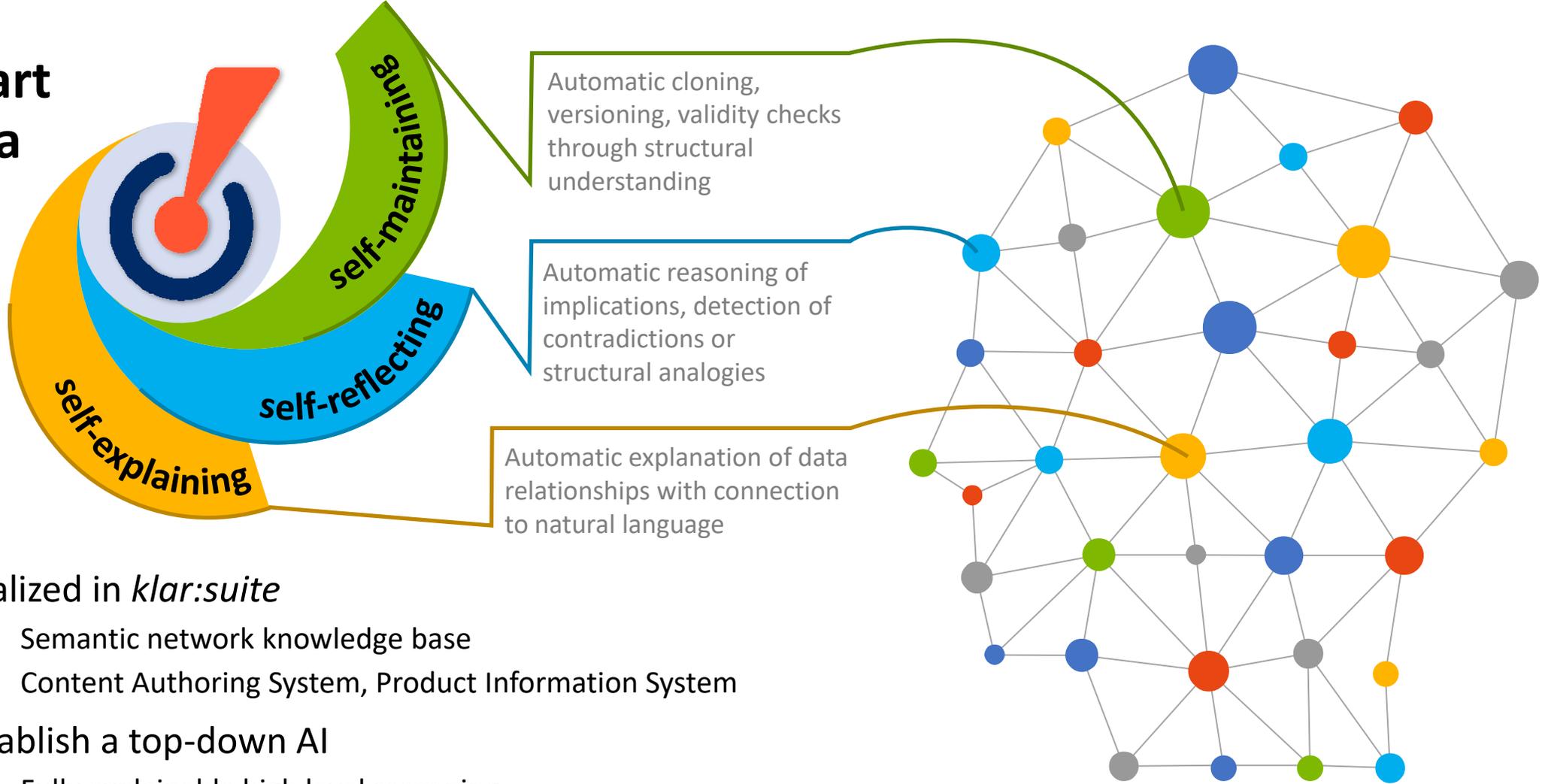
# Challenges to Building the Smart Data Future

- **True transformation**
- **Customer first**
- **Highly innovative technology**



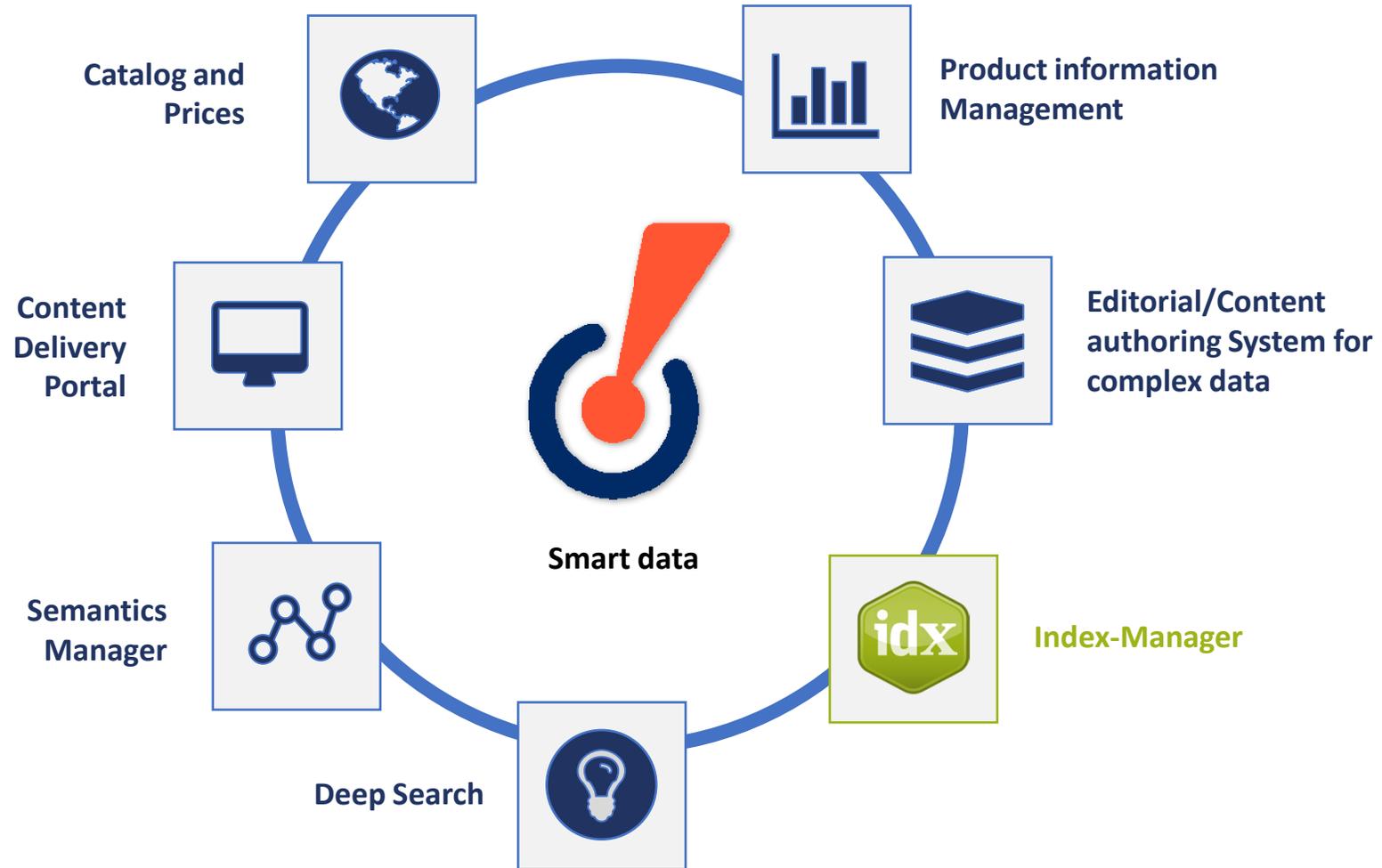
# Smart Data to Create Your Top-Down Artificial Intelligence

## Smart Data



- Realized in *klar:suite*
  - Semantic network knowledge base
  - Content Authoring System, Product Information System
- Establish a top-down AI
  - Fully explainable high level reasoning

# Our Portfolio





1 Why embedding indexing  
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# Requirements

- Desktop application
- Windows 7, 8, 10, MacOS, Linux (on request)
- min. 1 GB RAM available
- Payment: Subscription model



Licenses for InDesign are **not** necessary for working in IDX

Embedding of the entries is done by IDX  
Open source documents for quality control only  
construction of the final index by publisher

# Premium Training and Support



**In-house classes**  
available

**Context help**

context help integrated in the program user interface

**YouTube tutorials**  
demonstrate the most important functions

**Live webinars**

Free webinars, basic and advanced, every two weeks



**Chat**

Via Skype and TeamViewer

**Forum**

Community help

**Email**

Fast response times

**Telephone**

Mobile accessible



Test license, 2 weeks  
Free Webinars, every 2 weeks



### Webinar – Index-Manager Basic

You will learn how to:

- import and open files
- help functions
- adapt layout: add or remove windows, adjust size and position
- create index entries and toolbar functions: main- and subheadings, index names, page formats and -range, forced sorting
- edit index entries
- export
- Q&A

Next webinar: Tuesday May 7th, 6:00 pm Central European Summer Time, 5:00 pm British Summer Time, 12:00 pm Eastern Daylight Time, 11:00 am Central, 10:00 am Mountain, and 9:00 am Pacific Time (US and Canada).

### Webinar – Index-Manager Advanced

You will learn about:

- insert new functions: index actions
- cross reference editor
- quality check of the final index
- word list functions: Filter options, F6 and F7
- context window
- different file formats e.g. InDesign and Word
- editing, editing and editing
- regular expressions
- replacing source documents with new versions, step by step
- Add-ons: Index-Import and Index-Transfer
- Indexing integration in book production workflows
- Q&A

Wednesday May 8th, 6:00 pm Central European Summer Time, 5:00 pm British Summer Time, 12:00 pm Eastern Daylight Time, 11:00 am Central, 10:00 am Mountain, and 9:00 am Pacific Time (US and Canada).

Your email address\*

Webinar\*

I agree to the privacy policy and terms and conditions.\*  
 Yes, I would like to receive emails to stay up to date on new developments about Index-Manager.

All fields marked with \* are necessary for your registration.

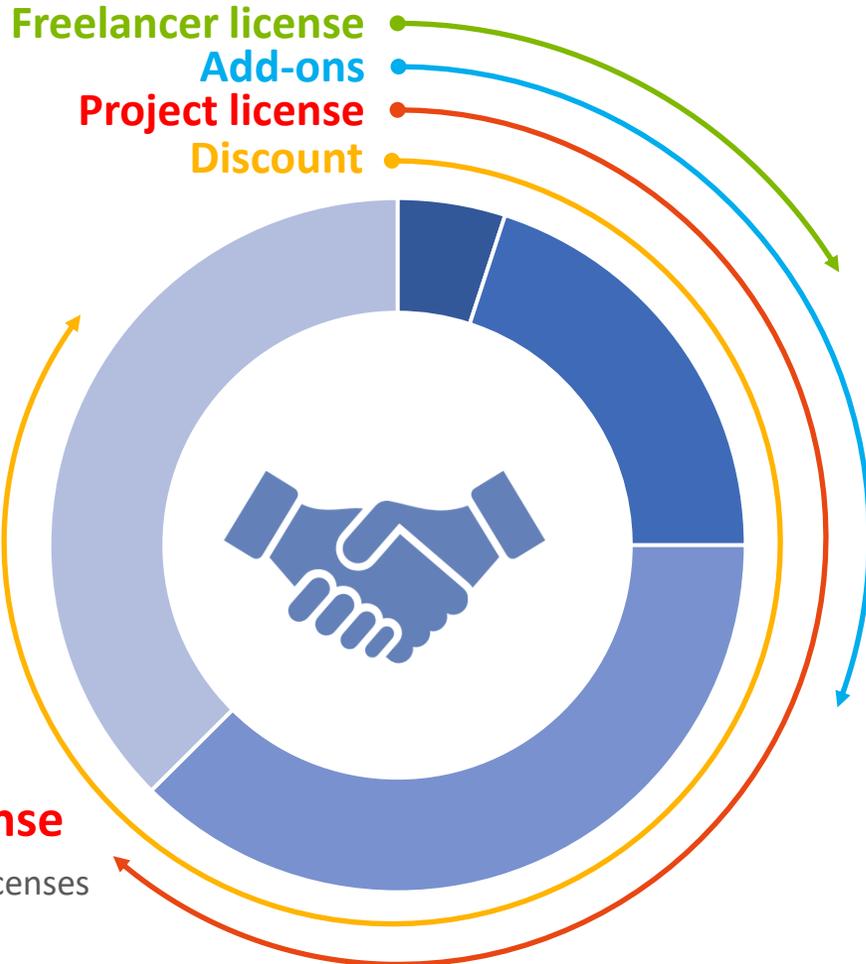
Klarso GmbH  
Berlin  
E-Mail: [info@klarso.com](mailto:info@klarso.com)  
E-Mail: [info@index-manager.net](mailto:info@index-manager.net)  
Web: [klarso.com](http://klarso.com)



**Dr. Katharina Munk**  
[info@index-manager.net](mailto:info@index-manager.net)

Katharina Munk, a trained biologist, has worked since 1992 as a lecturer, author, editor, and indexer on large projects in biology and medicine. She initiated and has been closely involved in the development of Index Manager (Idx) since its inception. The first version of Index Manager was presented at the Frankfurt Book Fair in 2012.

# Pricing



## Discount, Freelancer License

15% discount for ASI Conference  
Offer expires 2019-07-31,  
only for new customers

## Freelancer License, \$ 399,00

1 year, per seat, Premium support

<https://index-manager.net/en/prices>

## Add-ons

Index-Transfer: \$ 113,00  
Index-Import: \$ 113,00  
1 year, requires valid Index-Manager license,  
training personal online lessons

## Publisher Indexer license

Publisher forwards project licenses  
to freelance indexer  
Price by request  
Add-ons inclusive  
minimum purchasing quantity: 10  
licenses / Quarter



## Thank you for listening

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