

Scottsdale, ASI, Conference

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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

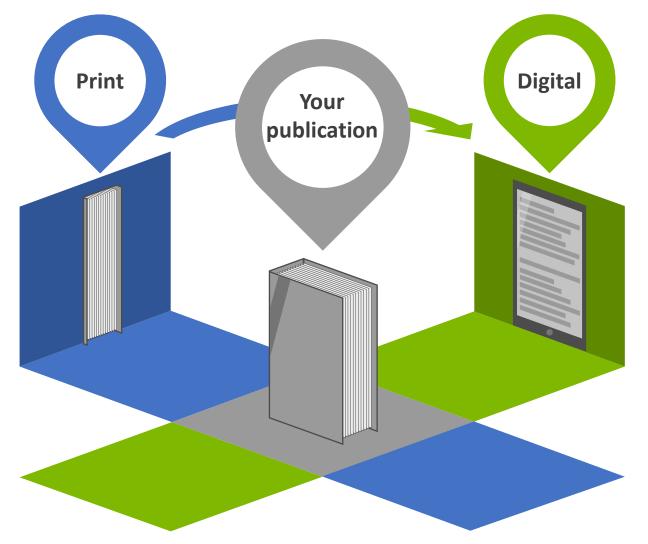
Publications are Changing Fundamentally Change your Perspective



Stack of pages Linear reading

Page numbers for

- Table of contents
- Cross-references
- BoB-Index



Stream of text Non-linear reading

Direct links for

- Table of contents
- Cross-references
- Index / search

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



manual labor





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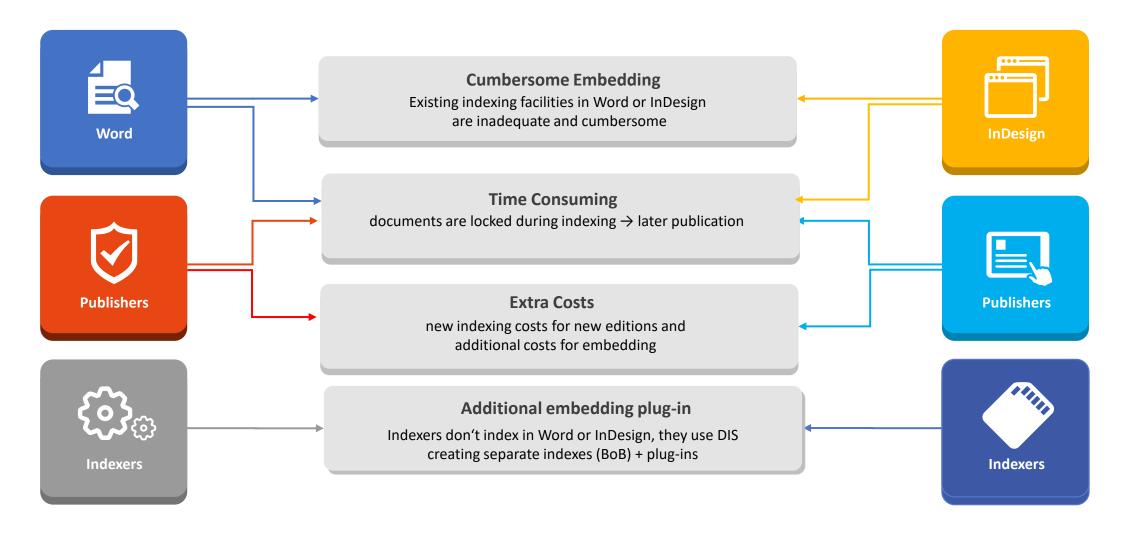
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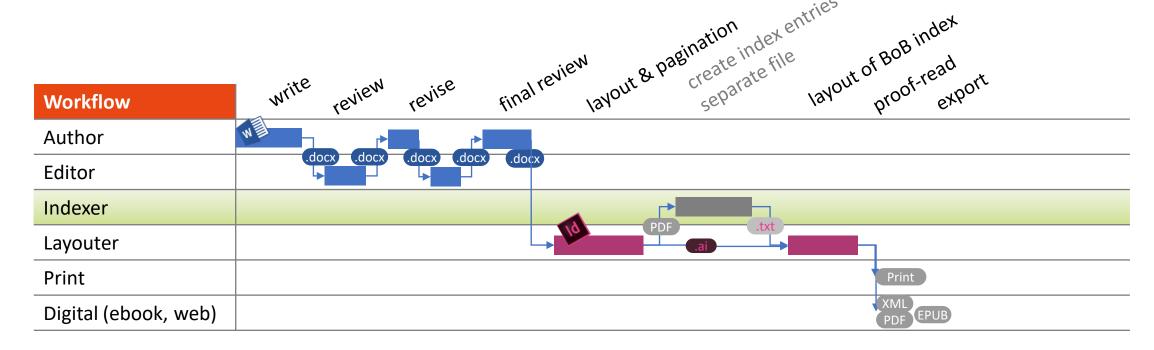
The reality for embedding indexing now



Book production workflow Version A: reality now – BoB index and critical path



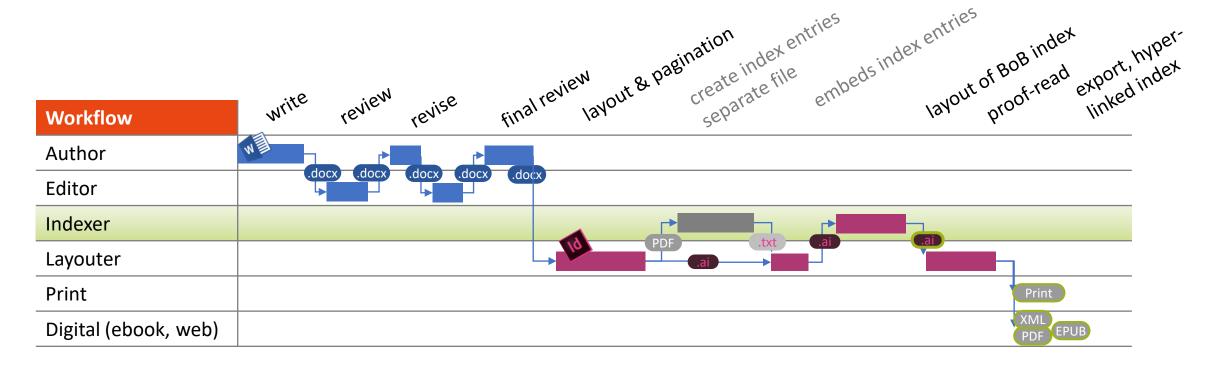
- Advantage: Indexers can use the dedicated software they are used to
- Problem Indexer: last minute indexing
- Problem Publisher: no hyperlinked index entries, additional costs for new editions



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 sovereignity
- Problem: index is incorrectly linked (e.g. just to top of §), this is not helpful to the readers' experience

Print

web)

Digital (ebook,

?: embed entries top of s in XML/Al, Problem: additionally create § version, embedding tool (?) create index entries linked index layout & pagination create BoB index write Workflow Author .docx **Editor** Unprecisely embedded Indexer index entries .docx Layouter

PDF EPUB







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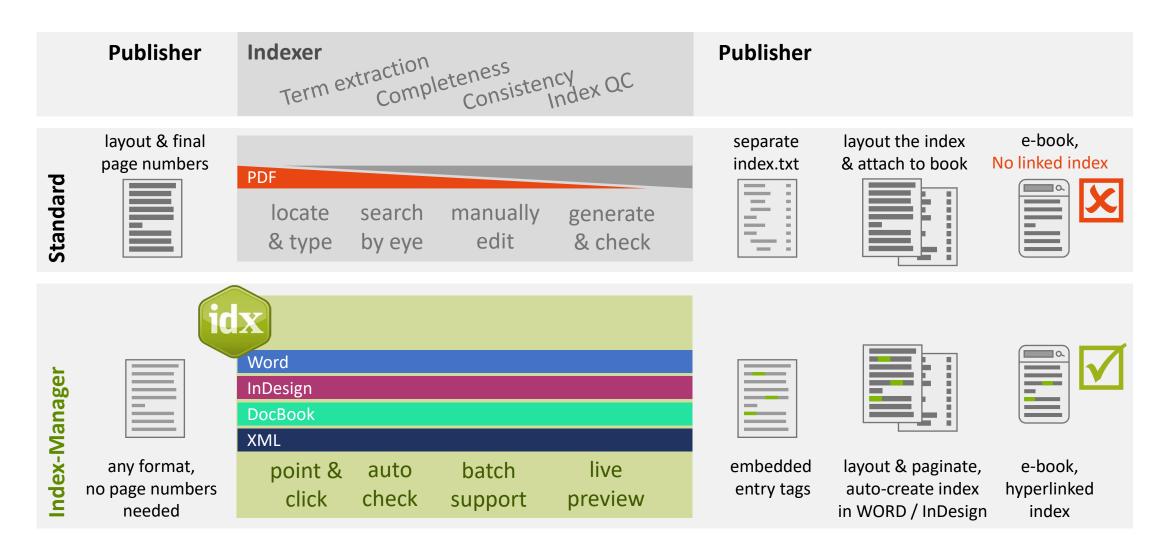
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Index-Manager Flexible workflow, faster indexing, better index, fit for digital







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

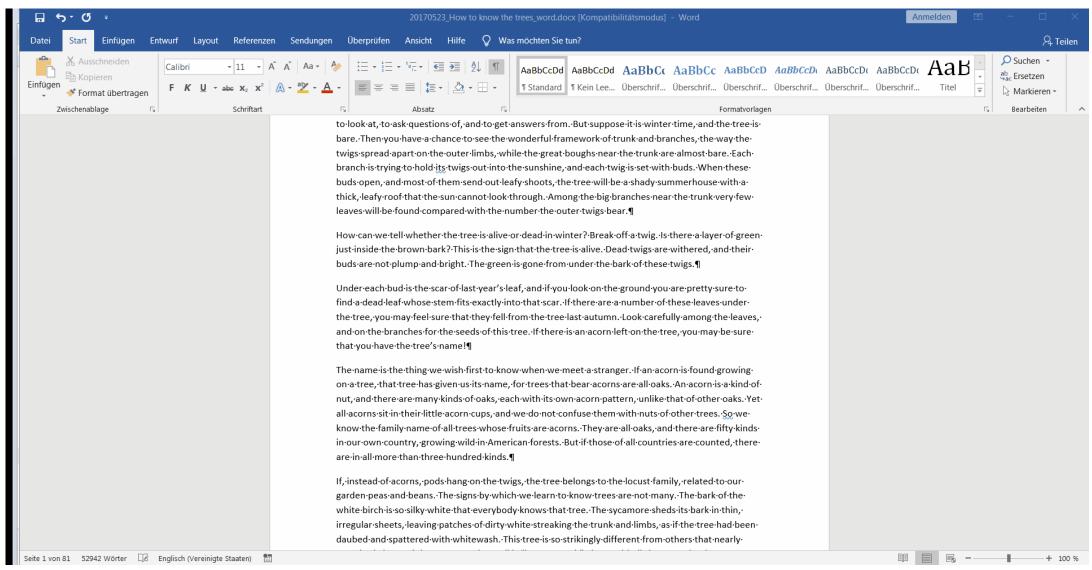
Index-Manger offers the same functionality (and more) as other dedicated indexing tools and

it also inserts the index entries into the document files





Indexing in word





Import and entire process in Index-Manager







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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











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

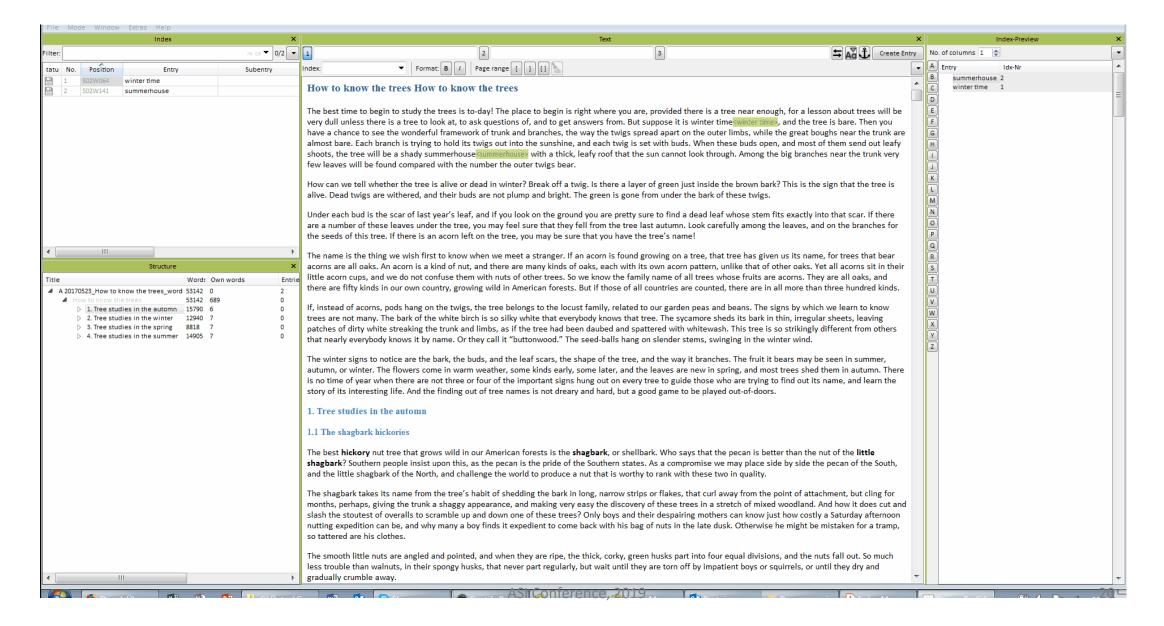


External resources

"Load word list file", concordance list, terminology

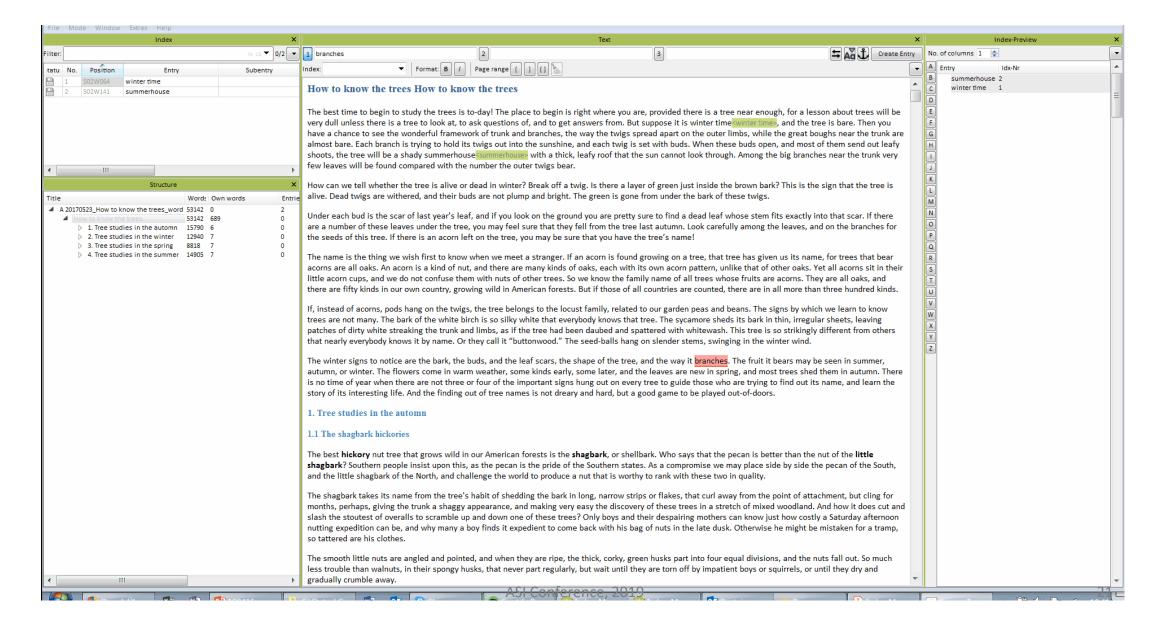


Term extraction – Search in text



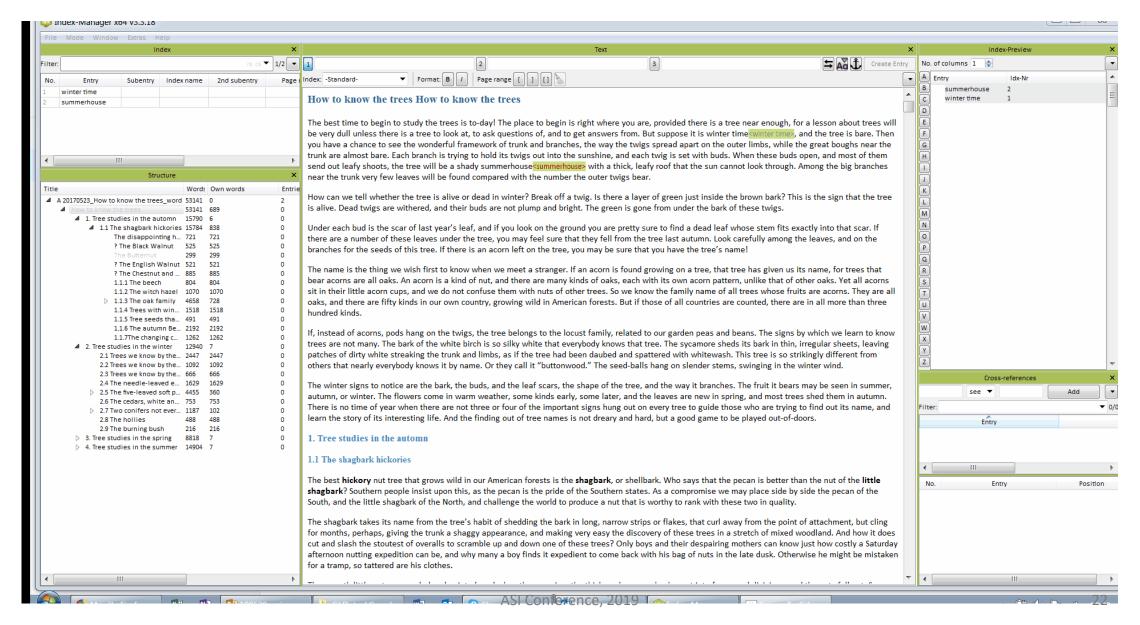


Term extraction – Search in context





Term extraction – search in word list





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!

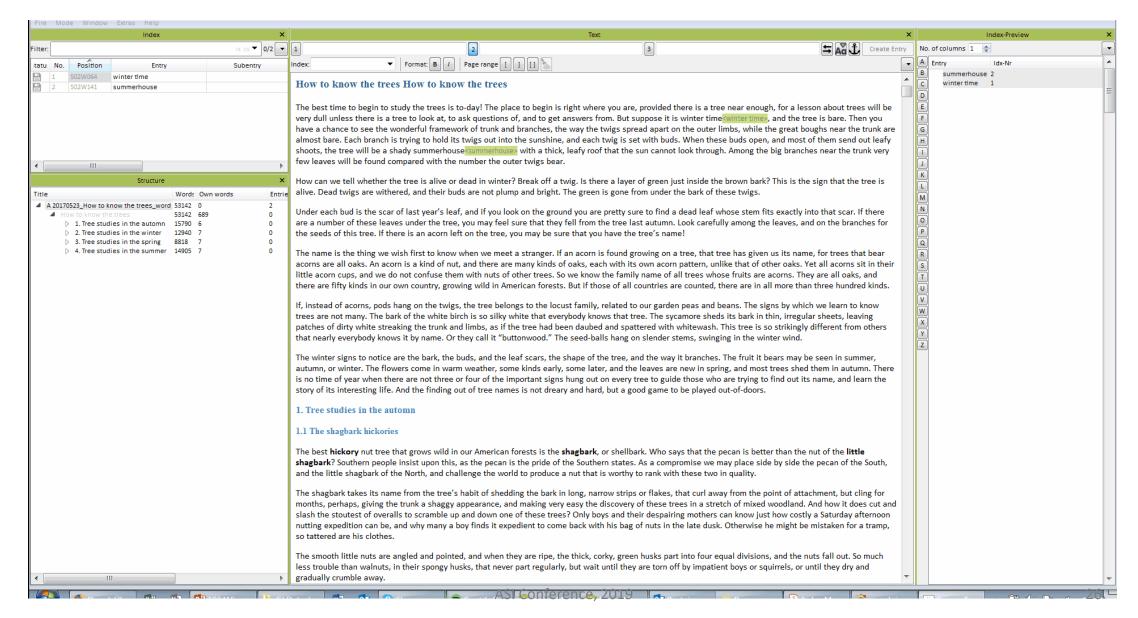






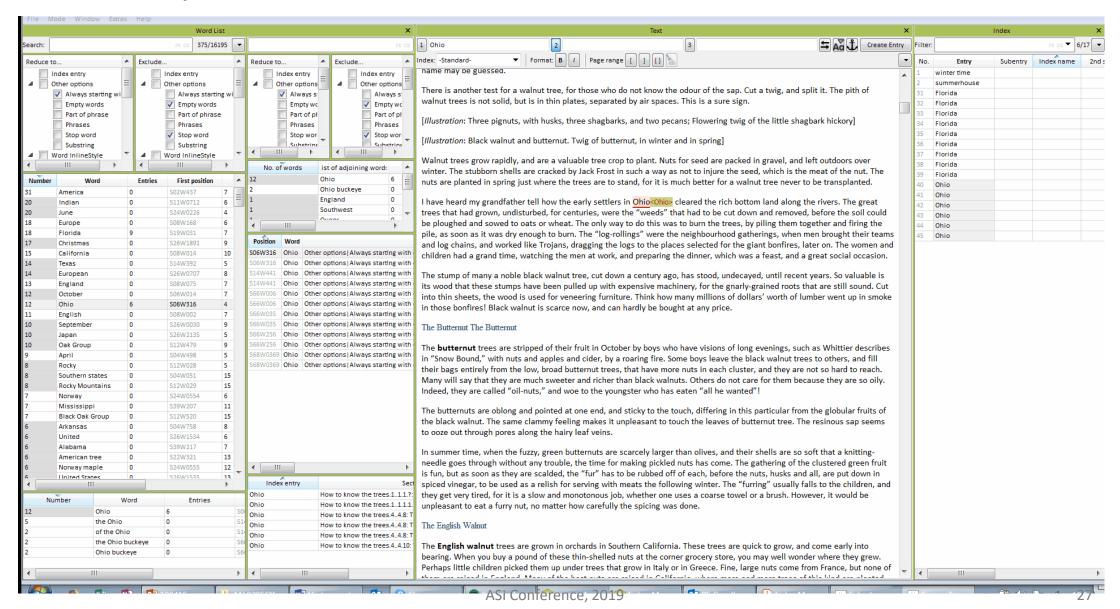


Name and place index Word list – semiautomatically





Name and place index – F7



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

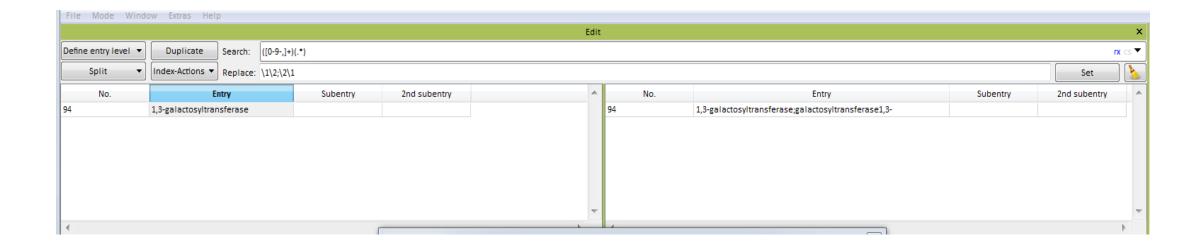


Verifying Cross-references

Color code ensures no blind references

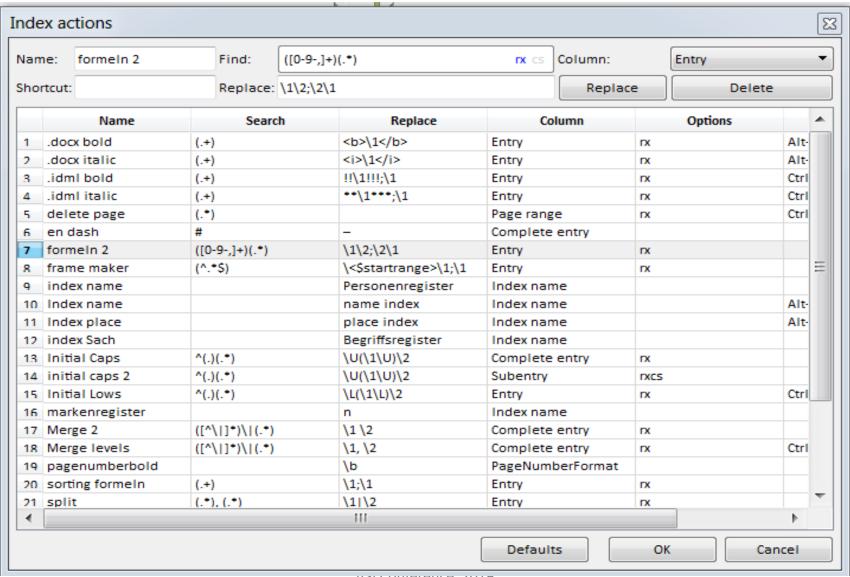


Edit window





Index actions window



32



Index-Actions example

Name	Search	Replace	Column	Options	Shortcut	
.docx bold	(.+)	\1	Entry	rx	Alt+B	Oak -> Oak
.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	Comlete 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







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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=
 "Thesausrus" level="1"/></indexentry>

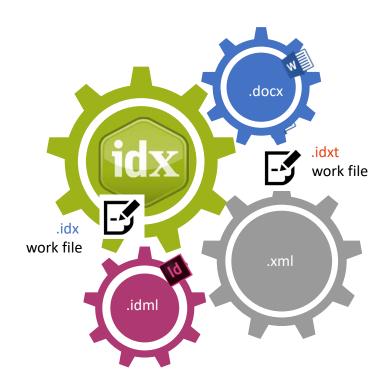




- Index information is not written back immediately
- embedding of entries
 - at any point in time
 - into changed/edited versions of the source files (.idx)
 - into other format versions of the source files (.idxt) Transfer Add-on

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



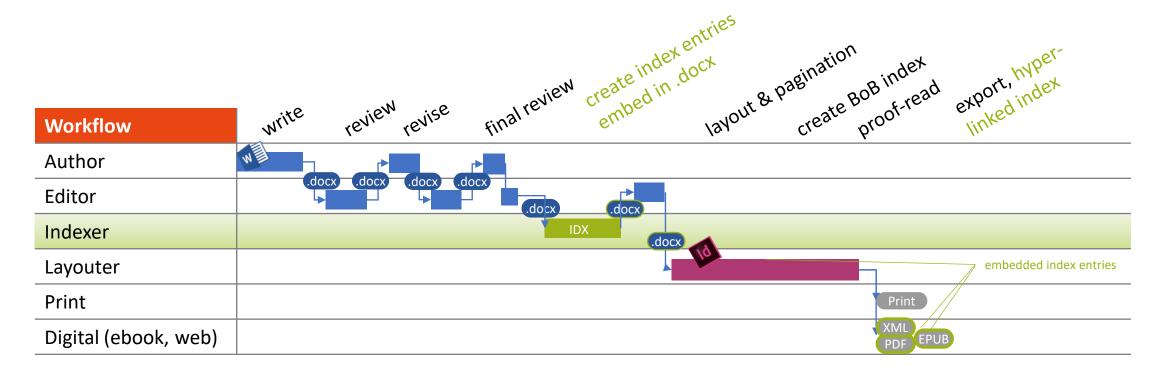
Book production workflow A: Word → Word, same version



Advantage: embedded

Advantage: File exchange only once

■ Problem: critical path, Word → InDesign Transfer



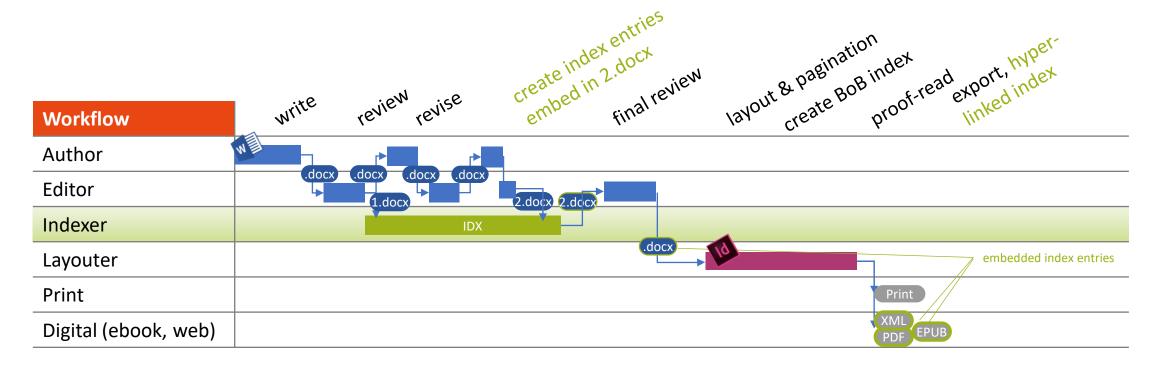
Book production workflow A_1: Word → Word, two document versions



Advantage: embedded

Advantage: no time loss

■ Problem: Word → InDesign Transfer



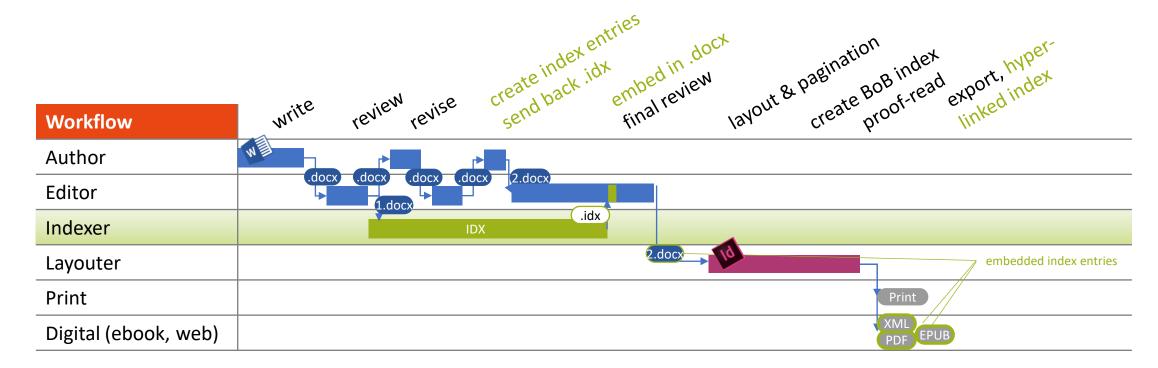
Book production workflow A_2: Word → Word, .idx exchange



Advantage: embedded

Advantage: no time loss, data sovereignity

■ Problem: Word → InDesign Transfer



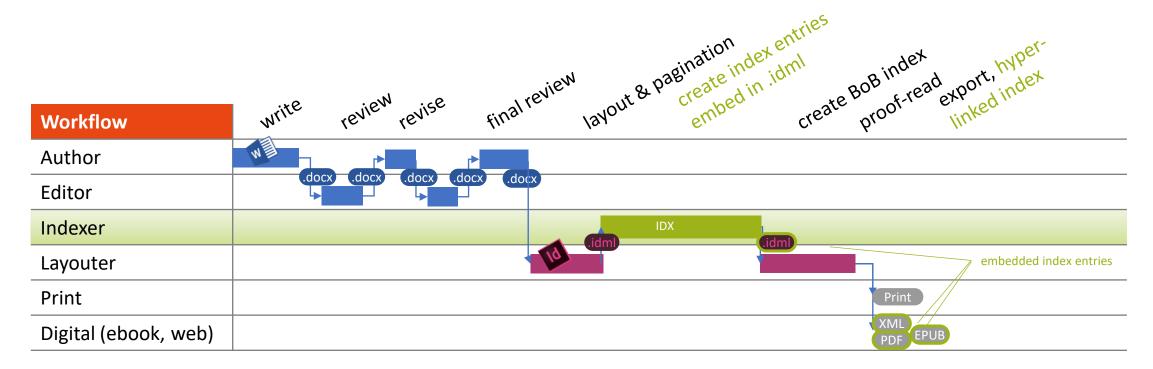
Book production workflow B: InDesign → InDesign, same versions



Advantage: embedded

■ Advantage: no Word → InDesign transfer

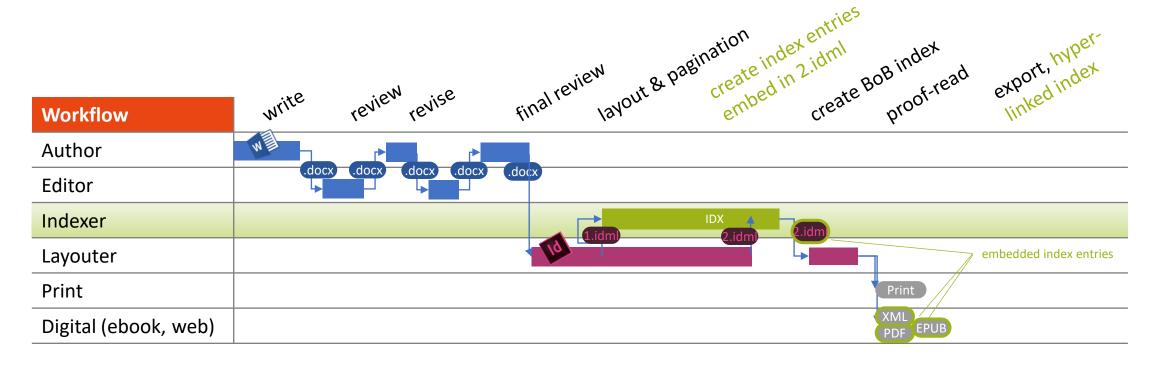
Problem: compatibility problems with different InDesign versions



Book production workflow B 1: InDesign → InDesign, two document versions



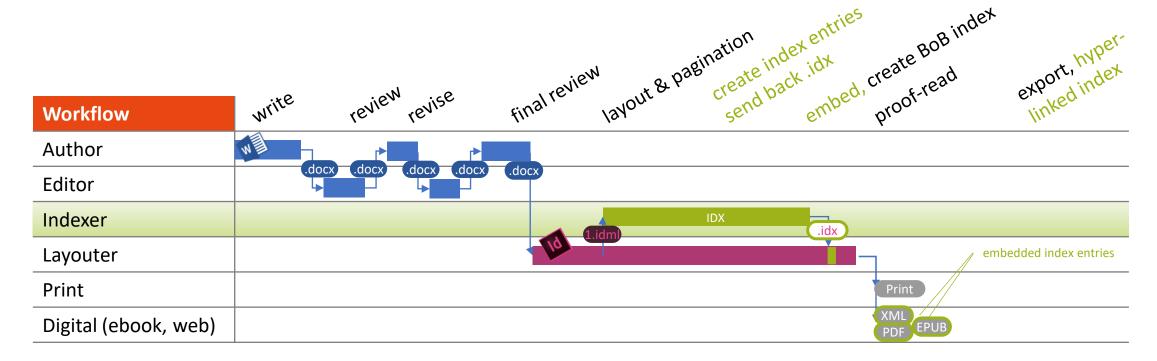
- Advantage: embedded
- Advantage: no Word → InDesign transfer
- Problem: compatibility problems with different InDesign versions, 2x .idml-export



Book production workflow B_2: InDesign → InDesign, idx.exchange



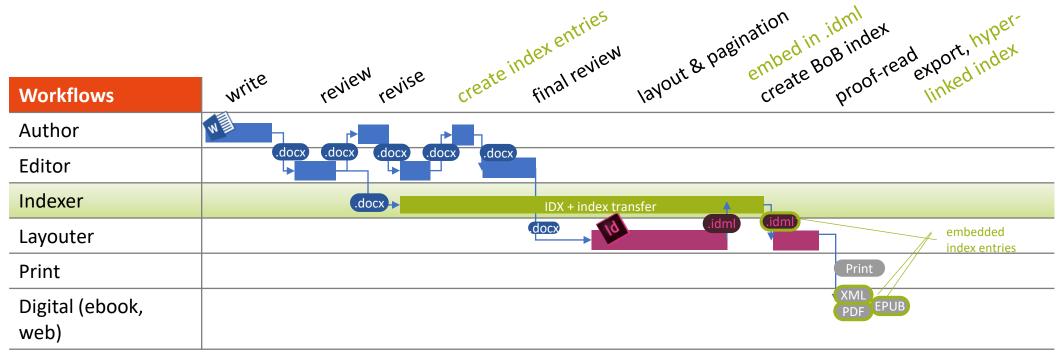
- Advantage: embedded
- Advantage: no Word → InDesign transfer, data sovereignity
- Indexer and Publisher need idx licenses



Book production workflow C: Word → InDesign, Index-transfer



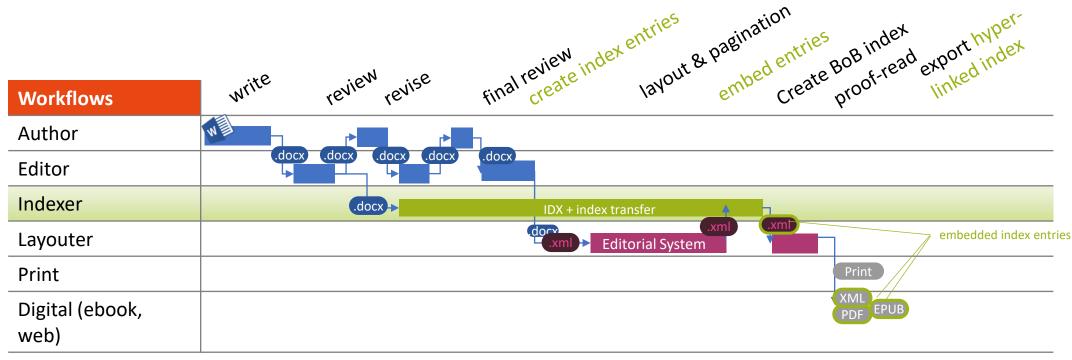
- Advantage: embedded
- Advantage: no time loss, defined customized tag format
- Indexer needs Index-Manager with Add-on



Book production workflow D: XML-First, Word → XML, Index-transfer



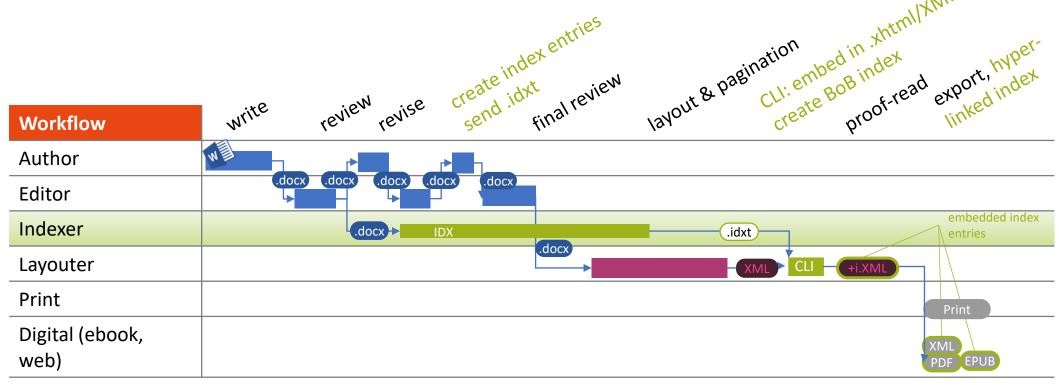
- Advantage: embedded
- Advantage: no time loss, defined customized tag format
- Indexer needs Index-Manager with Add-on



Book production workflow E: Word → XML, .idxt, CLI



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



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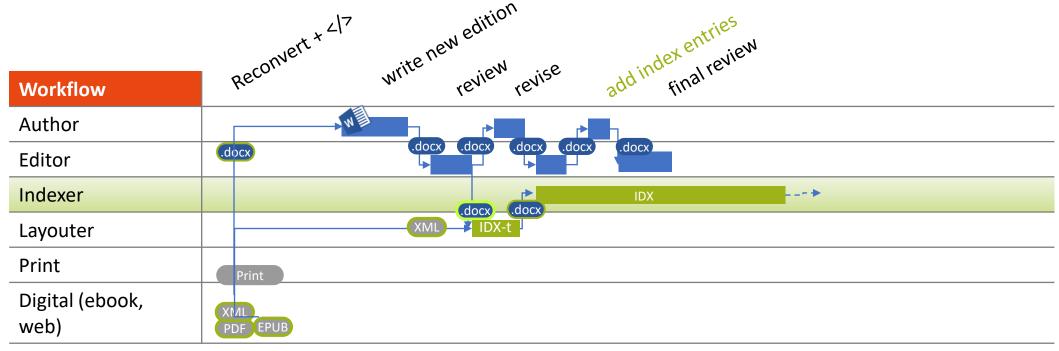
CLI (Command line interface)

- 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 .idxt entries
 - Can transfer .idxt entries across file formats (e.g. embed .idxt 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

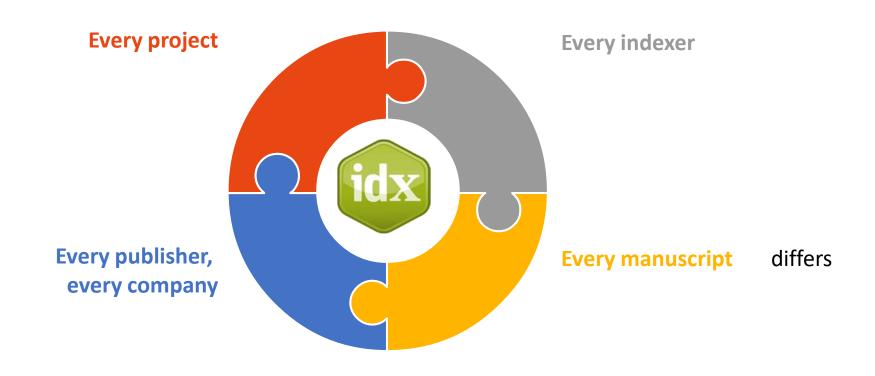


- Advantage: embedded
- Advantage: no time loss, index-backup in case author deletes entries
- Publisher needs Add-on









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

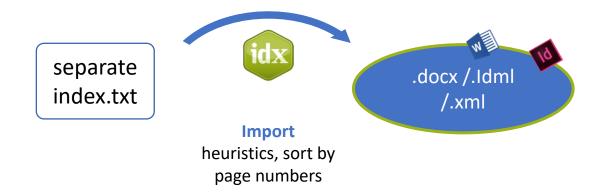




Import of an existing separate index as .txt

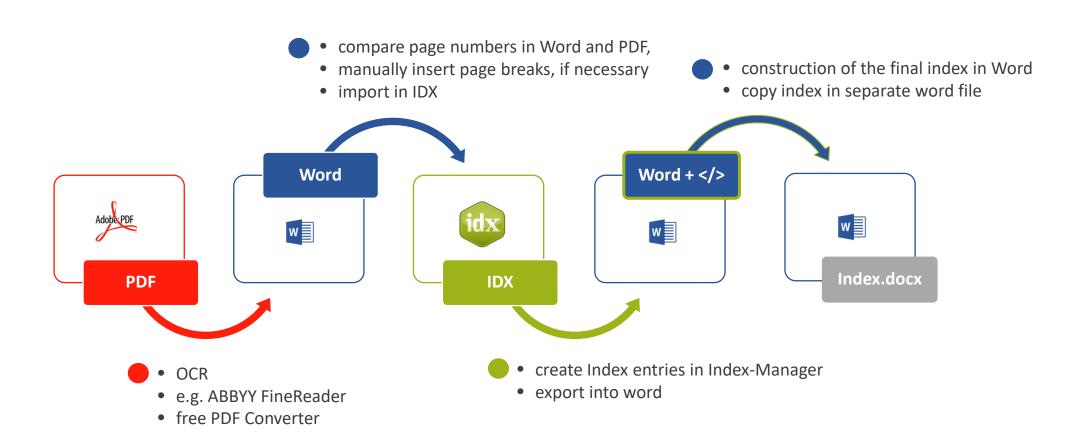
- index import format conversion: yourself with instruction manual, Klarso, IndexConvert...
- manually controlled or automatic embedding

However you want!



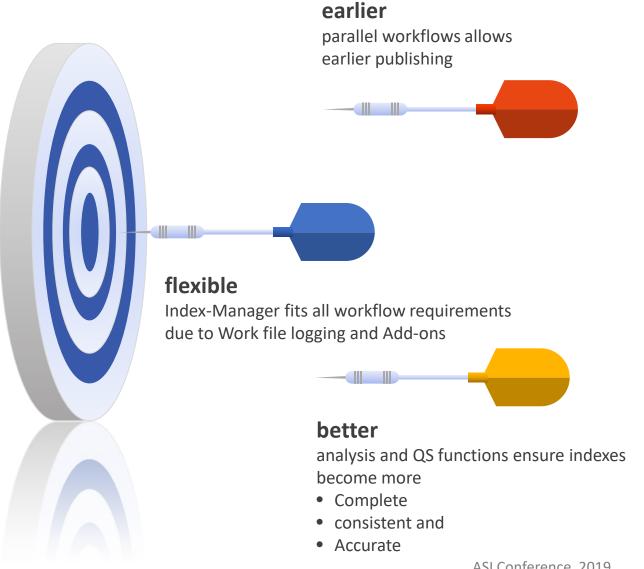


BoB in Index-Manager





How we are innovative – Transformation in Indexing



future proof

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





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

ASI Conference, 2019





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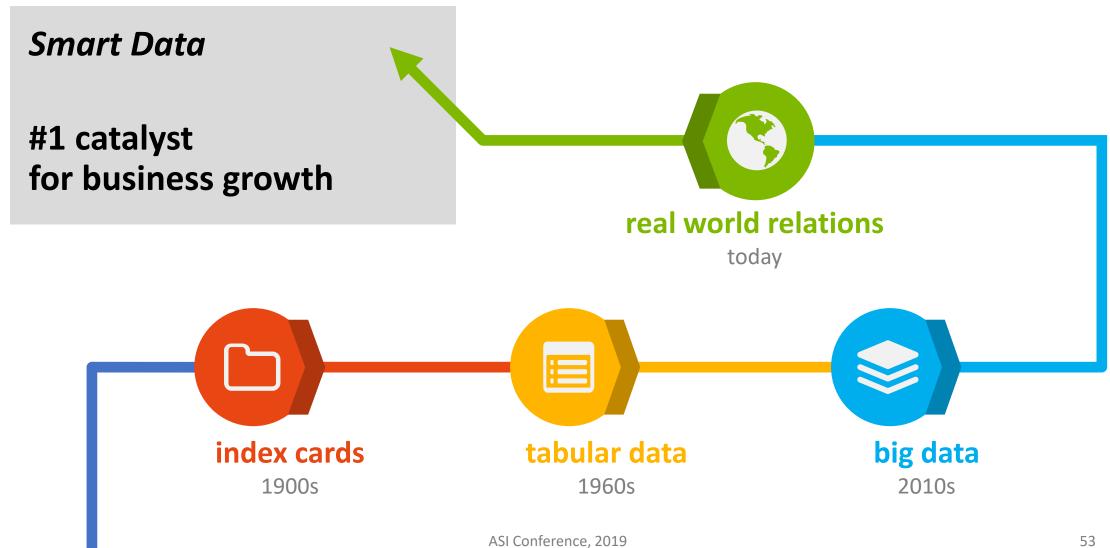
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Shift in the Information Landscape



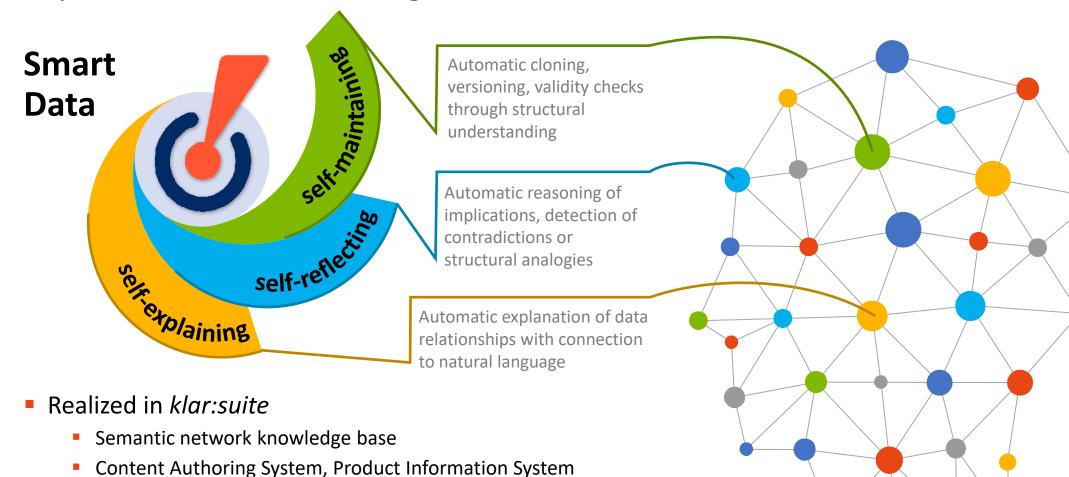


Challenges to Building the Smart Data Future

Rigid work- and True transformation dataflows Customer first Process- and data silos Deadlock to restructure Highly innovative technology Rocky path for innovation

Smart Data to Create Your Top-Down Artificial Intelligence

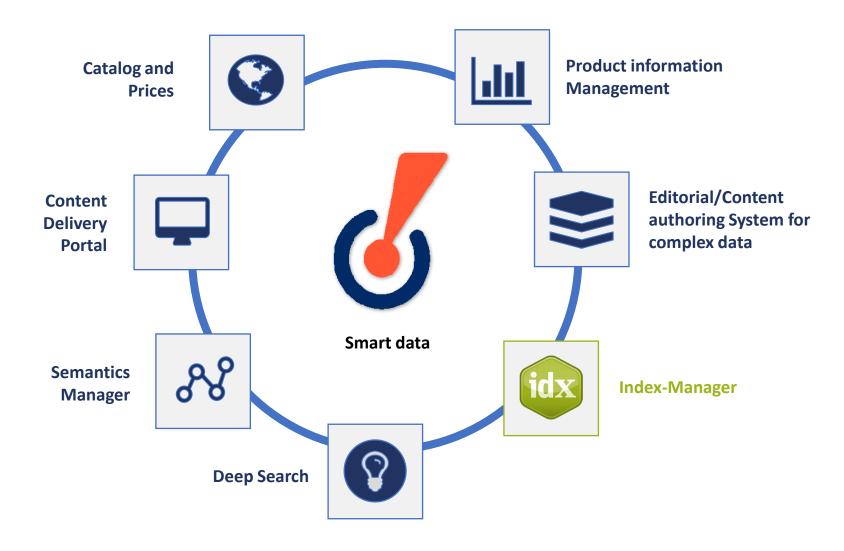




- Establish a top-down Al
 - Fully explainable high level reasoning











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Requirements





Desktop application



Windows 7, 8, 10, MacOS, Linux (on request)



min. 1 GB RAM available



Payment: Subscription model



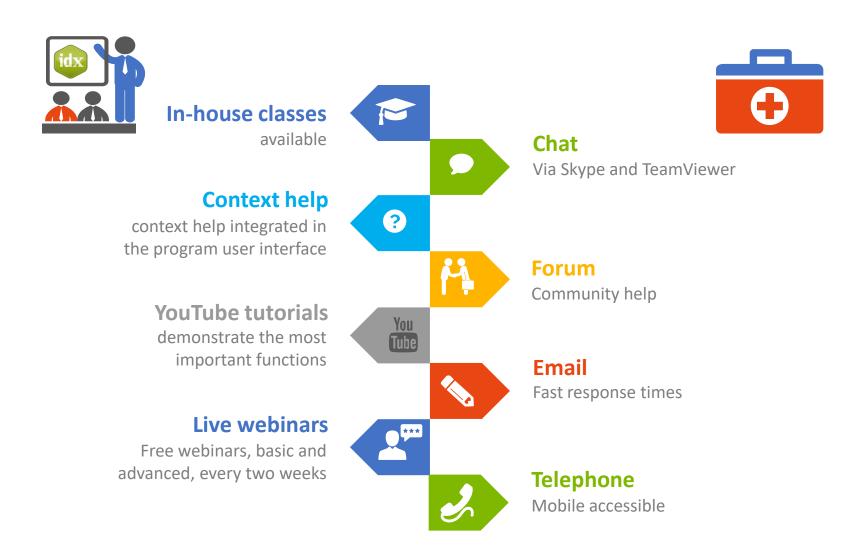
Licenses for InDesign are not necessary for working in IDX

Embedding of the entries is done by IDX

Open source documents for quality control only
construction of the final index by publisher







www.index-manager.net



klars

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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)
e 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

insert new functions: index actions cross reference editor	
and the second of the first test of	
 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 version 	s, step by step
 Add-ons: Index-Import and Index-Transfer 	
 Indexing integration in book production workf 	flows
* O&A	

our 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.	
SAVE YOUR SEAT	

Klarso GmbH Berlin E-Mail: info@klarso.com E-Mail: info@index-manager.net Web: klarso.com



Dr. Katharina Munk 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 (ldx) since its inception. The first version of Index Manager was presented at the Frankfurt Book Fair in 2012.

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1 year, per seat, Premium support

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Publisher forwards project licenses to freelance indexer Price by request Add-ons inclusive

minimum purchasing quantity: 10

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Add-ons

Index-Transfer: \$ 113,00 Index-Import: \$ 113,00

1 year, requires valid Index-Manager license,

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Discount





Thank you for listening

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