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

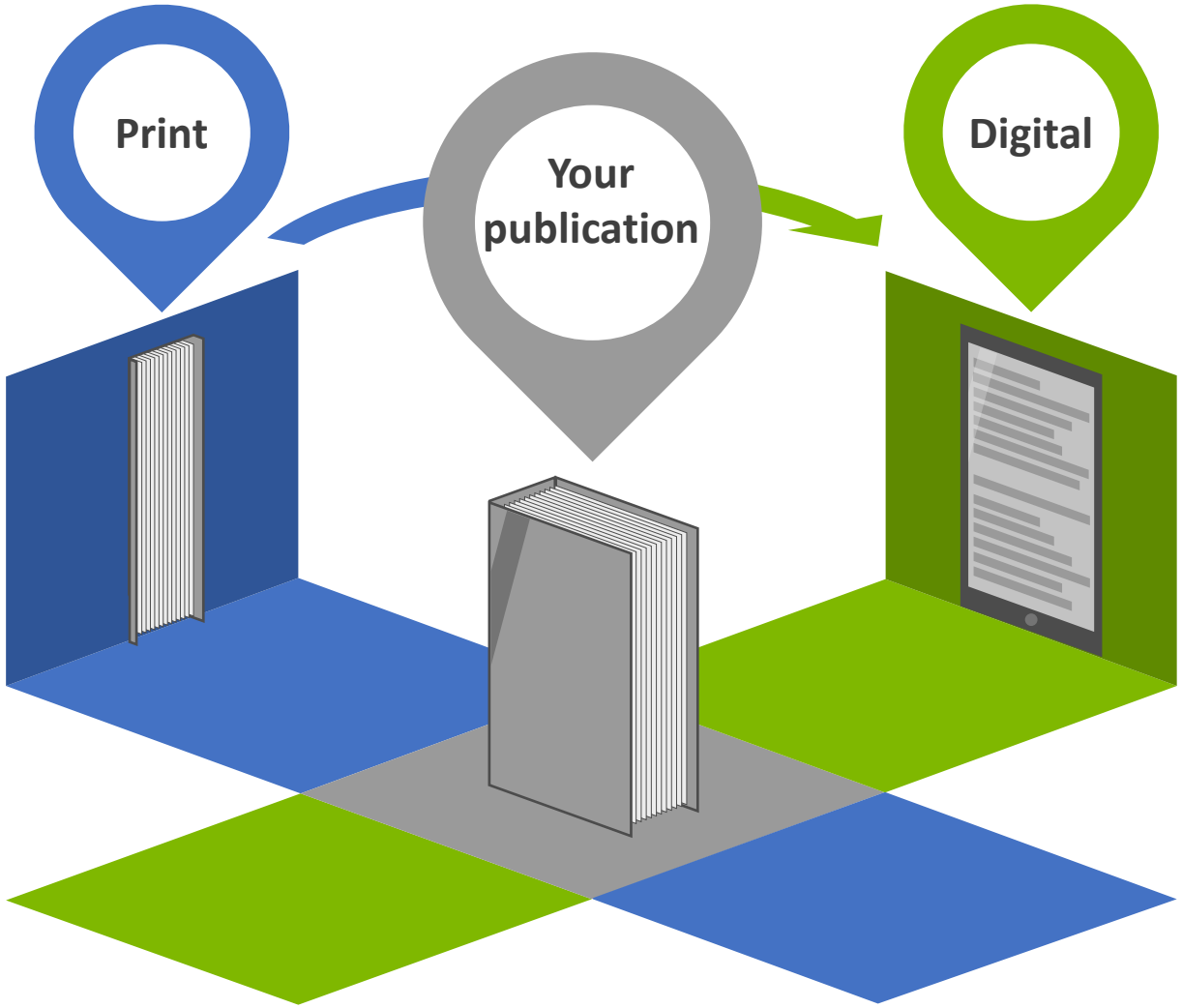
When is embedded indexing done?
Manuscript, e.g. in Word, Layout e.g. in InDesign…

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

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

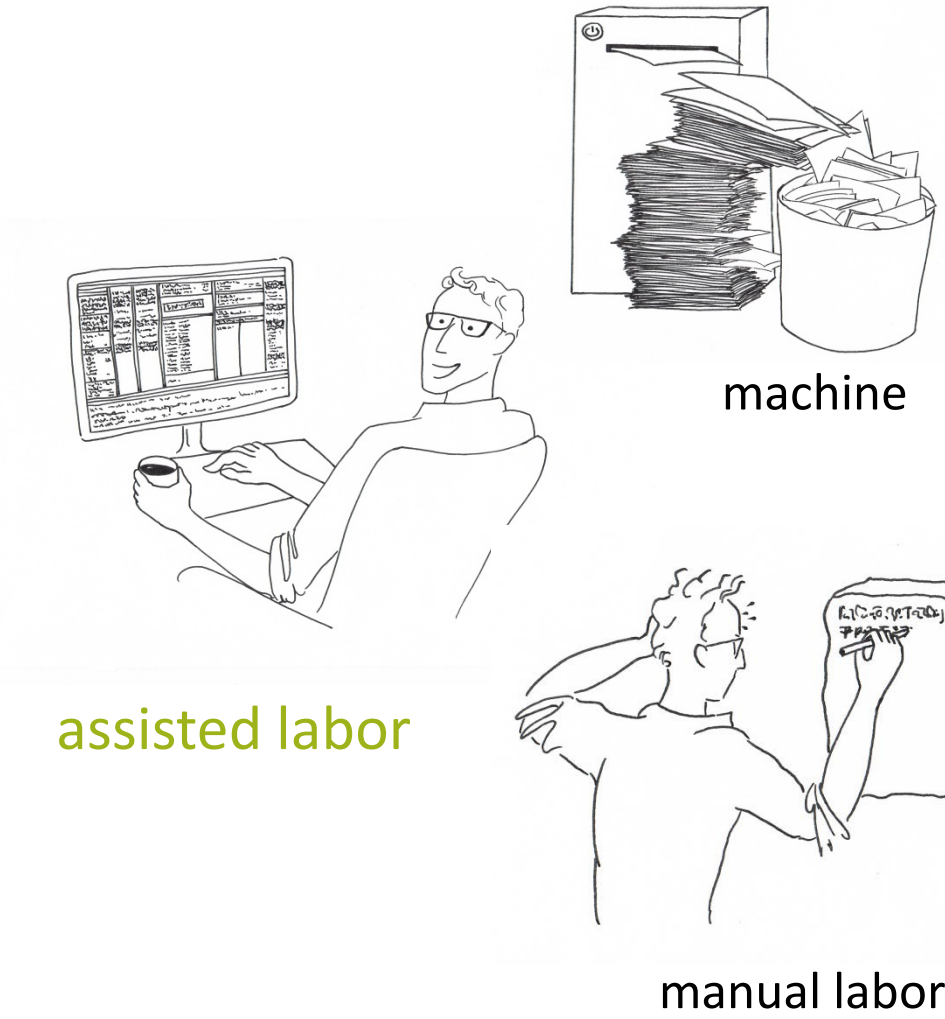
Why is indexing important in the digital world with exponential information growth?

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



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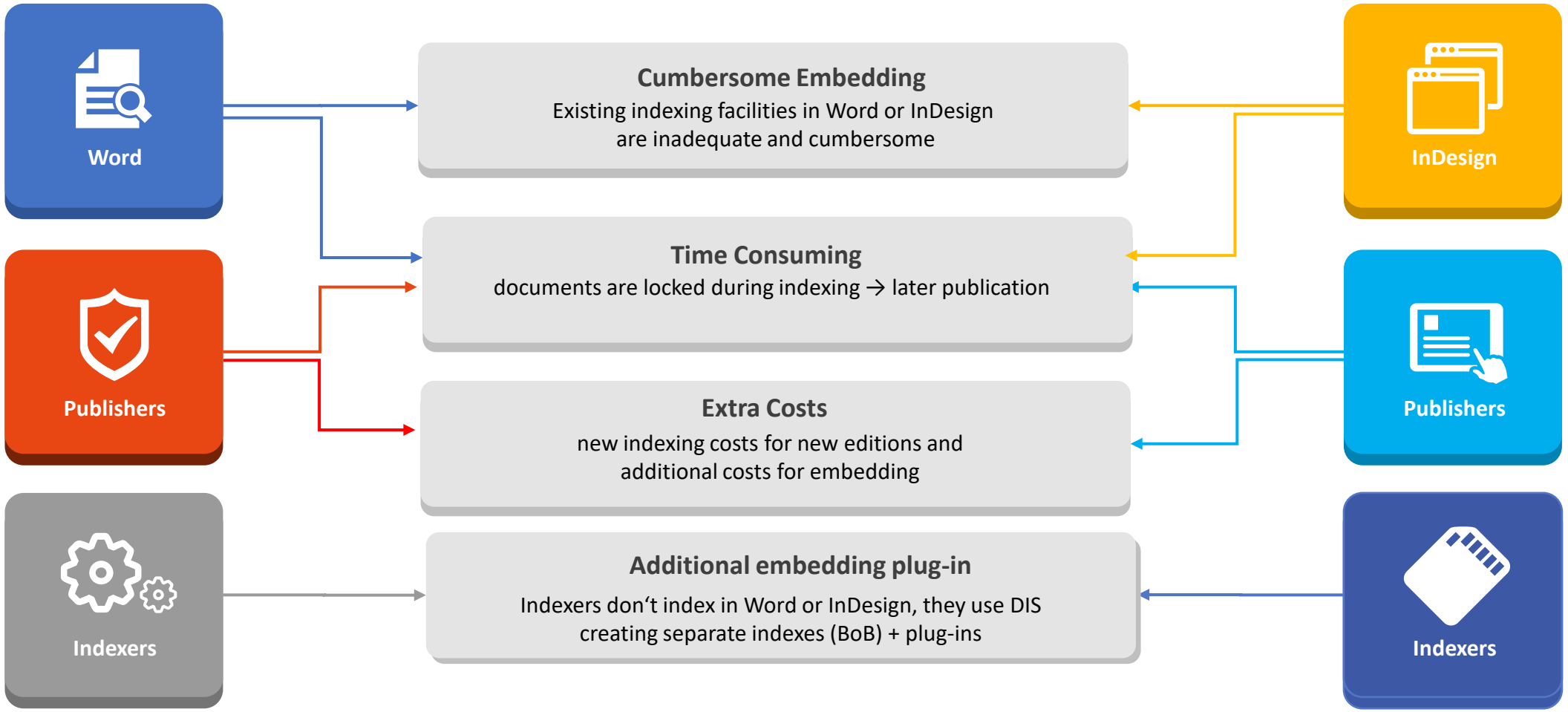
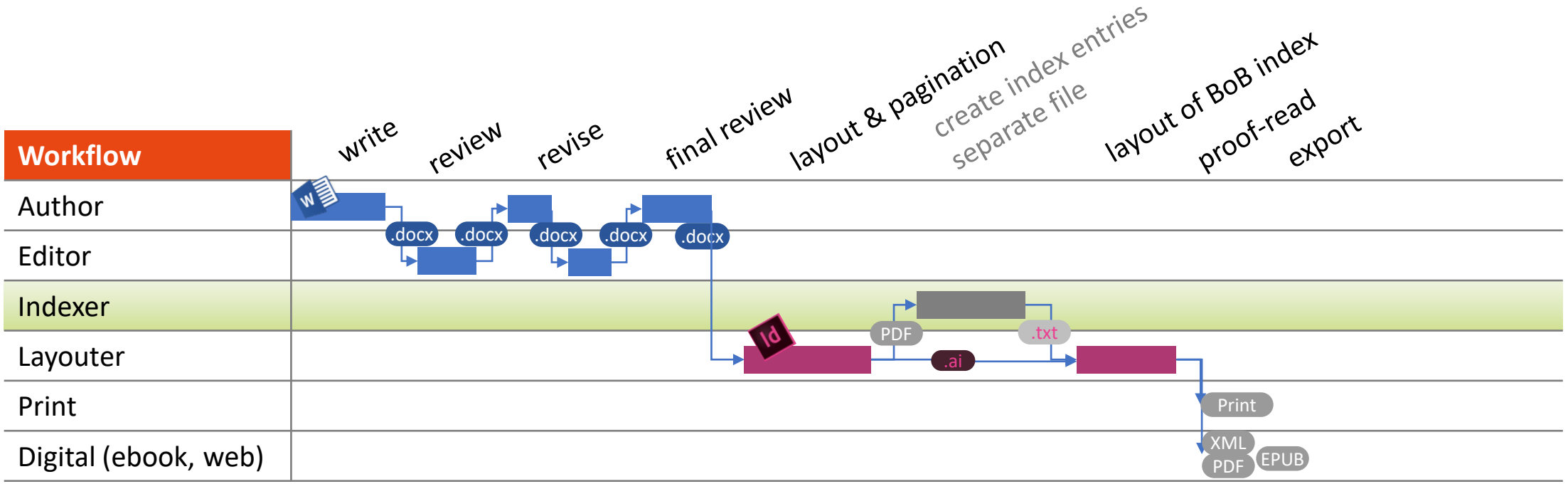
The reality for embedding indexing now



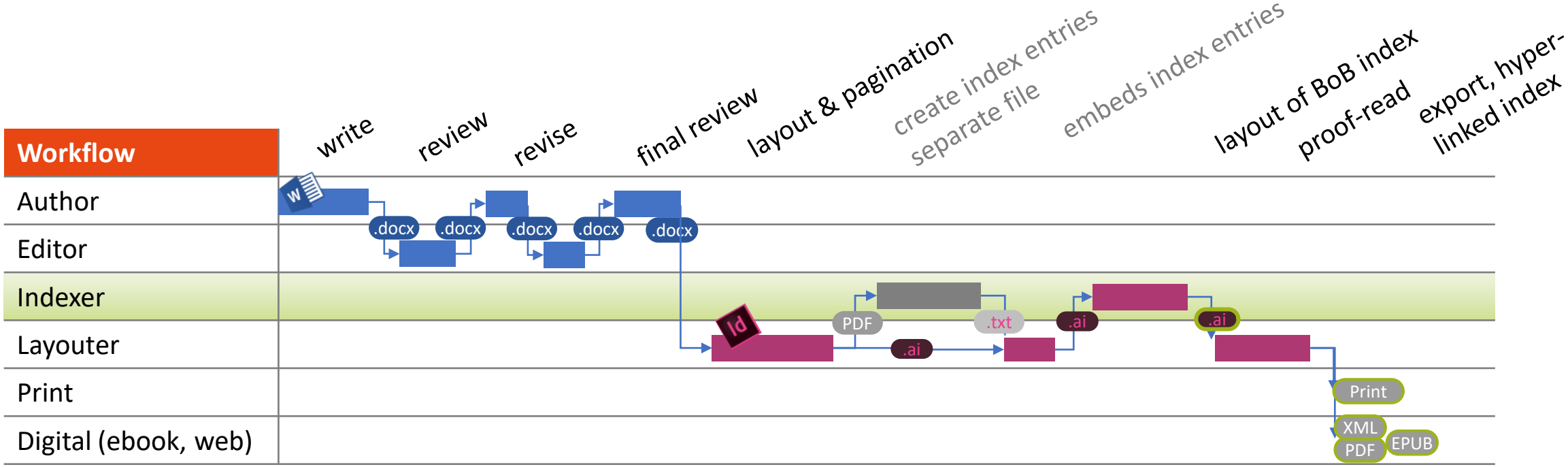
Book production workflow
Version A: reality now – BoB index and critical path

- 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



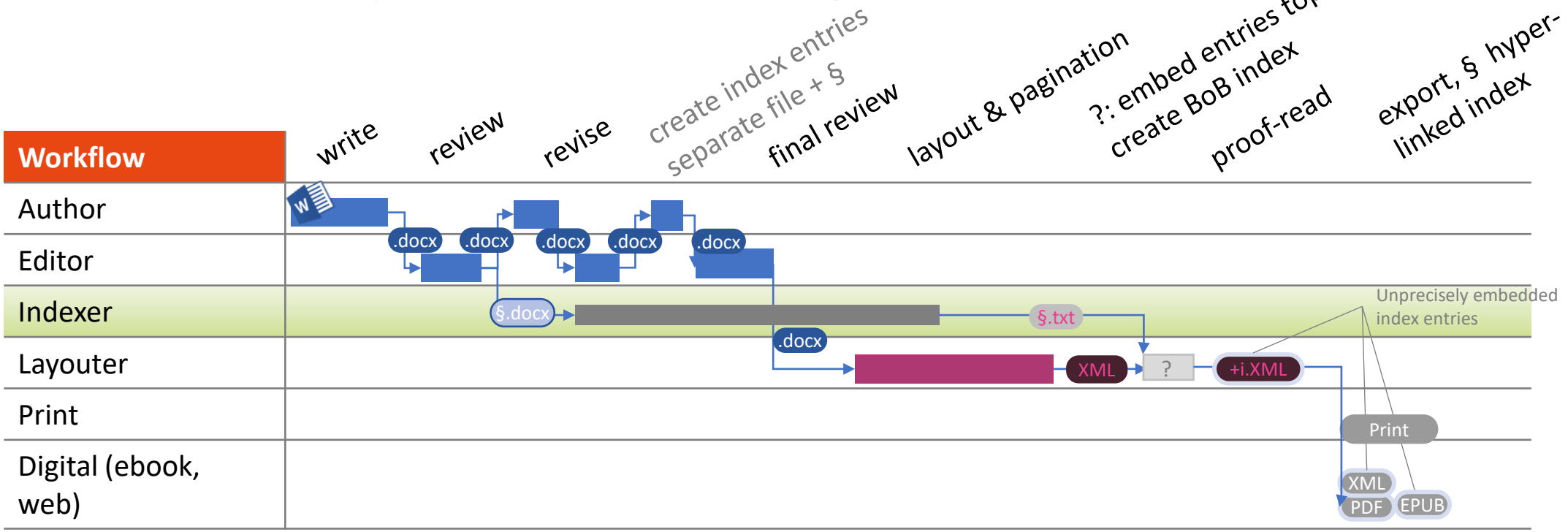
Book production workflow
Version B: reality now – BoB index, embedding and critical path

- 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
- Problem: additionally create § version, embedding tool (?)



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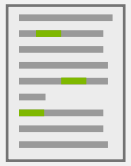
Index-Manager
Flexible workflow, faster indexing, better index, fit for digital

	Publisher	Indexer	Publisher		
		Term extraction, Completeness, Consistency, Index QC			
Standard	layout & final page numbers 	PDF locate & type — search by eye — manually edit — generate & check	separate index.txt 	layout the index & attach to book 	e-book, No linked index 
Index-Manager	any format, no page numbers needed 	idx Word InDesign DocBook XML point & click — auto check — batch support — live preview	embedded entry tags 	layout & paginate, auto-create index in WORD / InDesign 	e-book, hyperlinked index 

Index-Manager – powerful indexing and embedding functions

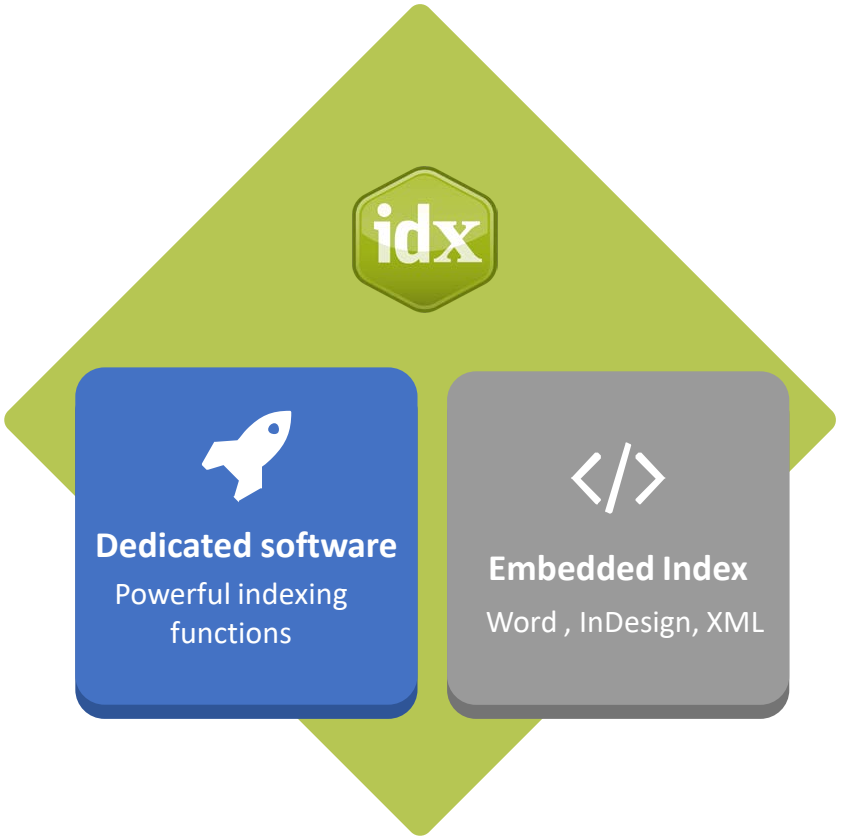
Index-Manager

- 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

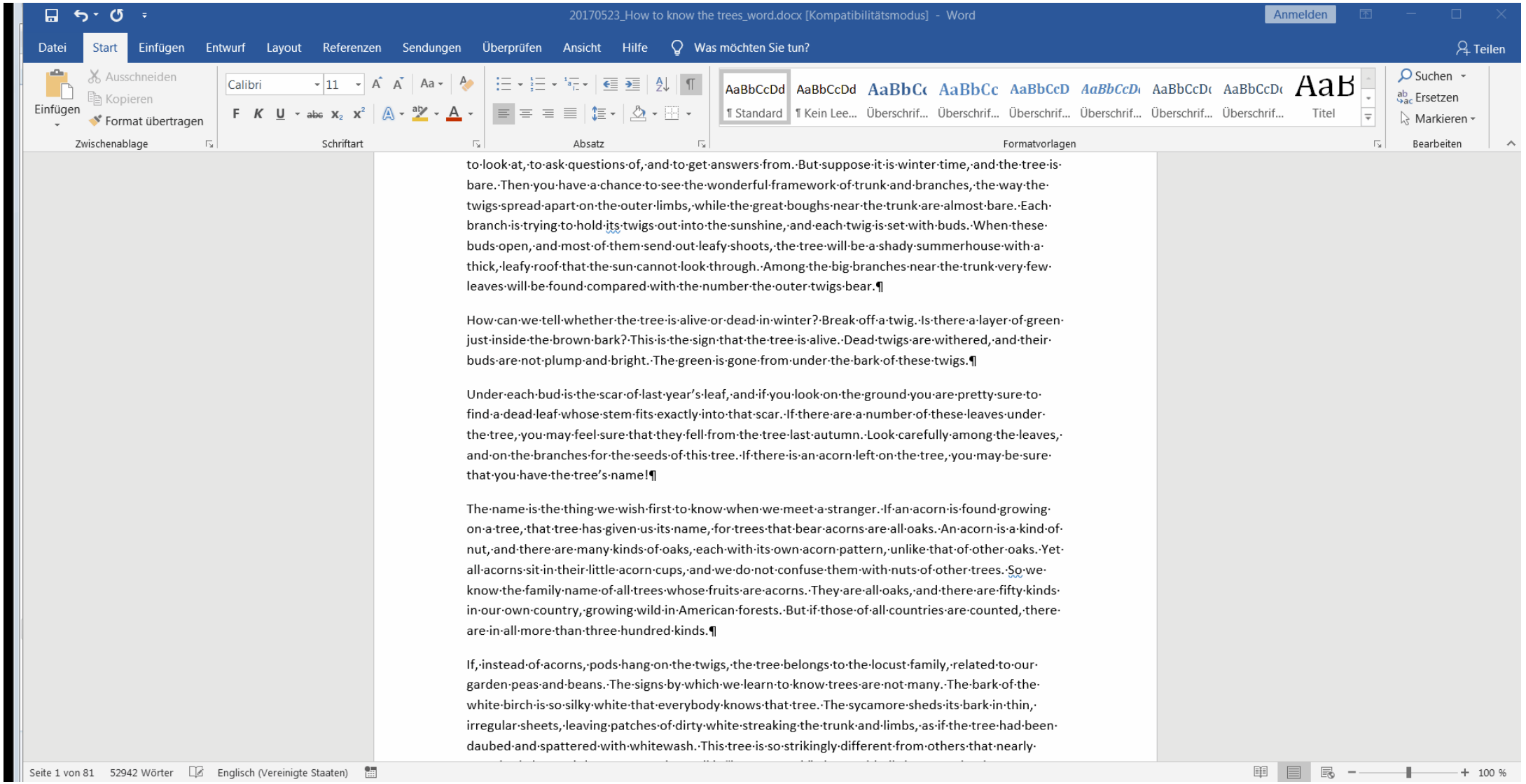
and

it also inserts the index entries into the document files



You don‘t have to decide!

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

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

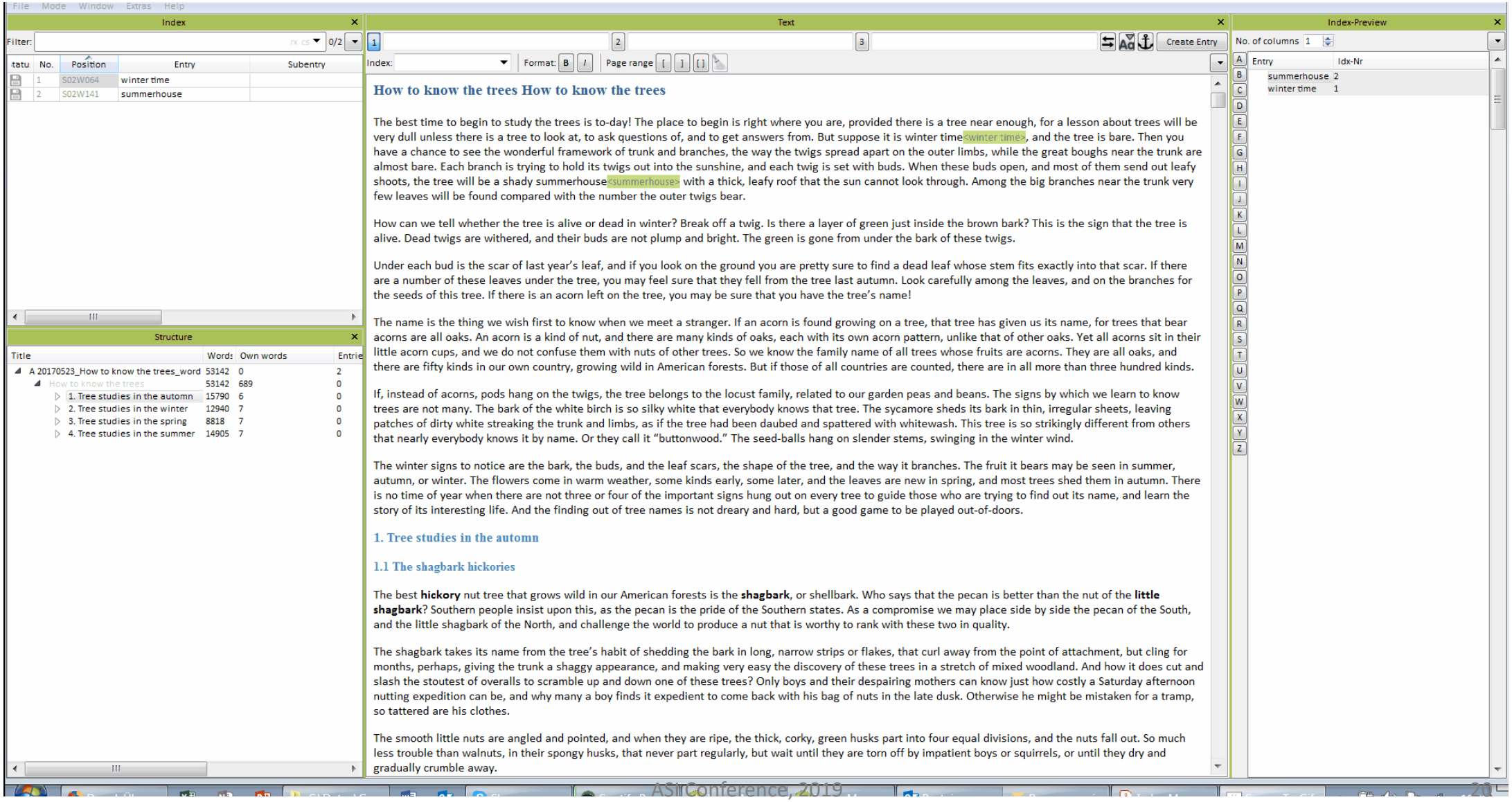
Search via word list
Select the subheading, check every occurrence of a term

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

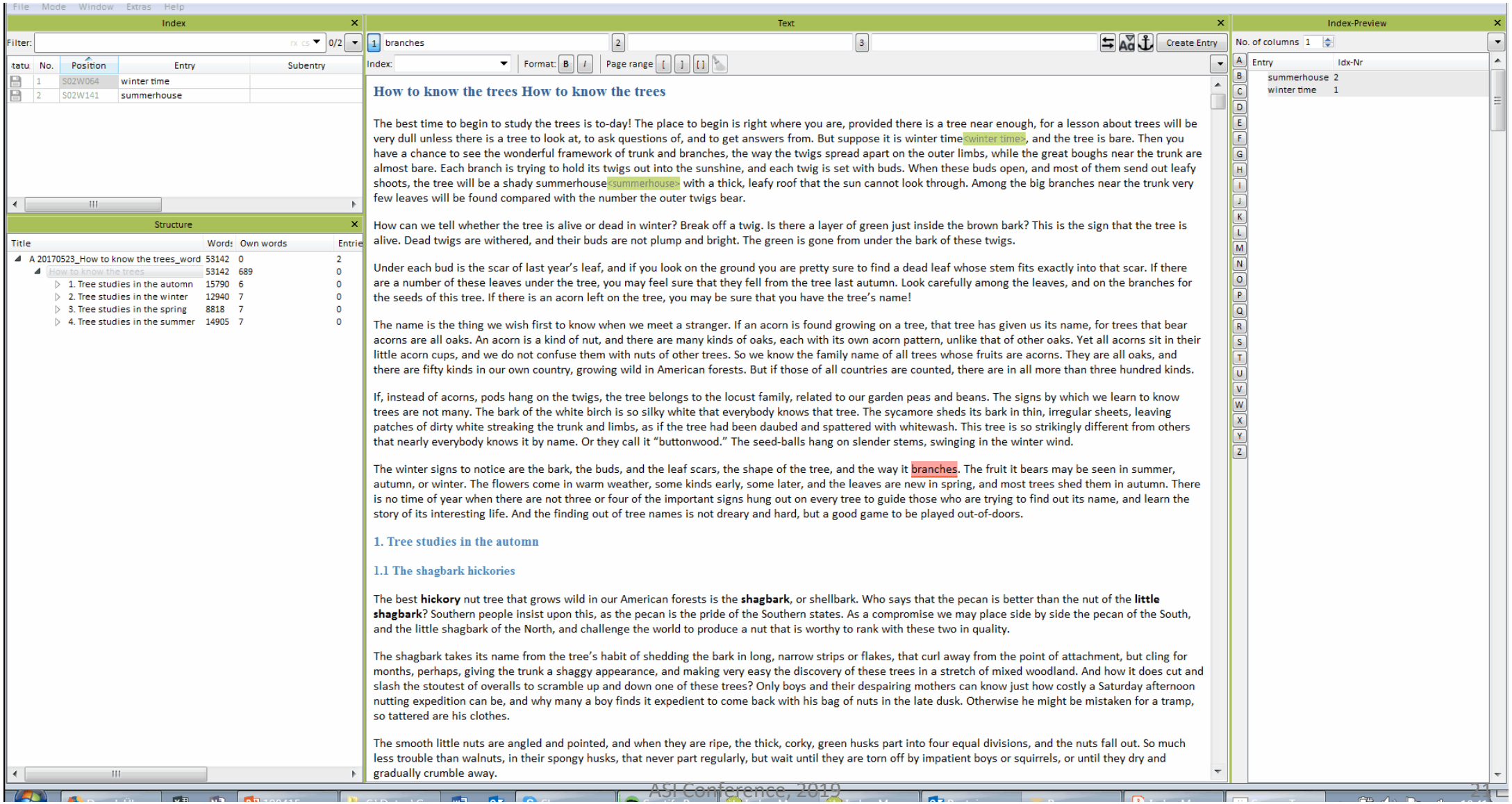
Formats
Filter options, along tags of different kinds directly in the text, even for different indexes

External resources
"Load word list file", concordance list, terminology

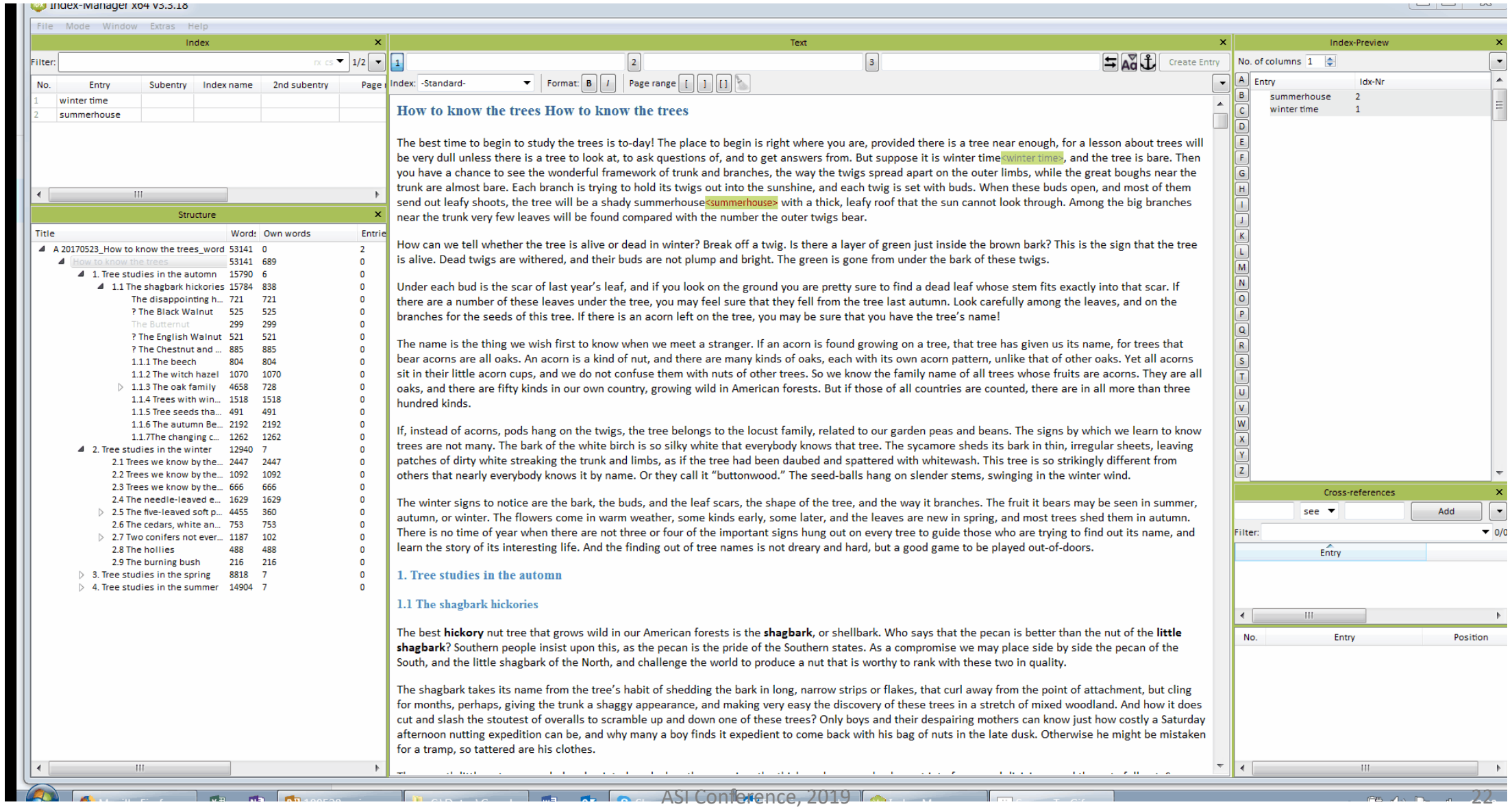
Term extraction – Search in text



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

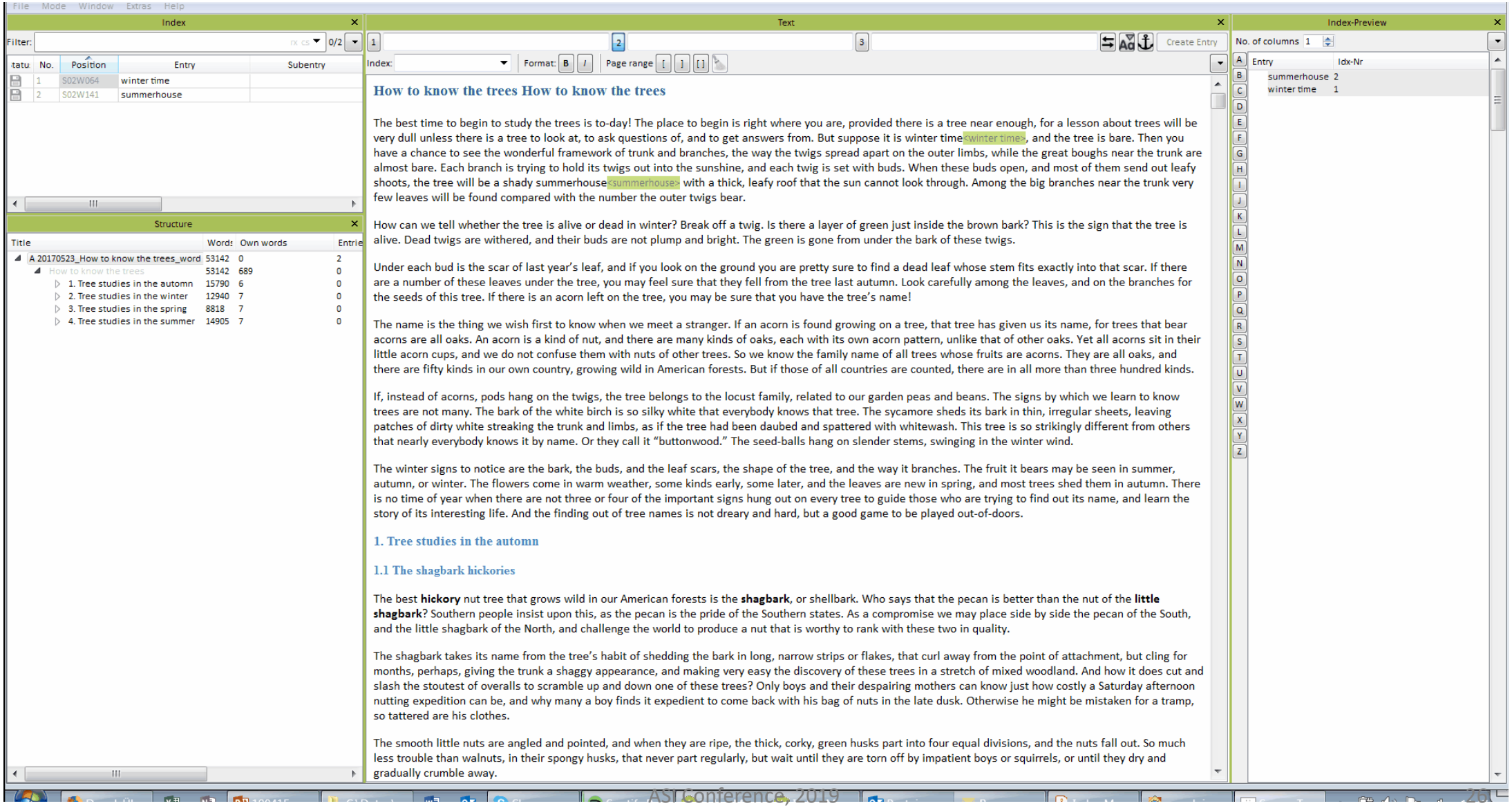
Document-focused, Analysis and heuristics
Filter and sorting options, along number of occurrences, frequent words

Structure-focused, Word:entry ratio
Identify under or over indexed sections

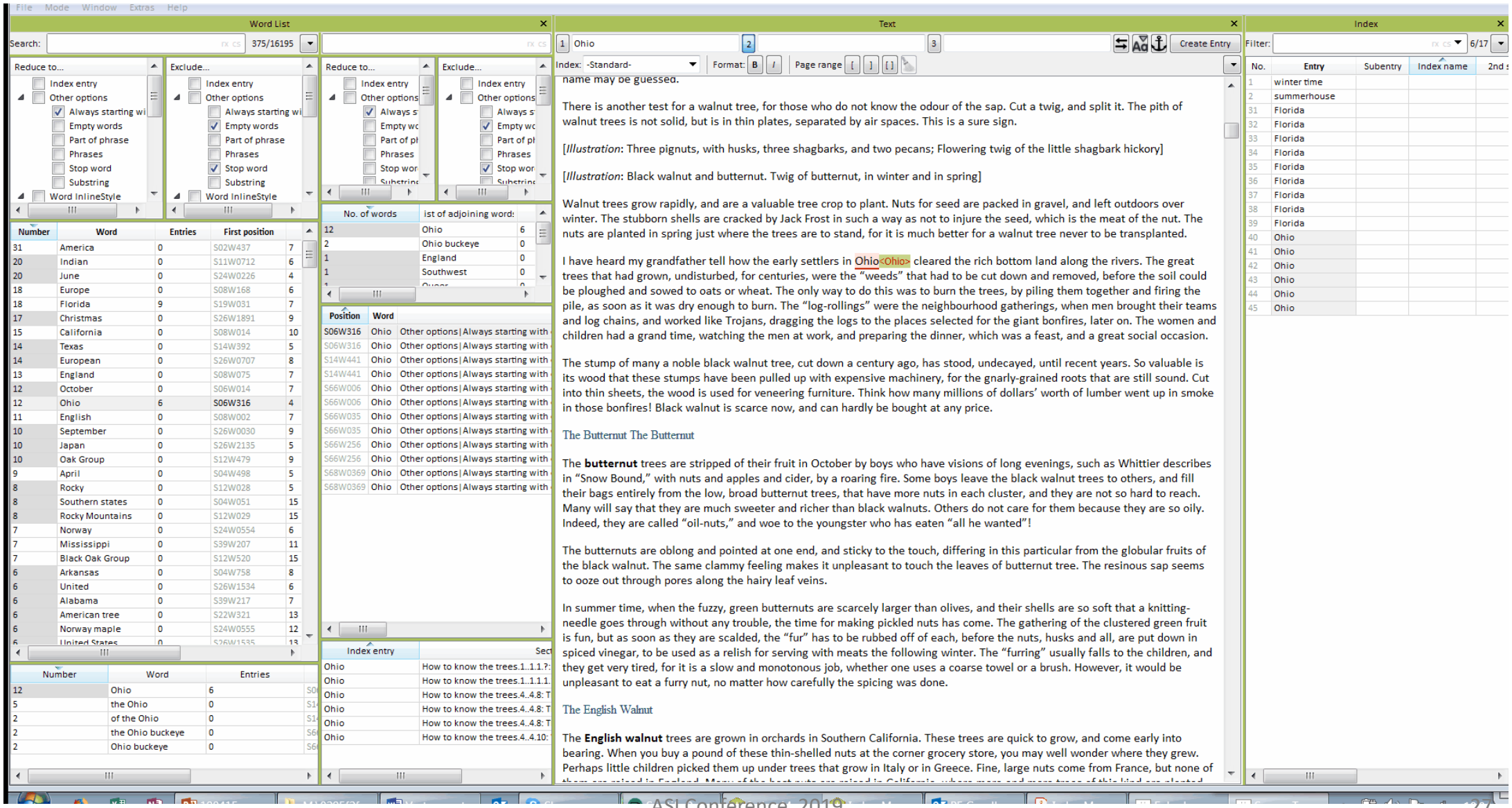
Streamline production
Every occurrence for name or place indexes with one click!


idx

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


idx

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…

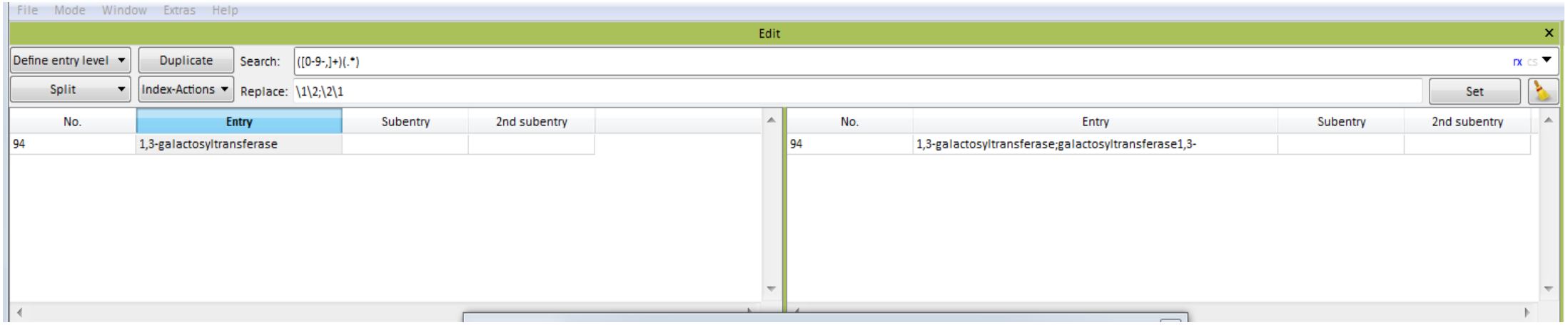
Editing, editing
use all functions for hundreds of entries with one click, standardize spelling, lower/upper case…

Live Index preview
correct directly within the index preview only once!

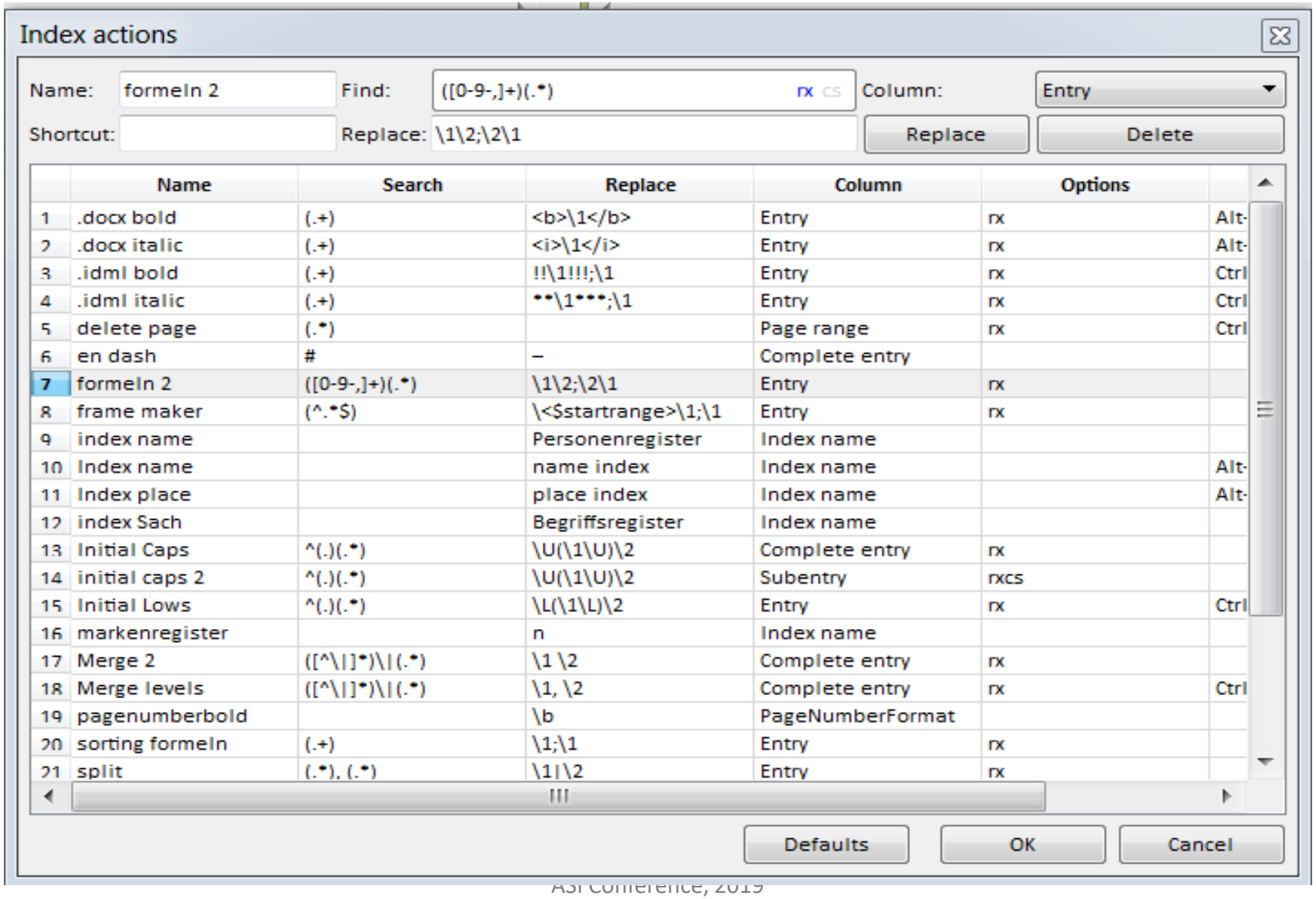
Find & replace
by patterns and regular expressions Perl syntax

Verifying Cross-references
Color code ensures no blind references

Edit window


File Mode Window Extras Help
Edit
Define entry level
Duplicate
Search:
([0-9-,]+)(.*)
rx cs
Split
Index-Actions
Replace:
\1\2;\2\1
Set
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 example

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

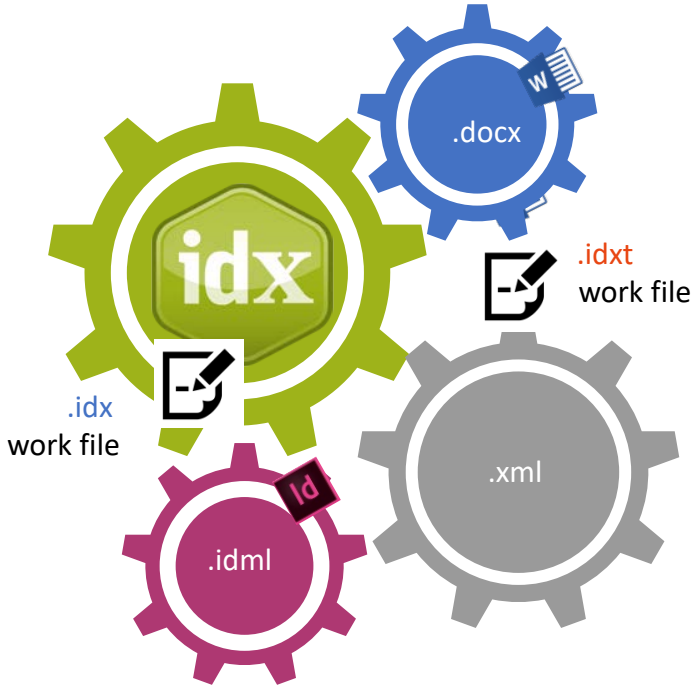
- combined with a thesaurus
  <indexentry><entry1> surgical methods of Diagnostics</entry1><concept cidref="CO3456" type= "Thesausrus" level="1"/></indexentry>

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 (.idxt) – Transfer Add-on

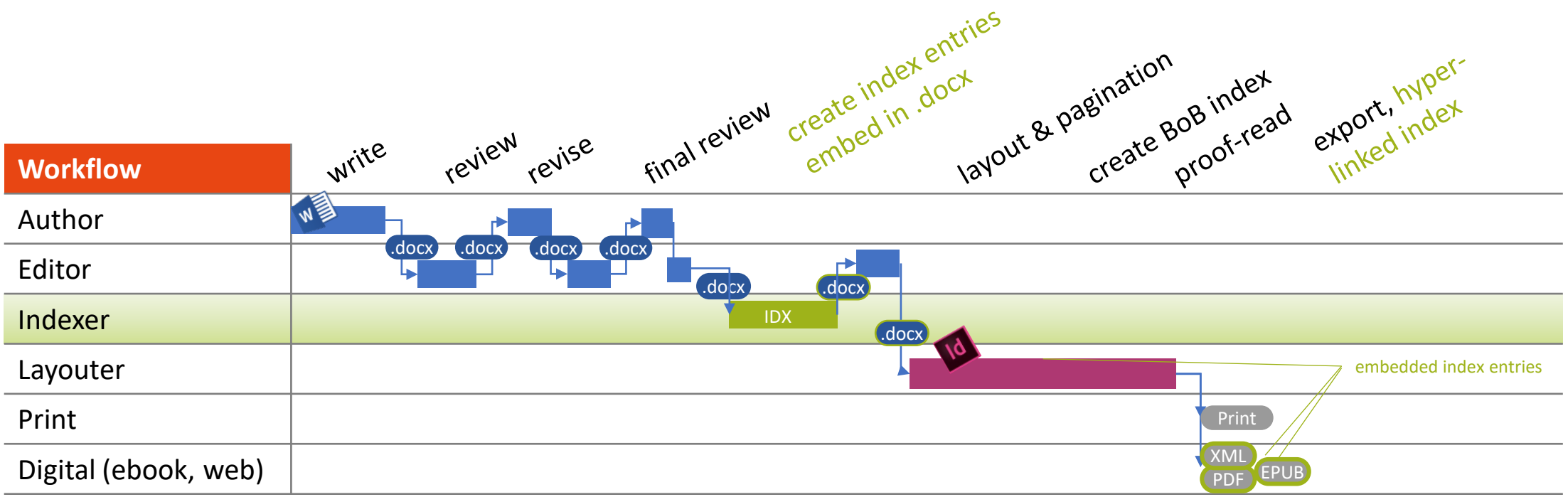
Advantages:

- 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



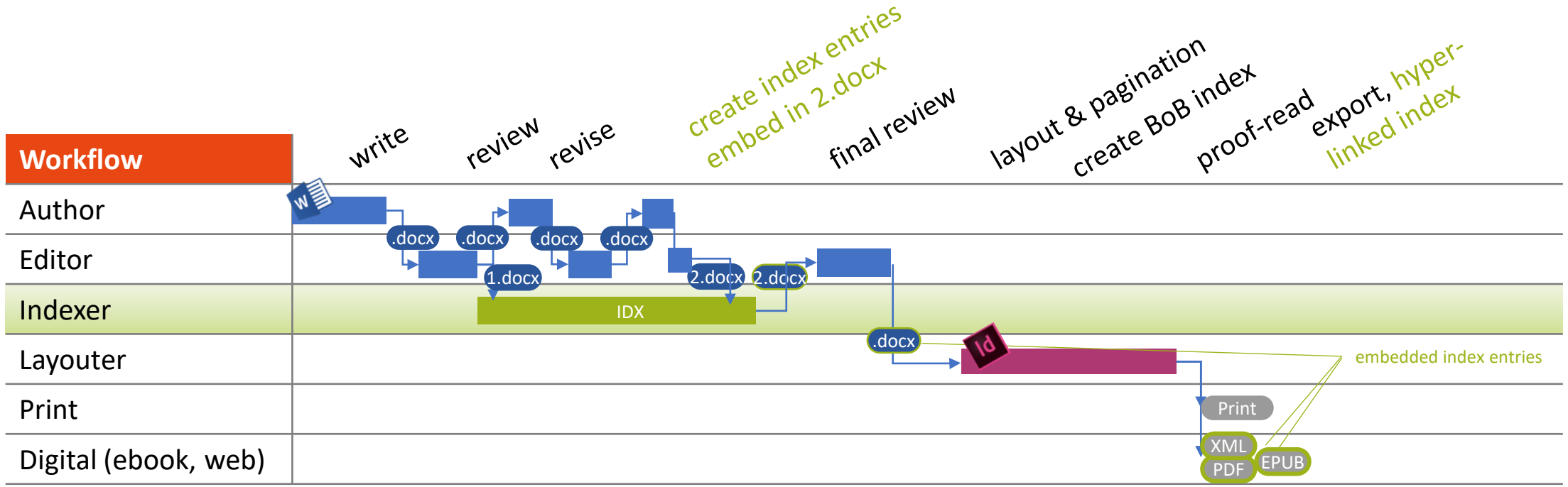
Book production workflow
A: Word → Word, same version

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



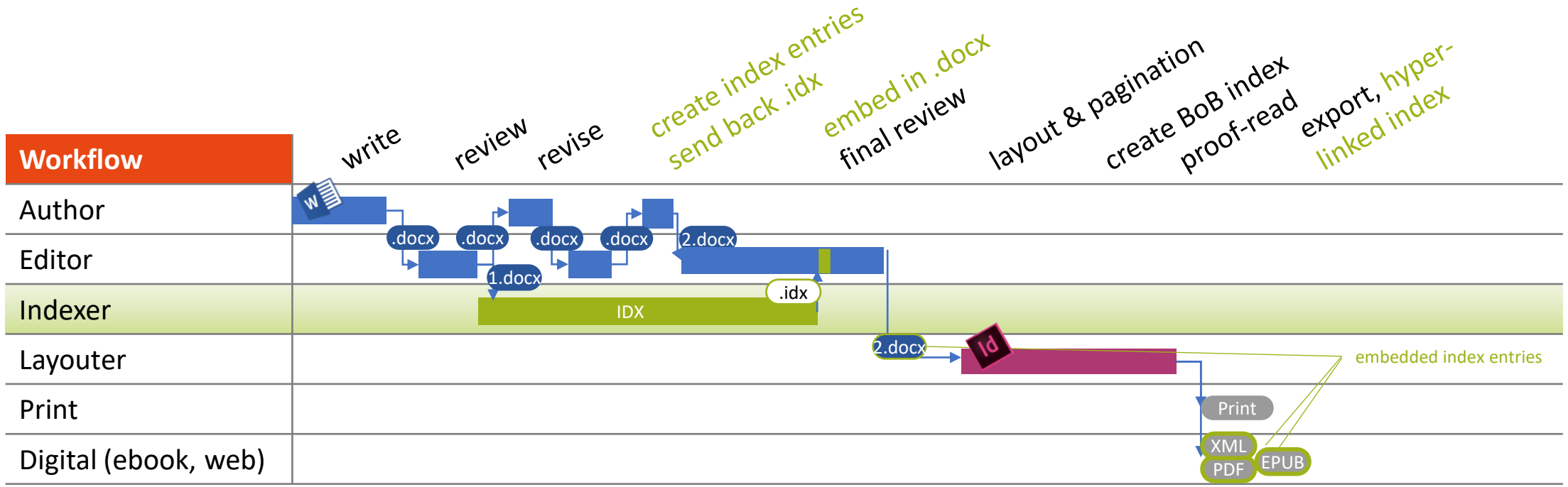
Book production workflow
A_1: Word → Word, two document versions

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



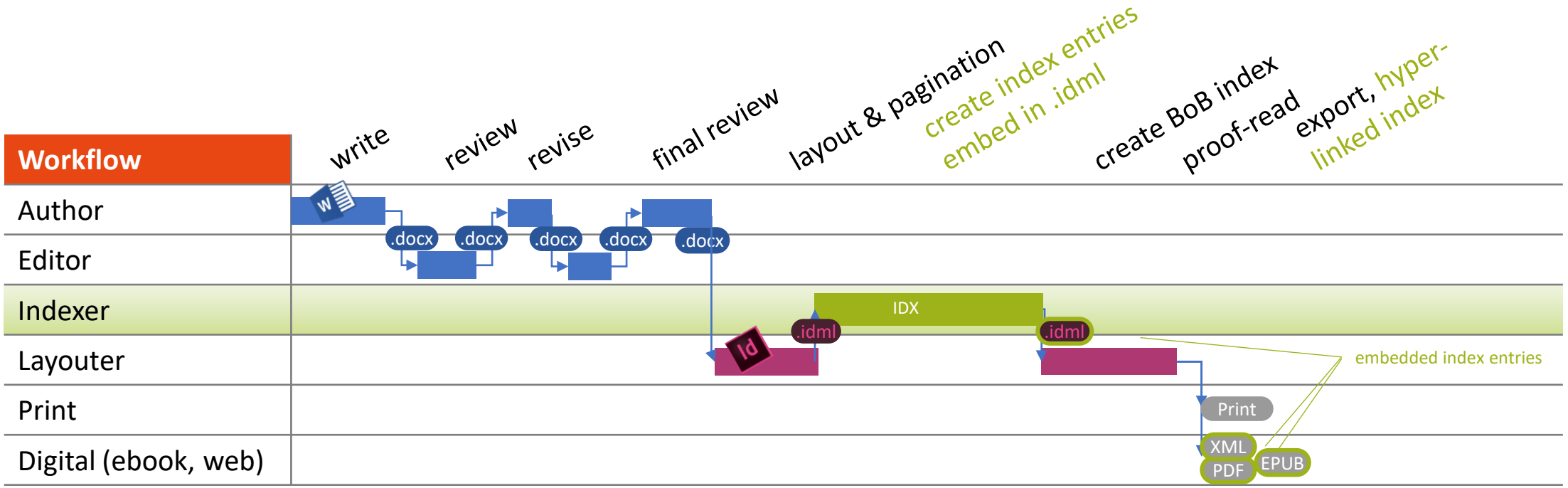
Book production workflow
A_2: Word → Word, .idx exchange

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



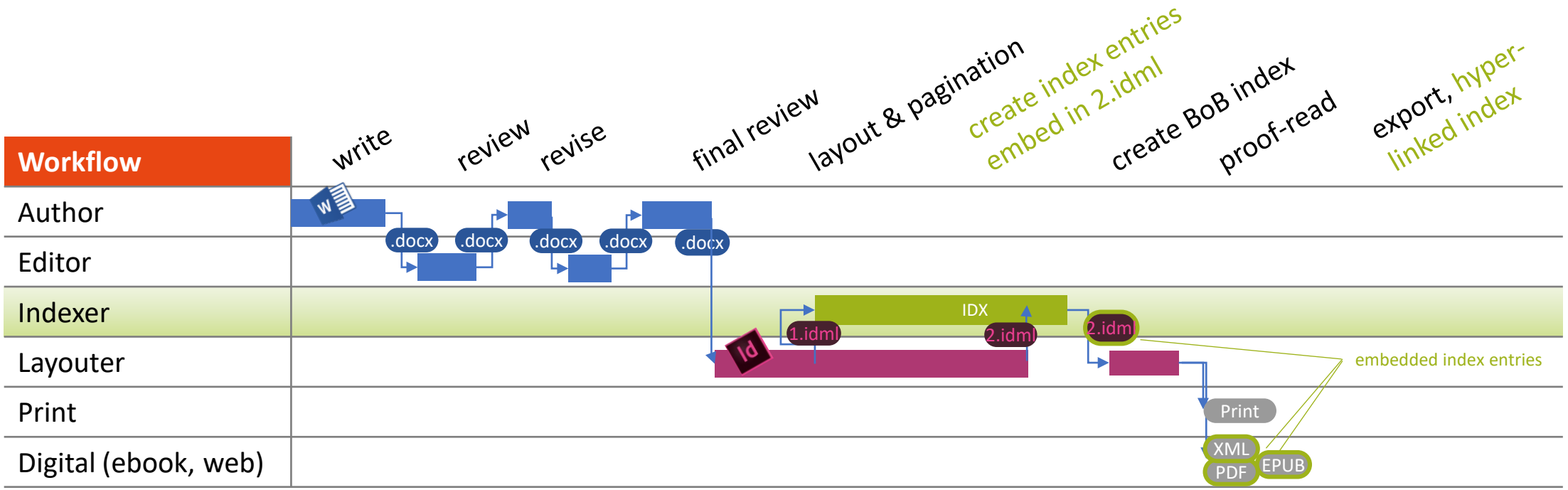
Book production workflow
B: InDesign → InDesign, same versions

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



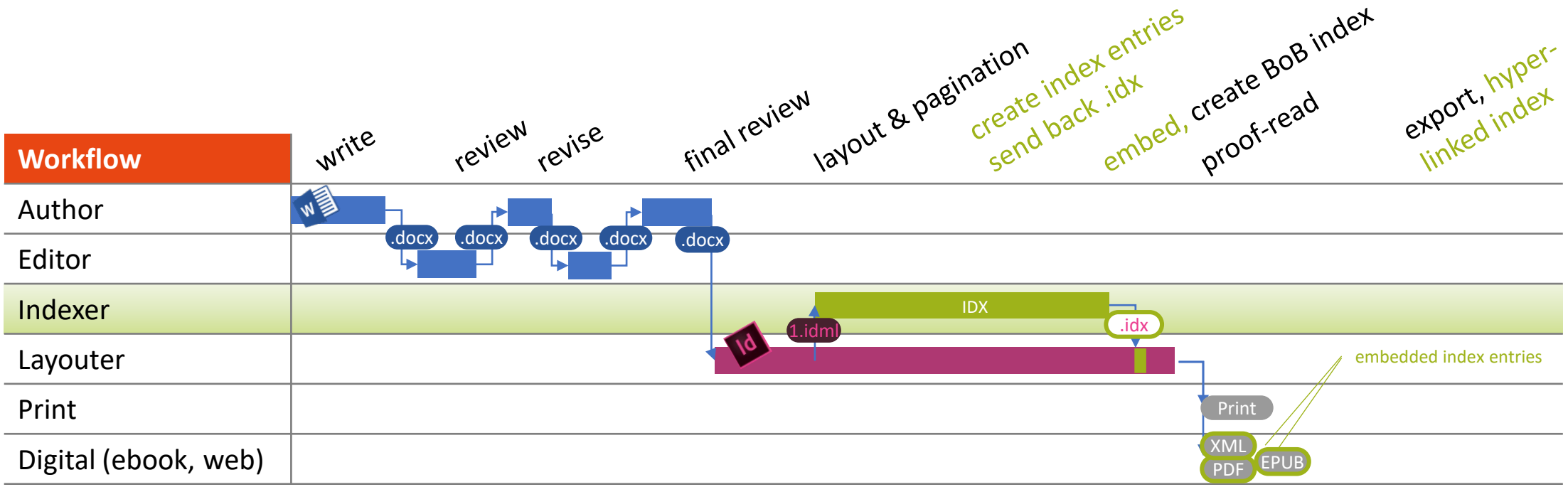
Book production workflow
B_1: InDesign → InDesign, two document versions

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



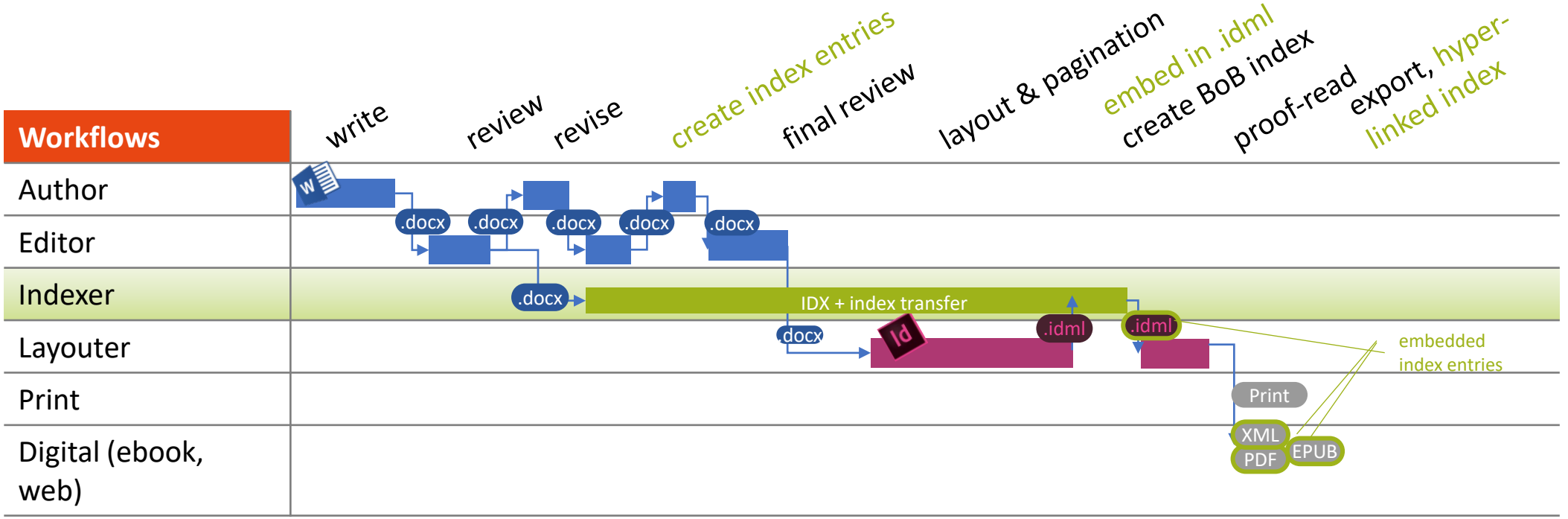
Book production workflow
B_2: InDesign → InDesign, idx.exchange

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



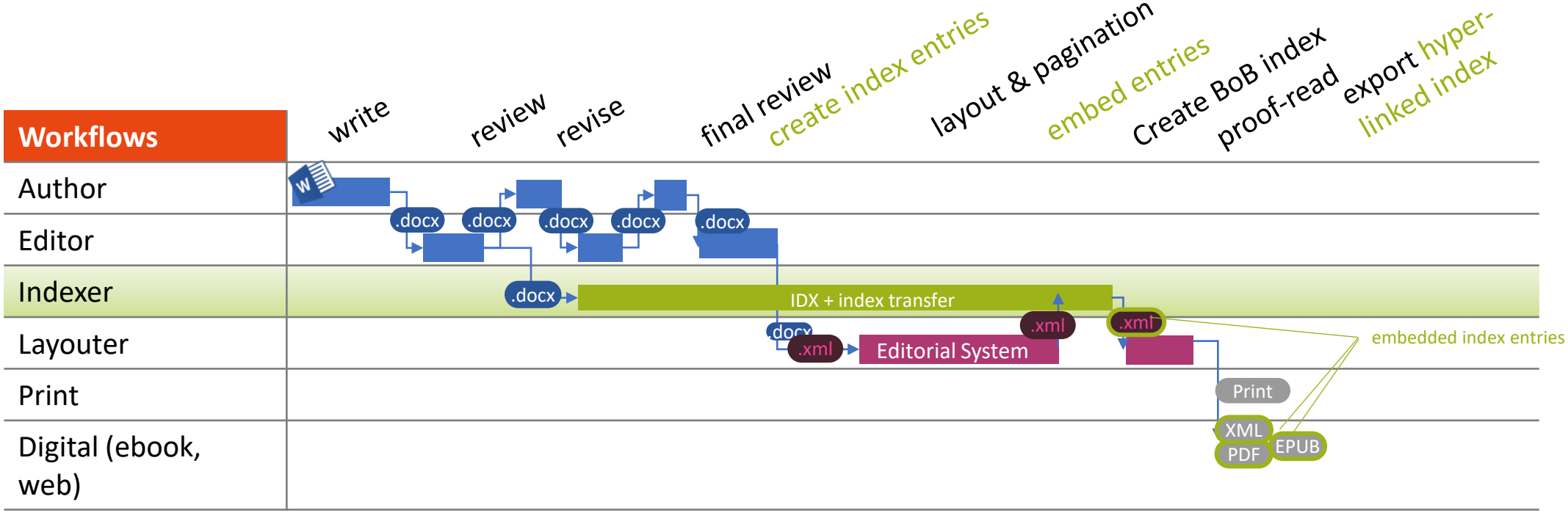
Book production workflow
C: Word → InDesign, Index-transfer

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



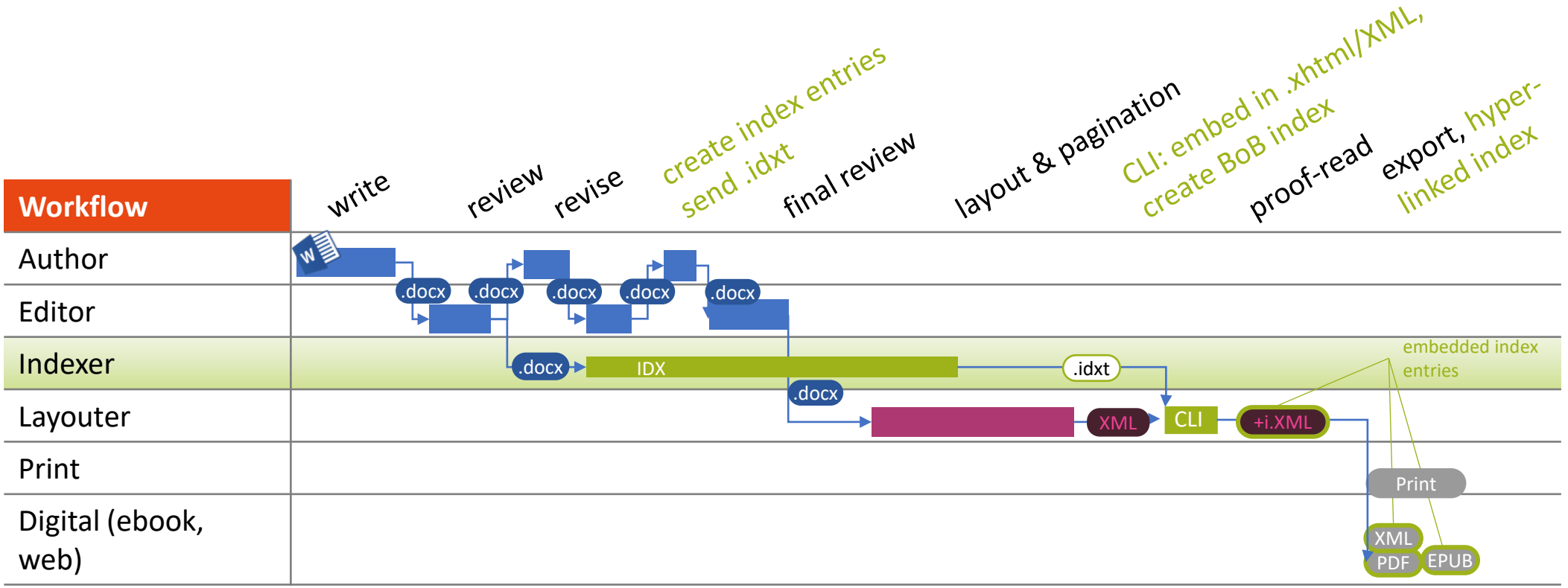
Book production workflow
D: XML-First, Word → XML, Index-transfer

- 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

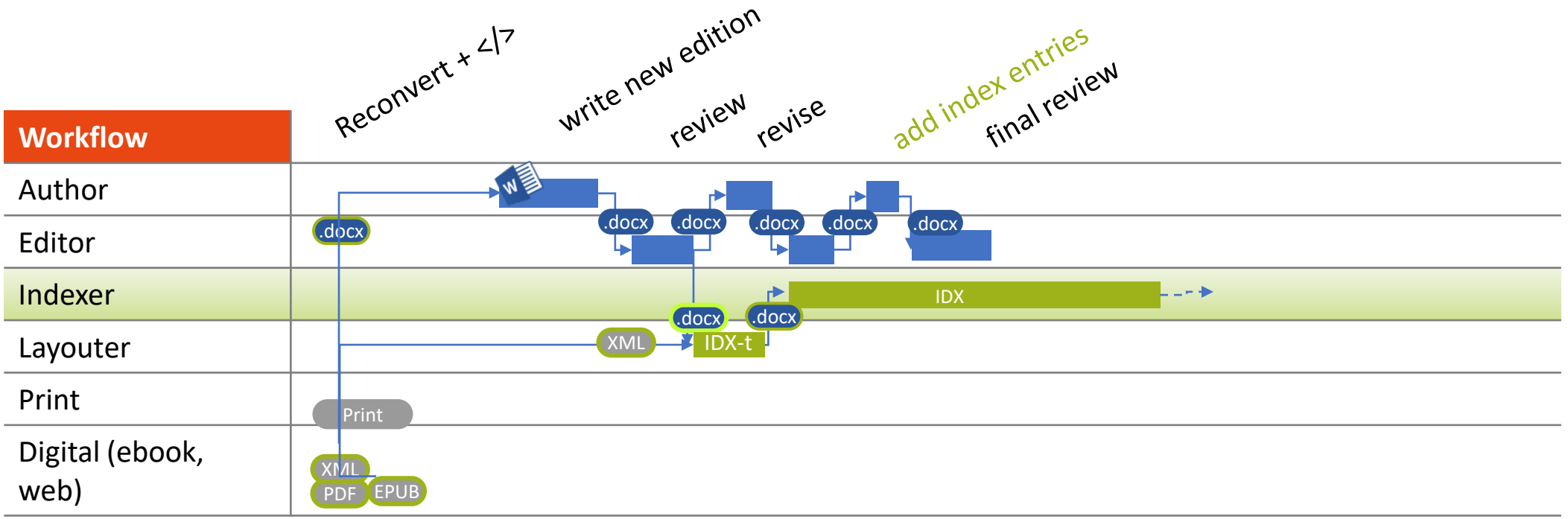


CLI (Command line interface)

- 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



Flexible modern software

Every project

Every indexer

Every publisher,
every company

Every manuscript differs

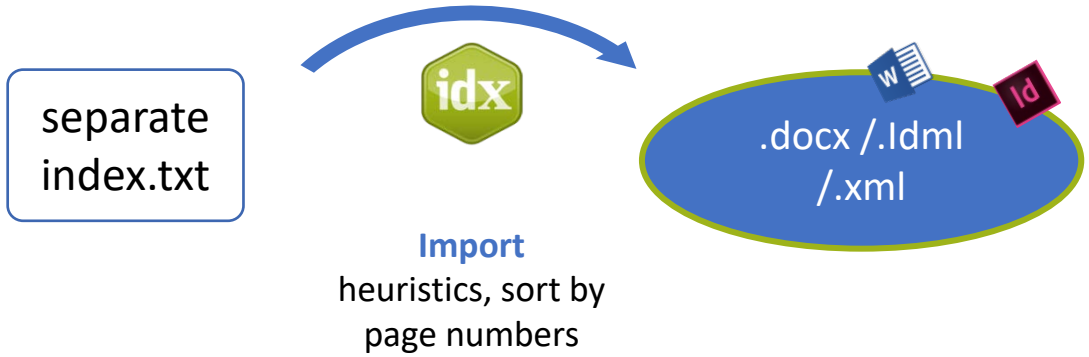
However you want to do it, Index-Manager is by your side

Add-on Index-Import

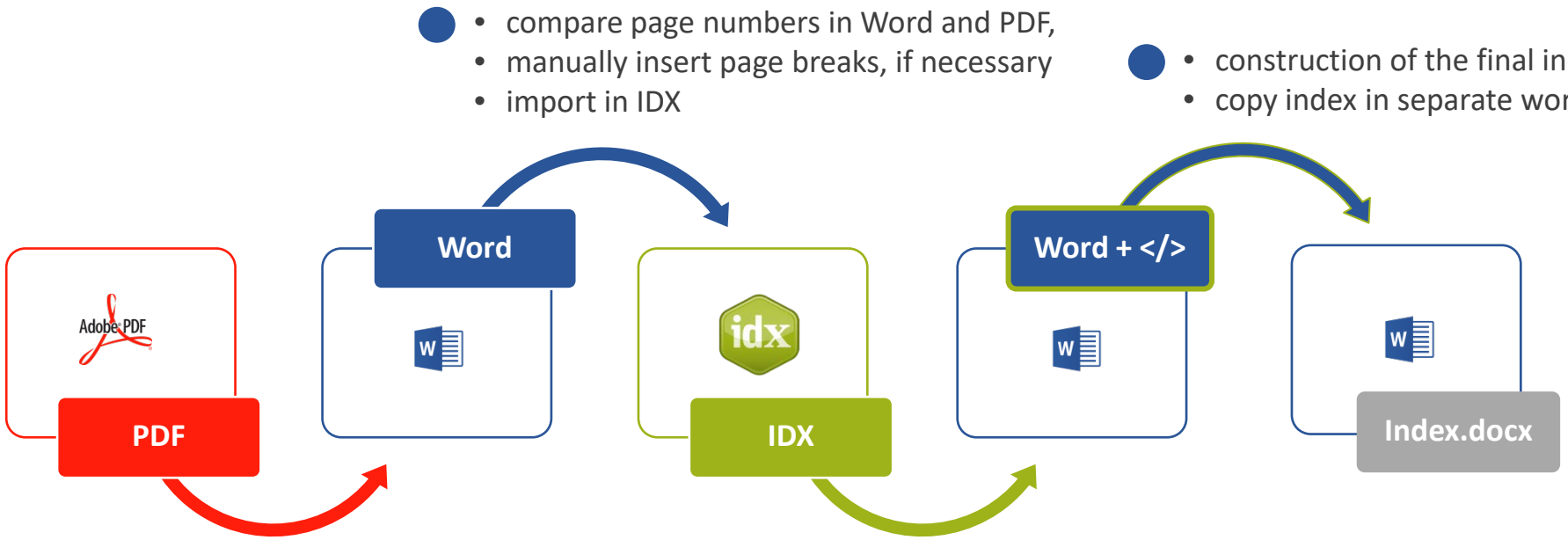
Import of an existing separate index as .txt

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

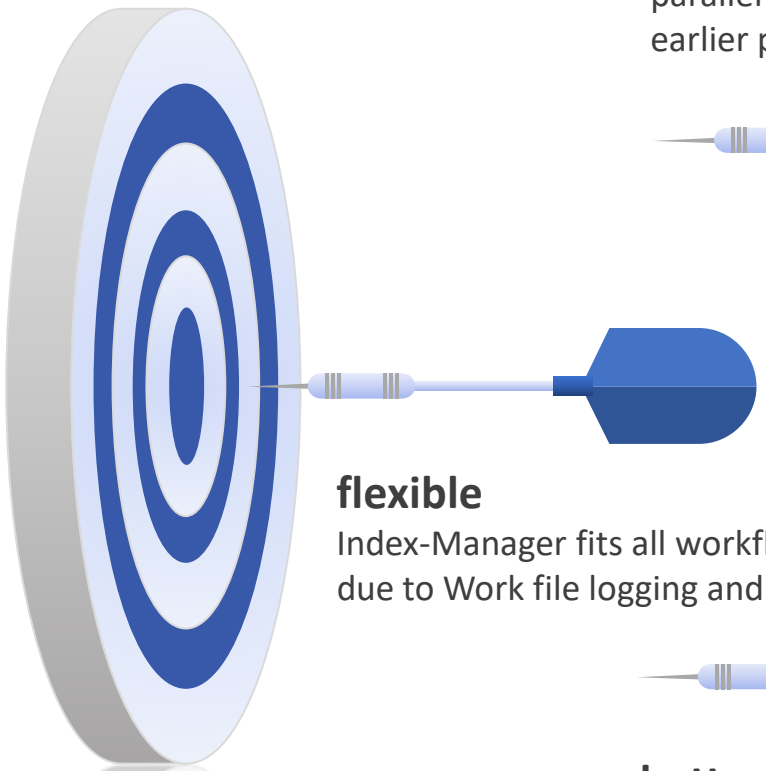
- **However you want!**



BoB in Index-Manager



How we are innovative – Transformation in Indexing



earlier
parallel workflows allows earlier publishing

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

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

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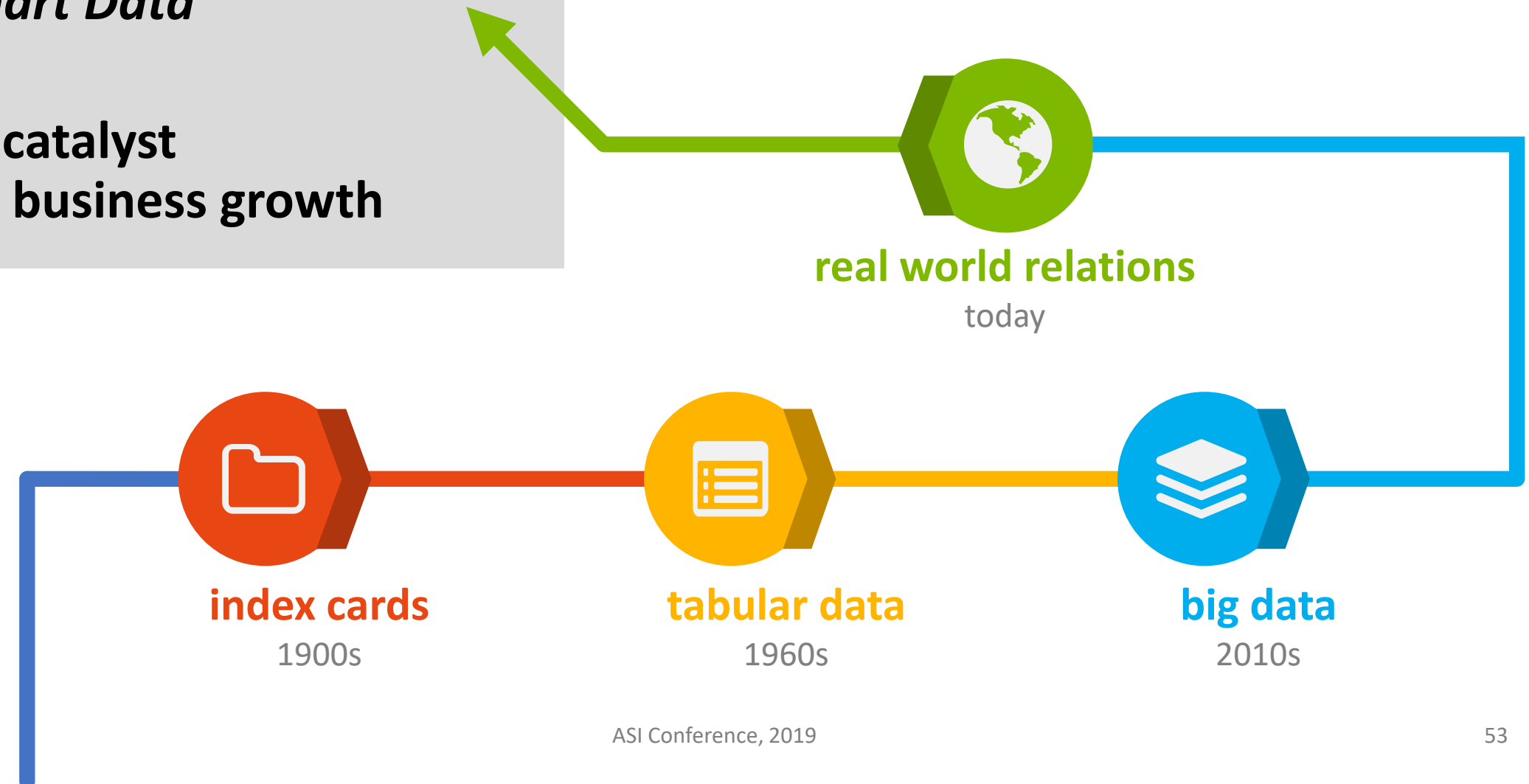
Shift in the Information Landscape

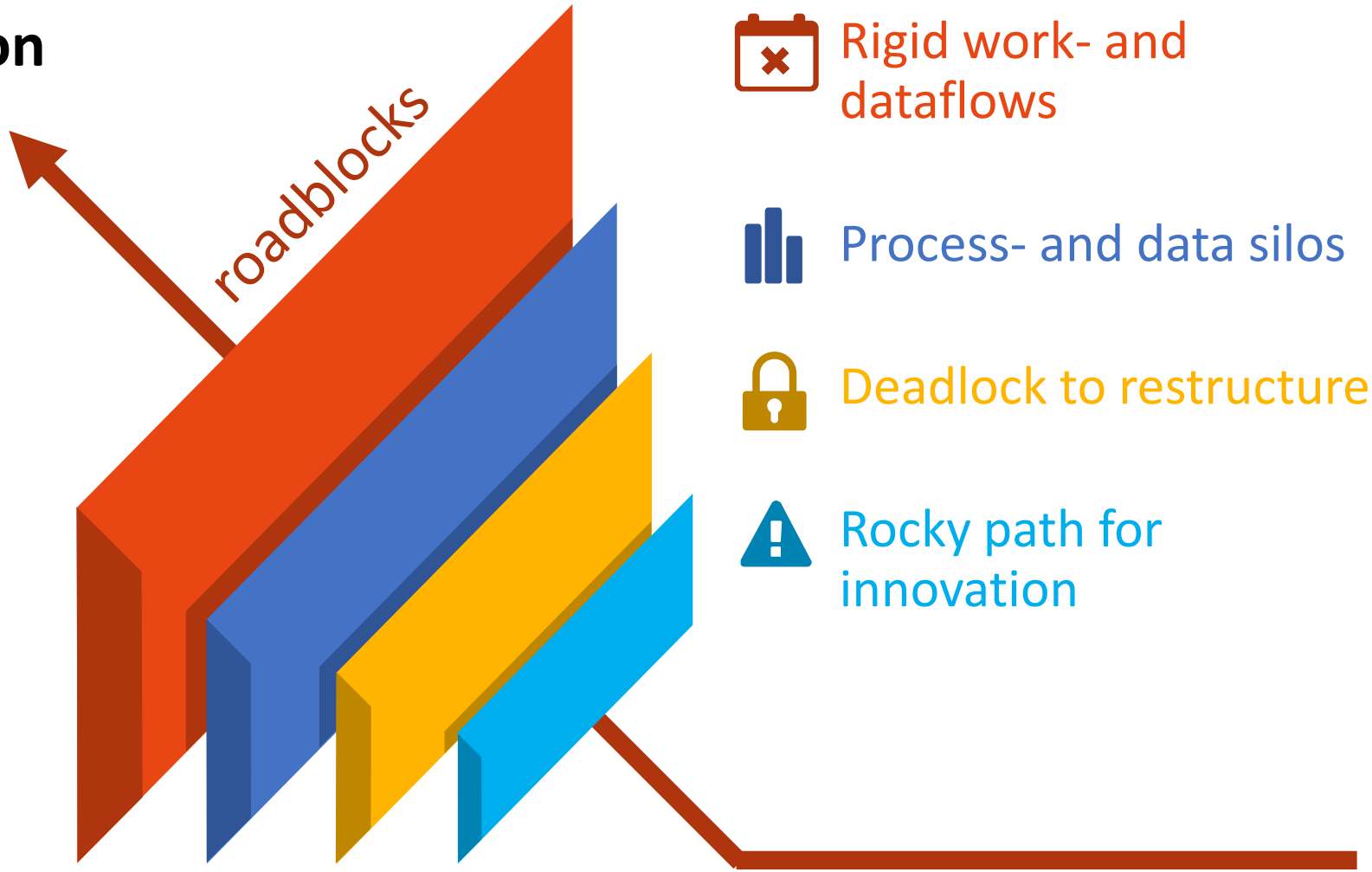
Smart Data

#1 catalyst
for business growth



Challenges to Building the Smart Data Future

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



Rigid work- and dataflows

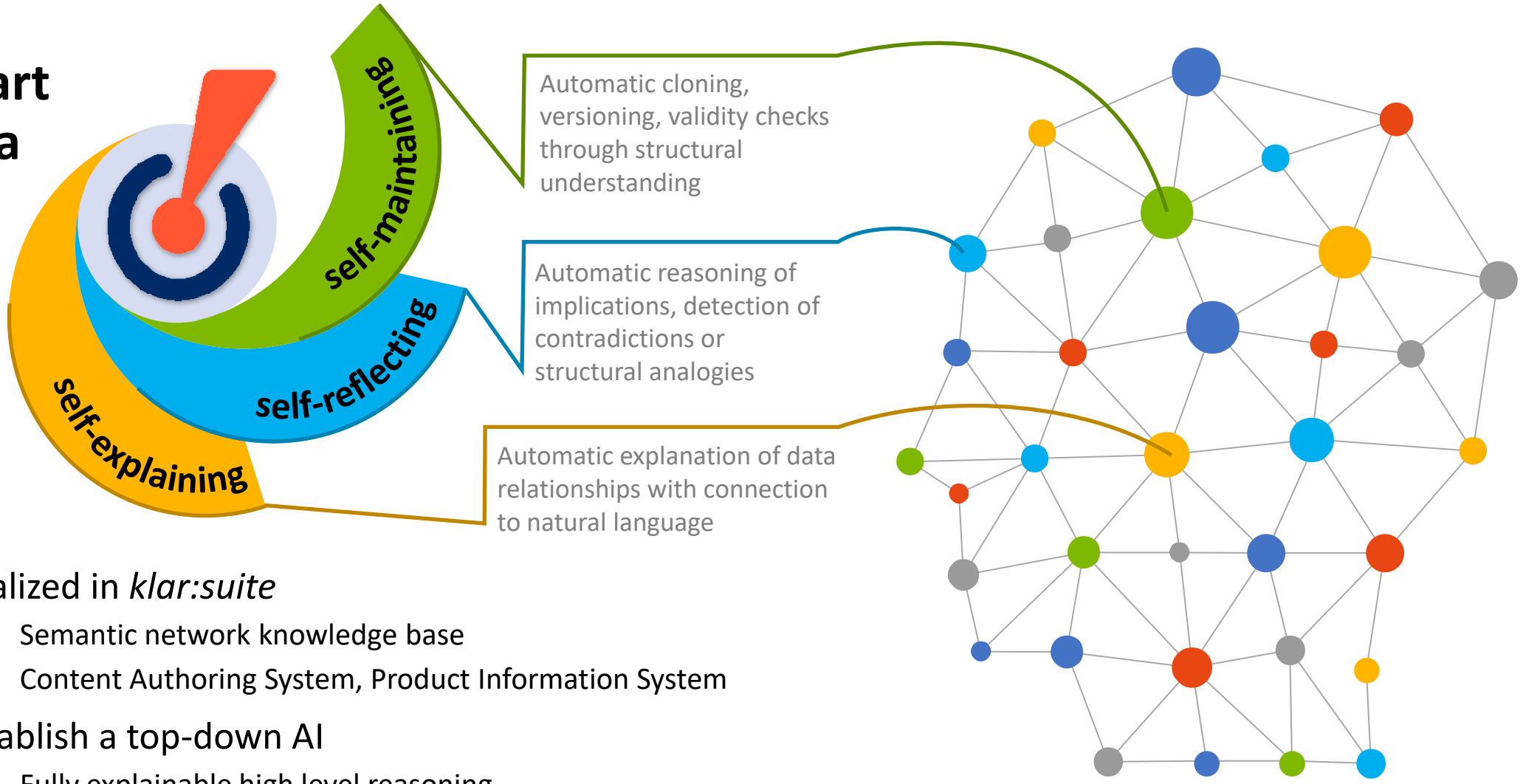
Process- and data silos

Deadlock to restructure

Rocky path for innovation

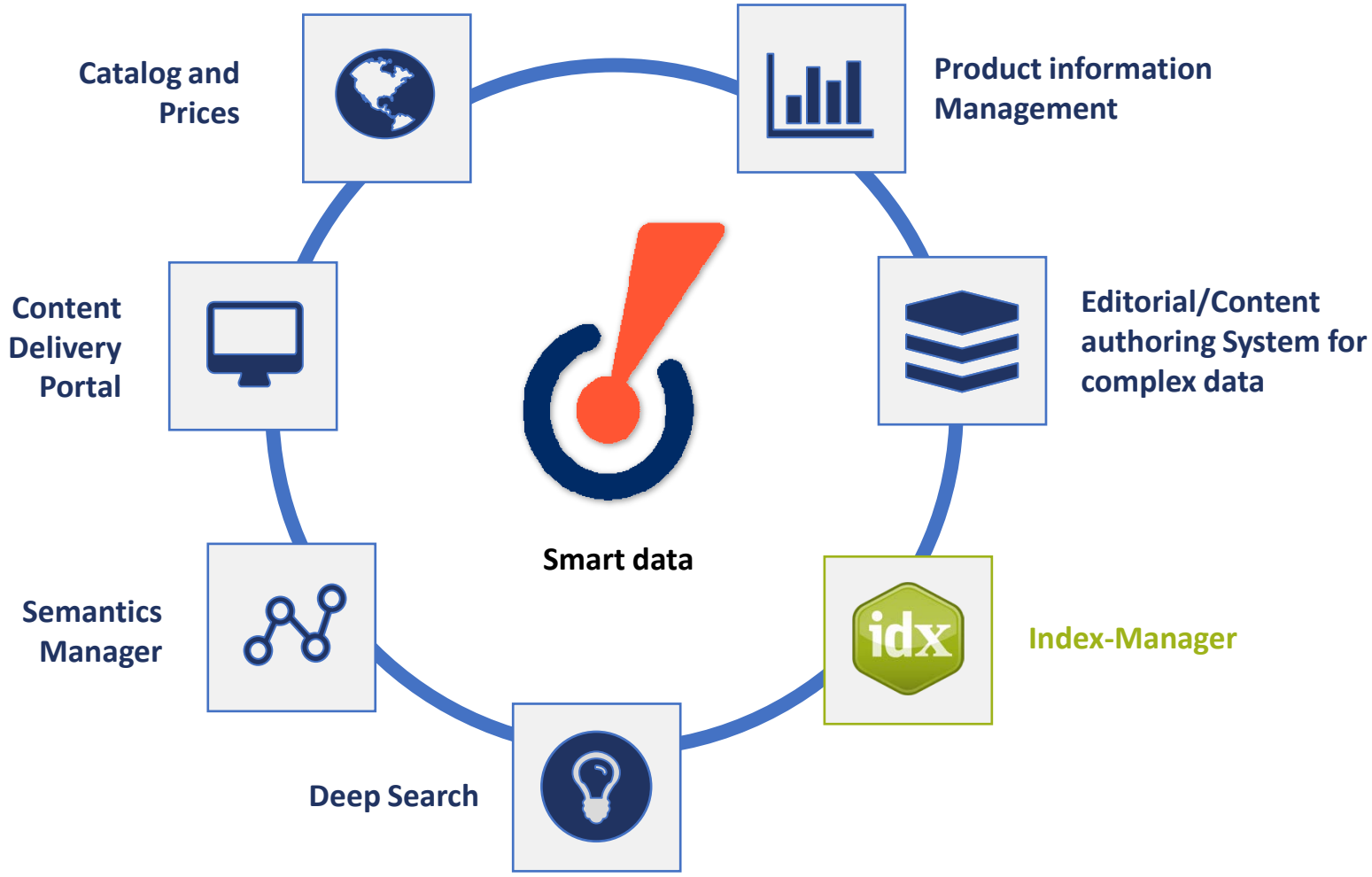
Smart Data to Create Your Top-Down Artificial Intelligence

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



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

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

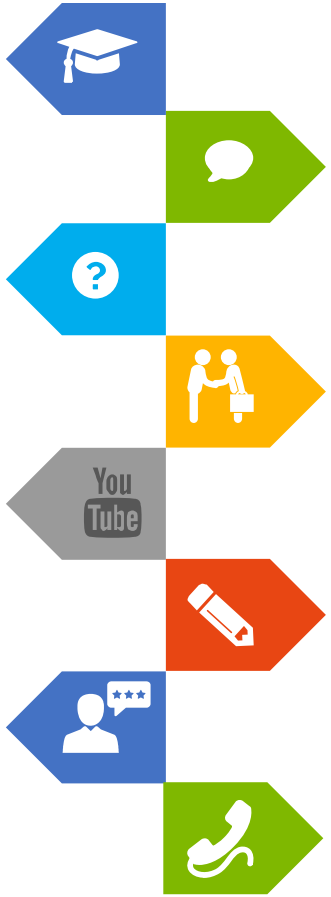
Premium Training and Support

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

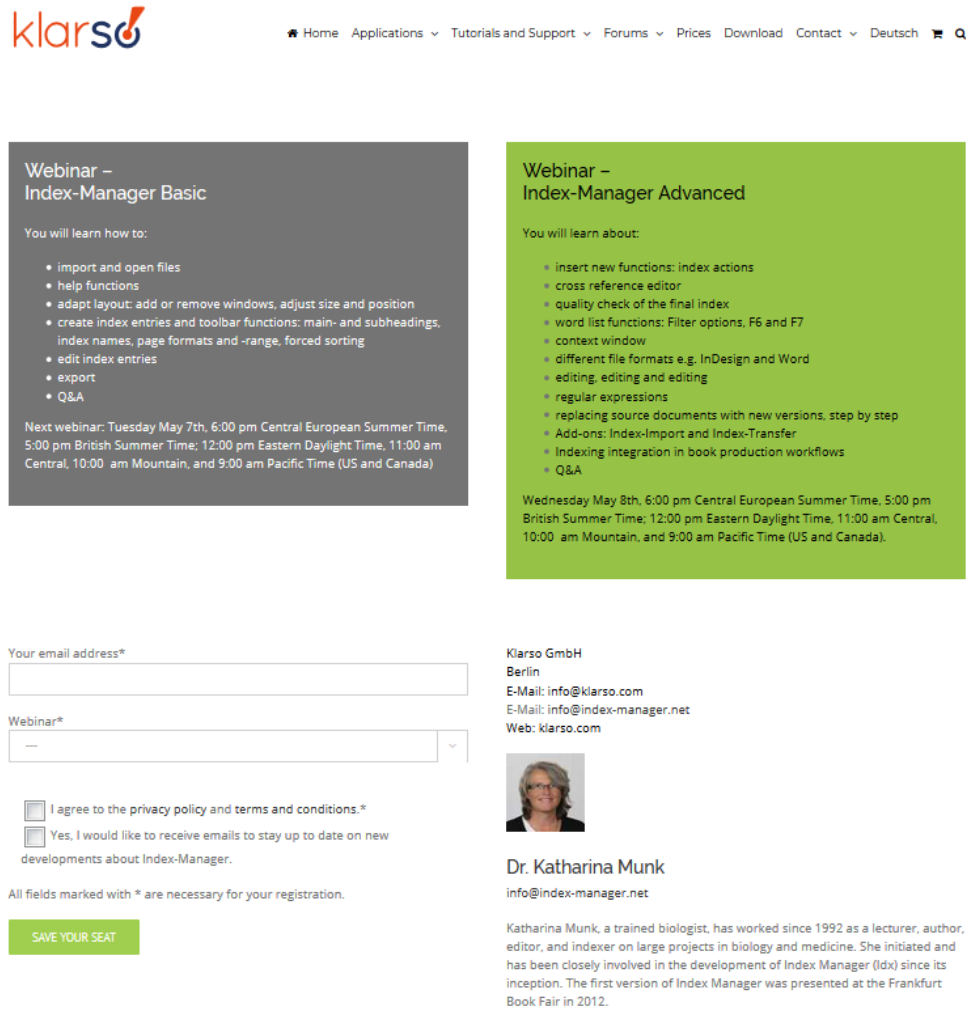
Forum
Community help

Email
Fast response times

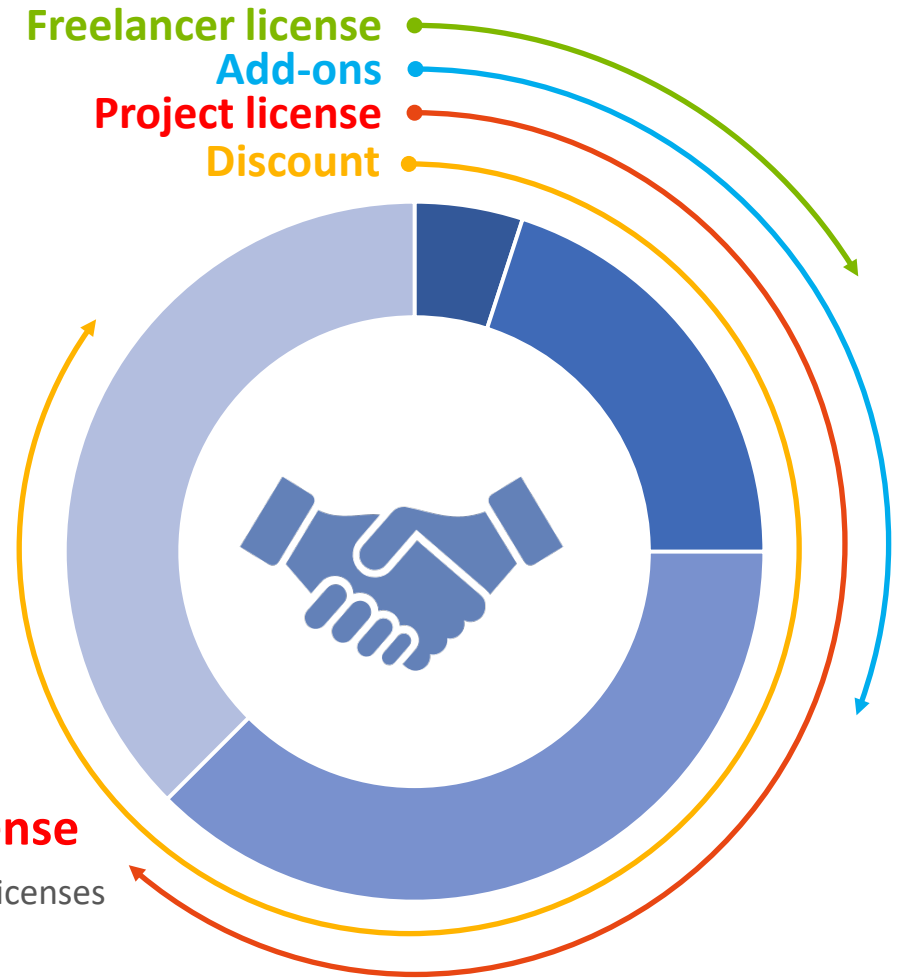
Telephone
Mobile accessible

www.index-manager.net

Test license, 2 weeks
Free Webinars, every 2 weeks



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

Publisher Indexer license

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

Add-ons

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

Thank you for listening

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