Index-Manager: An Overview

id·x index·manager

by Pilar Wyman

At the 2012 Frankfurt Book Fair, members of the German Indexers Network (DNI) introduced me to Katharina Munk and her son Johannes. They were developing a new indexing software for embedding indexes into Word and other desktop publishing programs and they wanted to show me their product.

Earlier in the week, I had given a talk to the Tools of Change Frankfurt Conference on e-book marketing and monetization via indexing—potential use of linked and dynamic indexes as marketing tools for e-books. [1] At the German Indexers Network (DNI) meeting, I talked about the current status, recommendations, and future directions for indexing in e-books.[2] I was "doing the rounds" on behalf of the ASI DTTF (Digital Trends Task Force) and the newly finalized EPUB3 specifications for indexes. E-books and embedded indexing were clearly on the horizon, and we were scrambling to ensure indexing's place in electronic book publishing and to find the holy grail of efficient embedded indexing.

I was certainly interested in exploring new tools for indexing, especially any that might make embedding easier. I am a long-time user and advocate of Cindex, and am used to robust index editing. I love Cindex, and only wish it were easier to "drag and drop" my indexes—and their cross-references and page ranges —into the books they accompany.

Katharina and Johannes showed me their software, Index-Manager. I was so pleased with what they showed me I almost fell off my stool. The program was all in German, and we worked with German files, but I could see that it worked. I could see my index building on the right side of the screen, alongside the text of the document I was indexing on the left. I asked about some improvements I'd like, such as double-posting, cross-referencing, and flipping names, I think. I asked about highlighting a chunk of text and then writing a heading and subheading for that chunk, to be later embedded and tagged appropriately. They showed me how to edit select groups of entries, and how to search across files. It was all doable.

They also showed me the result: an embedded index. Index-Manager creates a log of instructions to embed the index based on how you have written it. After you export your work (with a single click on the export button), those instructions are placed into the source document. All you have to do to see the index in the final document is generate it in the document software. The biggest catch, as far as I could tell, assuming they made the tweaks I wanted, was that the program was only available in German.

I encouraged them to translate Index-Manager and make it available in English so I could show it to my colleagues in North America. We exchanged cards. I was so excited. I looked forward to hearing from them.

Four Years Later

At the 2016 Frankfurt Book Fair, I presented a talk with **Pierke Bosschieter** on the benefits of linked indexes.[3] As Ann Kingdom reported, "if only publishers would realize how much they could enhance any non-fiction publication. Pilar left the audience feeling excited about the opportunities that properly constructed linked indexes could provide." (*The Indexer*, Vol. 35 No. 2 June 2017: 87.)

What really excited me, however, were some familiar faces. Katharina and Johannes, who I had not heard from, were sitting quietly in the audience, their faces shining with smiles. I was delighted to see them, and was curious to hear what had happened to their software. We chatted briefly, and they asked if we could meet later so they could show me the latest developments.

Sure enough, they had done it! We met in one of the lounge areas and they popped open their laptops and showed me the latest version of Index-Manager. They had incorporated all my requested adjustments, and more. They had translated the software (almost 100 percent) from German into English. They had also just left their previous employer and formed their own company (with colleague Christian Piepenbrock):

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[1] "The Book as Discovery Tool: E-book Marketing and Monetization via Indexing," Tools of Change Frankfurt Conference, Frankfurt, Germany, 9 October, 2012.

[2] "Indexing e-Books: Current status, Recommendations, and Future directions." Deutsches Netzwerk der Indexer/German Network of Indexers (DNI) Fall meeting, Frankfurt, Germany, 11 October, 2012.

[3] "The Added Value of Linked Indexes and Notes in e-Books," Frankfurt International Indexing Conference, Frankfurt Book Fair, 20 October, 2016.

Klarso GmbH (Berlin), Semantic Software Solutions for Smart Data. Index-Manager is one of their products.

I was happy to say yes when they asked if I would help them distribute it to North America.

Index-Manager Background

Dr. Katharina Munk, a trained biologist, has worked since 1992 as a lecturer, author, editor, and indexer on large projects in biology and medicine. She is a member of DNI and has been closely involved in the development of Index-Manager (Idx) since its inception. Her son, Johannes Munk, a computer scientist with a keen interest in natural language processing and semantic networks, wrote Index-Manager to assist her indexing. Johannes continues to upgrade the tool as he incorporates feedback from indexers and other users.

The tool he created is an all-in-one solution. Idx is a dedicated and powerful indexing software program which offers the same functionality as other dedicated indexing tools. Idx also inserts those index entries into your source document files.

I have used Idx for both Word and InDesign projects. After writing or creating index entries, I export those index entries from Idx into document files of the books they go with, and then I open those files in their source software and generate the indexes for my clients. (When working with Word, for example, I also click on "reveal codes" to check the embedded index entries.)

It's a pleasure and quite reassuring to see the final product (or close to final; I don't usually do typesetting or layout). Even more so, if you're working with InDesign, you can convert and export that final book file into an interactive PDF or EPUB, wherein the index entry page number locators will be dynamic and clickable and will take you directly to the right content. (When making such e-books, I again here take a moment to look at the code, and confirm the embedded index entries.)

Finally, dynamic, linked, embedded indexing—for electronic or other editions, just as our clients wish.

When you don't have to worry about the accuracy of your page number locators, you can focus on the intellectual side of your work. It's a joy to index this way, and opens up pathways to more rigorous, thorough, and quality indexing work.

Index-Manager Today

Index-Manager (Idx) is available for Windows, Mac, and Linux platforms, and works with Microsoft Word, InDesign, DocBook other XML files.

Individuals can purchase short-term (three-month) or annual licenses. Business licenses are also available.
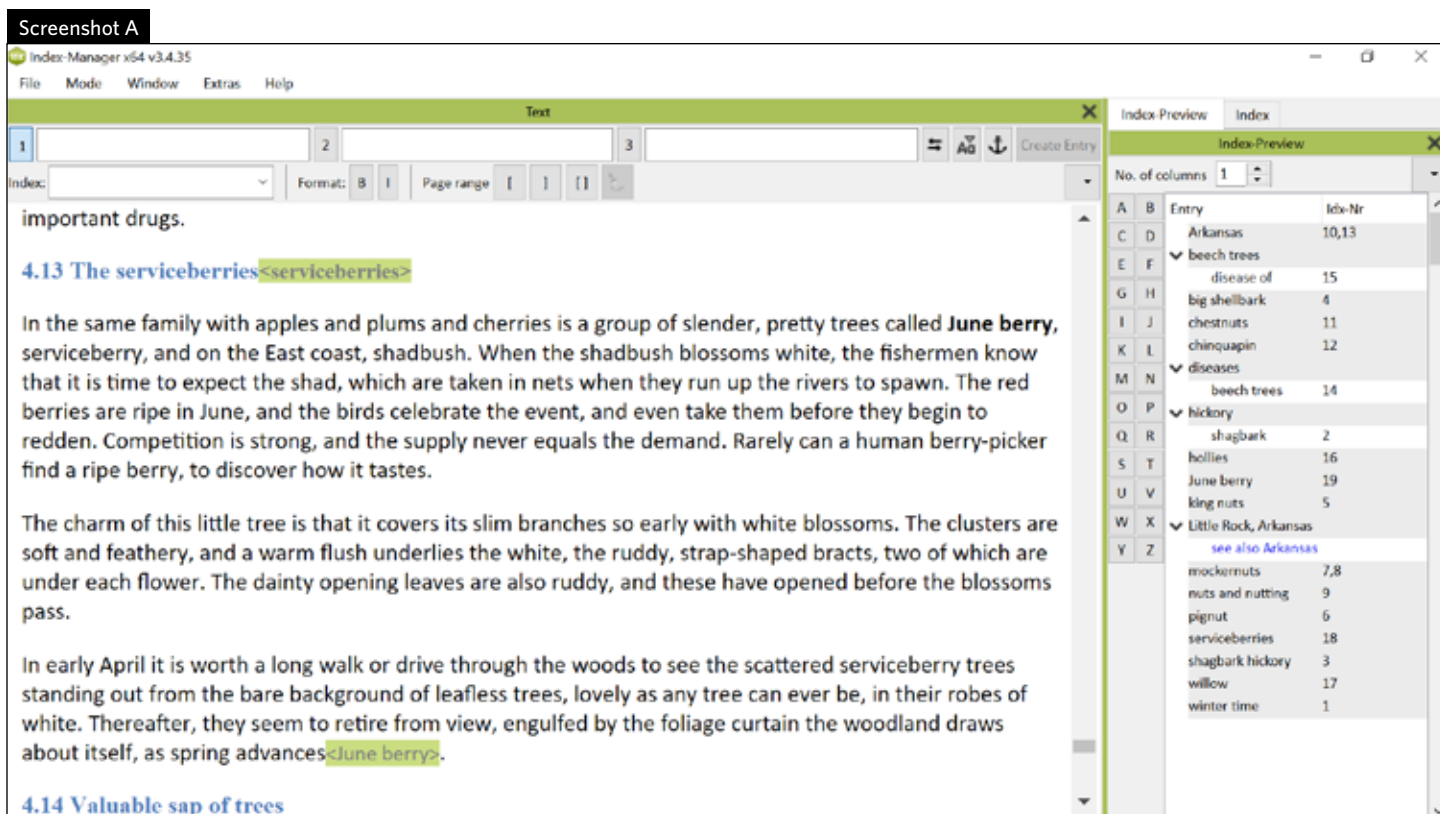
All licenses include updates, as well as online tutorials and support via email or telephone or Skype. Katharina also provides free online training webinars every two weeks on basic and advanced features. I learn something new every time I watch and listen. (There is a lot to learn in the program, and there is a brief, steep learning curve.)

Johannes is constantly updating Idx, as I said above. Ideas for new feature are always welcome. His latest improvements included fixing autocompletion for the index input field, providing duplicating and swap functionality for *see also* cross-reference input, adding warnings when no identical cross-reference targets are available, and sorting by file name. Additional add-ons include:

- Index-transfer. Convert index entries from one document file version to another (from Microsoft Word to Adobe InDesign, for example).

- Index-import. Import entries created with a standalone software package such as Cindex (Idx format export option). Idx will place the entries where it thinks they go as best it can. You then finalize the process.

Help is provided via contextual help keys, a PDF manual, a FAQ file, video tutorials, a discussion forum, and email or Skype communications with the support team.

Screenshots for typical index entry work in Index-Manager. The Index Preview is selected for display in (Screenshot A, above) and the Index text window is selected for display in (Screenshot B, next page). The main Text window (on the left, in both, from Trees Every Child Should Know, *by Julia Ellen Rogers) shows the text of the document being indexed. Text to be embedded as index entries is shown in the Text window in angle brackets and green highlights.*

Basic Procedures

After first installing and opening Idx, you load or *import* book files to index. Well-structured documents work best, as these include internal divisions which Idx can use to measure indexing and navigate.

Arrange your desktop windows as you like via typical drag-and-drop operations. (I typically put my source file on the left side of my screen, and then index windows on the right. I only open the cross-reference window when I'm making or reviewing cross-references.) As a Windows user, I find that Idx operates much like other advanced Windows programs. There are multiple ways to access and implement functions, whether you use a mouse, key stroke combinations, a touch pad, laptop, desktop, etc.

Generally, the display in the main text window will jump to match whatever index entry you just worked on, to show where you have chosen to embed that entry. You can also view the text around search terms via the Context window. I typically work in Text mode, which makes the main text window most prominent.

Select content or click where you want to *index* and embed entries. Create entries by double-clicking text or free-text typing into the index input field. You can then *edit* index entries as you work, entry-by-entry in the input field or the index list or index preview, or later in groups in the Edit mode. *Verify* your work via index preview at all times. (When you make changes

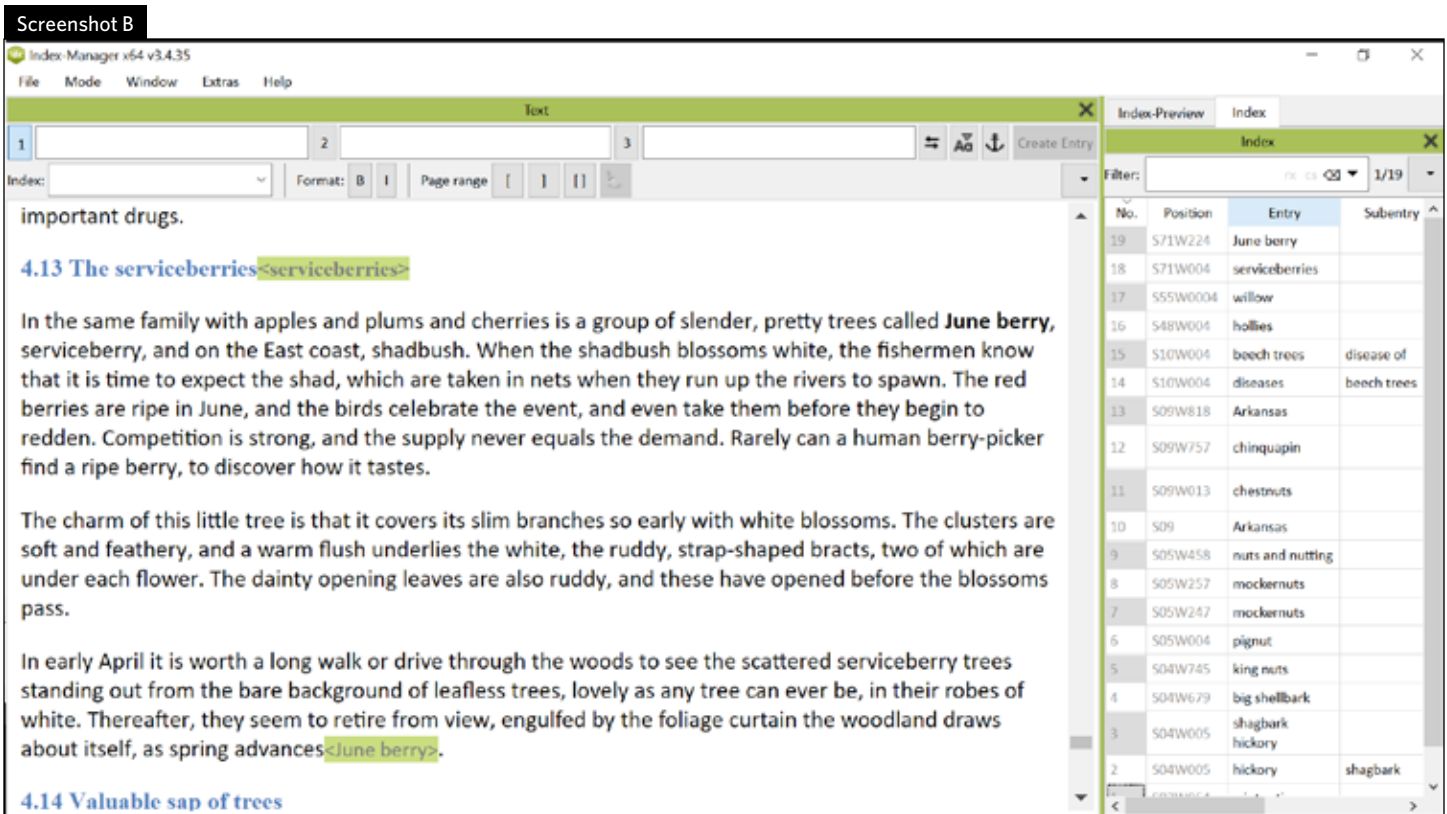to index entries in the index preview, those changes will be made to all such tags in the loaded book files.)

Screenshots for typical index entry work in Index-Manager. The Index Preview is selected for display in (Screenshot A, above) and the Index text window is selected for display in (Screenshot B, next page). The main Text window (on the left, in both, from *Trees Every Child Should Know*, by Julia Ellen Rogers) shows the text of the document being indexed. Text to be embedded as index entries is shown in the Text window in angle brackets and green highlights.

After input and editing, export your index instructions into the source document. You can then generate your index in the source document software whenever you are ready, as frequently as you want. This separate logging of the index allows other tasks, like copyediting and proofreading, to be accomplished while you are indexing. You can also export your index as a text file at any time (helpful for proofreading).

Additional Features

You can create multiple indexes at one time for a source document. Then, when creating index entries, indicate which index they go into. All the same editing functions then apply. This is very useful when creating multiple indexes for a work, such as author and subject indexes, for example.

You don't have to re-type most content. Auto-type will complete index entries when you are free-text typing headings.

Screenshot B

In addition, multiple built-in shortcut actions are available for easy flipping or swapping of terms. To enter names, for example, you can click on or select names in their natural order, as they appear in text, and then later, while editing, for example, you can swap the order to last name, first name for appropriate alphabetization. You can do this for a group of entries with just one click instead of retyping. Similarly, you can swap parenthetical text such as acronyms and full terms, for easy double-posting.

You can customize and make your own shortcut index actions. The default shortcut list is also quite thorough and includes marking index content for bold or italic display, switching case of initial letters, merging levels, swapping levels, swapping names, and swapping parentheses.

You can search (and replace) your index work with filter options, and with regular expressions.

You can work with several hundred files at once, if you need. Book files can be discrete chapter documents, that is, or single files. You can also accept new or updated versions of files, and incorporate work you already did (Idx will work to match content and will query you if it can't discern where any previous entries should be placed).

You can work alone on a project or with colleagues.

Sophisticated users will also take advantage of the Word List feature which gives an automated overview of the source document(s). Its semantic and statistical functions can help you extract and create terms.

You will see similar statistical analysis when you export your files, including how much indexing transpired for each document—this is very useful when working with multi-chapter file projects, and can help you confirm consistency of indexing coverage.

Planned Updates
• Index preview for multiple indexes
• Multi-user, databased central repository for files
• Spell correction
• DTD for Text Encoding Initiative XML support
• Archive Manager

To learn more about Index-Manager, and download a free trial version, please visit the Index-Manager website. ∎

Pilar Wyman, Chief Indexer and Consultant, Wyman Indexing, has been writing indexes as a successful freelancer since 1990. She works in English, Spanish, and French in health, medicine, technology, and other areas of personal interest. She has served ASI as president, international representative, and on many committees including the Wilson Committee for Excellence in Indexing. She teaches and gives presentations and workshops as her time allows.