

# Getting Started

A short guide to indexing in Index-Manager  
Klarso GmbH, May 2021



Software for professional indexing  
www.index-manager.de

Six easy steps to install and get to know basic Index-Manager functions. To follow along, we recommend you work with a DOCX test file. You'll be able to try out functions and export before starting your first real indexing project.

## 1. Download & Installation

Click on "Download trial version" on <https://index-manager.net/en/download-en> and fill out the download form. Then confirm with "Download + New licence". You will receive an email with the installation package and your personal licence key. Follow the instructions for installation.

## 2. Start the program


- The Index-Manager interface opens with the start dialogue. To load a file, click on "Load manuscript files" in the middle under "Files". The Windows File Explorer will open.
- Select the file for which you want to create an index. You can load **one or multiple** document files, in the file formats: **DOCX** (MS Word), **IDML** (Adobe InDesign), **DocBook**, **XML** (DTD adaptation required).
- Click the "Start" button. Now you will see the rest of the Index-Manager user interface in front of you.
- The "Text" window shows the manuscript text. The "Index" window shows in tabular form index entries that already exist in the text. The "Index preview" window shows existing index entries in an index preview form.

## 3. Create Index entries

### Create a 1-level index entry

Review the "Text" window of the manuscript text. Select a desired index term or phrase by double-clicking it. The selected text will then appear in the top "Text" window toolbar in field "1" marked in blue. Click "Create Entry" or use the keyboard shortcut [Ctrl]+[e] to create an index entry for this text at the text position. The entry text will then be inserted into the text with a green background. Note that the entirety of the selected text has been set as the index entry.

**Live monitoring:** The created index entry also will appear immediately in the "Index" window and in the "Index preview" window. The first entry for your new index is created!

 Learn more in the Index-Manager manual: "3.1 Creating Main Entry and Sub-Entries".

### Edit term on entry

To edit index entry text before creating an index entry (e.g. to adjust inflectional forms such as singular or plural), select the term and the position for the entry by double-clicking as described above, then click in field "1" and change the text as you wish. Set the new text or phrase as an index entry by clicking "Create Entry" or the keyboard shortcut [Ctrl]+[e].

### Create a 2-level index entry (main and sub-heading levels)

Select the desired term or phrase for the main heading as above, by double-clicking. Once the text is in the "Text" window toolbar in field "1" and marked in blue, click on field "2" to the right of it and enter sub-heading text. Then click "Create Entry" or use the keyboard shortcut [Ctrl]+[e] to set the index entry. Additional levels can also be set this way.

 Learn more in the Index-Manager manual: "3.1 Creating Main Entry and Sub-Entries".

## Create cross references

Mark a term as a new main entry. Click in the top toolbar field “1” where the term appears and add “=” after the term (be sure there are no spaces before and after the equal sign). Then type the cross-reference you want to connect to the term. Follow the form, “[term]=[cross-reference]” (e.g. “FAQ=Frequently Asked Questions”). Set it as an index entry by clicking “Create Entry” or the keyboard shortcut [Ctrl]+[e].

- 📌 Use the “Cross-references” window for additional functions.  
Learn more in the Index-Manager manual: “5. Cross-references”.

## 4. Checking the index

The “Index preview” window displays all index entries sorted alphabetically, with multiple occurrences of terms **collated** as one entry and with sub-entries **indented**. Adjust your display to show one or more columns side by side and quickly navigate through the alphabet. To make corrections directly in the “Index preview” window, double-click on entries or sub-entries.

- 📌 Learn more in the Index-Manager manual:  
“8.1 Correct directly in the index preview” and “6. Edit/Edit Index Entries”.

## 5. Export index entries

Click on the menu item File > Export to open the Export dialogue. Click “Export.” Wait a few moments until “Export completed” is displayed at the bottom left. **Done!**

Close Index-Manager. Your manuscript file now has embedded index tags and is ready for further processing, including generating the embedded index.

- 📌 Learn more in the Index-Manager manual: “10. Export”.

## 6. Optional: Generate the index in the manuscript file

During export, Index-Manager inserts index entries into the manuscript file’s true format. The embedded entries can be generated into a full MS Word or Adobe InDesign index by using the native program’s functions. Here is the example in MS Word (DOCX):

- Open the DOCX-file you just worked on in Index-Manager (the sample file, if applicable) in MS Word.
- To see the index XE field tags, click the Home menu “show/hide” button for hidden paragraph marks and other formatting symbols or use the keyboard shortcut [Ctrl]+[\*]. Click again to turn them ‘off’.
- To generate the index, position your cursor at the end of the document and click “Insert Index” from the References menu. Your index will then be displayed with corresponding page numbers.

- 📌 Learn more in the Index-Manager manual:  
“10.1 Your index in MS Word”, or “10.2 Your index in InDesign”.

## We hope you enjoy using Index-Manager!

Was this short guide to indexing in Index-Manager helpful?

We’d love your feedback!

Contact us via email: [info@index-manager.net](mailto:info@index-manager.net)

## Become an indexing expert

As you index more documents, have fun with Index-Manager’s specialized functions. For the full manual, lots of helpful indexing resources and video-tutorials, visit our website:

[www.index-manager.net](http://www.index-manager.net) → Tutorials & Support

