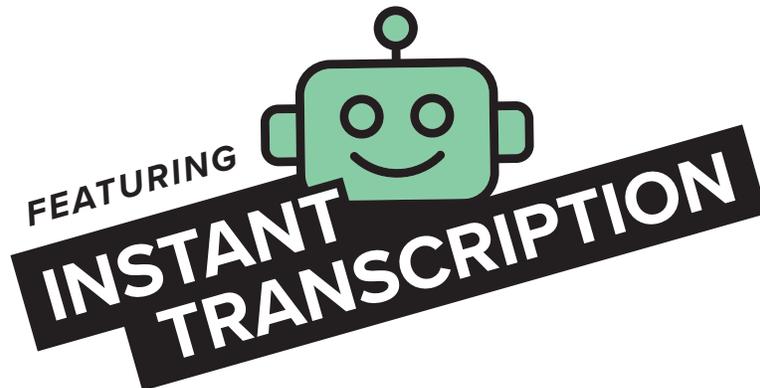




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Archive Settings 2 of 12

Archive Owners: learn these powerful Settings by clicking the “cog” to the right of your email (after login)

OVERVIEW & SUBSCRIPTIONS TAB

In the “**Overview**” tab, the Archive’s Subdomain, Name, and Description can be altered at any time. Use choice words—they are key to search engine and AI relevance. Beware! Altering the subdomain will make all shared links that once used the prior subdomain obsolete.

In the “**Subscriptions**” tab, Archives may be toggled between “Public” or “Private” at any time. To understand the difference, see Kindex’s “Terms” at Kindex.org. Because anyone may access a Public Archive and have limited write capabilities, sensitive or private data is best contained within a Private Archive.

Users may also insert coupons, update their credit card, downgrade to Collaborator (thus suspending their Archive), or cancel their entire Archive and Account.

COLLABORATE TAB

It is here where Archives can become collaborative. Archive Owners can send out automated email invitations with only an email address. Green emails and names imply acceptance—gray implies non-acceptance.

Those who accept may read, search, download, add, and transcribe records at no cost. Once invitations are accepted, all shared Archive are listed in each Collaborator’s “ARCHIVES” dropdown.

HOMEPAGE TAB

Every Archive, whether Public or Private, has a customizable Archive Homepage.

In the “**Customize**” column, Owners brand their homepage with a specific color, logo, or background image.

In the “**Featured Records**” column, Owners may emphasize a specific Collection on the Homepage, intended to persuade Collaborators to select a randomized record from that Collection. Owners may also feature a single Record on their homepage to garner general interest from the public.

In the “**Write a Post**” column, Owners may post up to 3 messages of their choosing. Transcription guidelines by the Owner are often posted here.

In the “**Entities**” column, Kindex automatically extracts Persons, Places, Dates, Events, and Subjects from all Records marked “Instantly-Transcribed” or “Complete”. These entities—but not their context—can then be published to the world in A–Z lists on the owner’s public-facing Homepage. Owners must opt in to feature their Entities.

TOOLS TAB

In this tab, Owners may activate the publishing of their record’s metadata, or download their Archive media and/or Transcriptions.

TRANSCRIPTION IS ALWAYS A COMPETITION!

Visit the Leaderboard on your homepage to see which users are the most active in your Archive!

File Prep & Upload 3 of 12

PROCESS-1 *(on computer)*

- **Rotate** records in a preferred program (if necessary). Kindex can “batch rotate” any number of JPG/PNG files.
- **Remove** duplicate and blank pages.
- **Determine** if:
 - content is human-legible, and contrast is sufficient
 - page content or pages themselves, are complete
 - crop is accurate (do not use Acrobat’s crop tool)
- **Re-save** changed files to prepare for Process-2.

PROCESS-2 *(on computer)*

- **Ensure** files are in web-compatible PDF, JPG, PNG, GIF, MP3, M4A, and MP4 formats, and do not exceed 500MB.
- Choose to **Separate** or **Stitch** multi-paged media. To separate, extract each page, name each sequentially, and place all into one folder to become a Collection or Subcollection. To stitch or leave stitched as a PDF, 10–12 pages is a good maximum.
- **Re-save** all changed files.
- **Rename** files (see Naming & Sorting). Learn to “batch rename”.

PROCESS-3 *(in remote Kindex Archive)*

- **Add Collections/Subcollections** if necessary.
- **Select & Upload** like records, assign record category during upload. Upgrade to Granite Pro™ to upload folders!
- **Review** rejected files by hovering atop each red “X”, repair where necessary, and re-upload. The Transfer Log spreadsheet is most useful when uploading a myriad of files.

Naming & Sorting 4 of 12

[record type] - [numbering convention] . [extension]

Example: “Letter-01.pdf” (Page 1 of a 99-pg journal)

DOCUMENT Type PDF

- “Cert” (Certificates)
- “Email”
- “Env” (envelope only)
- “Form”
- “Letter” (can include envelope)
- “Note”

VOLUME Type PDF

- “Book” (Book / Booklet)
- “BOR” (Book of Remembrance)
- “Cal” (Calendar)
- “Diary”
- “Jrnl” (Journal)
- “Pamph” (Pamphlet)
- “Scrapb” (Scrapb)

IMAGE Type JPG / PDF

- “Art” (Art / Illustration)
- “Hrlm” (Heirloom)
- “Neg” (Negative)
- “Photo”
- “Slide”

AUDIO Type MP3

- “Clip”
- “Intrvw” (Interview)
- “Music” (Instrumental/Song)
- “Talk” (Speech)

NUMBERING

When ≤ 99 files in collection:

“01–99”

When ≤ 999 files in collection:

“001–999”

When ≤ 9999 files in collection:

“0001–9999”

COMPATIBLE FORMATS

Document = “.pdf”

Image (1 page) = “.jpg”

Image (≥ 1 page) = “.pdf”

Image (embedded OCR) = “.pdf”

Volume = “.pdf”

Audio = “.mp3” “.m4a”

Video = “.mp4”

Records/Collections/Subcollections are sorted by name in a **Natural Sort** order, the same way your computer organizes files/folders/subfolders. Although “more human” than an Alphabetical Sort, an Alphabetical naming convention can benefit automated systems.

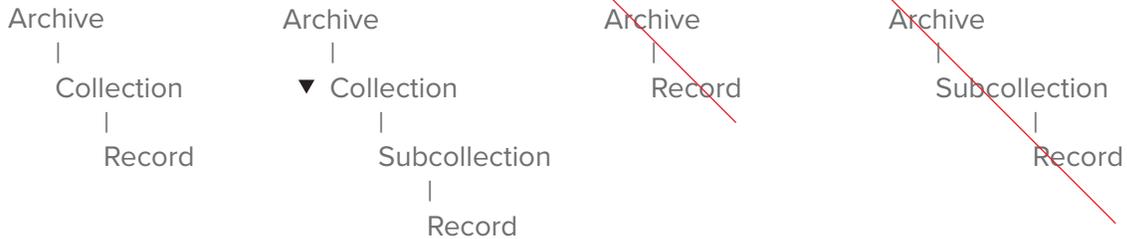
NATURAL	ALPHABETICAL
jrn1 -pg01	jrn1 -pg01
jrn1 -pg3	jrn1 -pg22
jrn1 -pg22	jrn1 -pg3

If Record Type is not listed,
create a custom Record Type,
≤6 characters long.

Archive Structure

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GENERAL HIERARCHY



CHRONOLOGICAL COLLECTIONS

“1920s”
(Collection)
|
“1923”
(Subcollection):
|
“Jrnl-001.pdf”
(Page 1 of 120-pg journal)-

MEDIA TYPE COLLECTIONS

“Journals”
(Collection)
|
“Brown Journal”
(Subcollection):
|
“Jrnl-001.pdf”
(Page 1 of 120-pg journal)

CHRON. + MEDIA COLLECTIONS

“1920 Journals”
(Collection)
|
“1923 Journal”
(Subcollection):
|
“Jrnl-001.pdf”
(Page 1 of 120-pg journal)

PERSON COLLECTIONS

“Ford, Henry”
(Collection)
|
“1923 Journal”
(Subcollection):
|
“Jrnl-001.pdf”
(Page 1 of 120-pg journal)

CODED PERSON COLLECTIONS

“01 Henry Ford”
(Collection)
|
“1923 Journal”
(Subcollection):
|
“Jrnl-001.pdf”
(Page 1 of 120-pg journal)

“02 Clara Ford”
(Collection)
|
“1923 Journal”
(Subcollection):
|
“Jrnl-001.pdf”
(Page 1 of 120-pg journal)

Note: Kindex permits you to organize your archive however you choose. But once all your records are transcribed, Kindex’s SEARCH provides an alternative method to retrieve and discover all of your data—at once!

Instant Transcription Tips

6 of 12

High-quality text extractions depend on the nature of originals. Records conforming to these tips generate *excellent* extractions.

Tip #1: Clarity of text

Clear, crisp text performs best! Blurry, overly-stylized, reversed, sloppy, or text “bleeding through” will hinder quality text extractions.

and



and

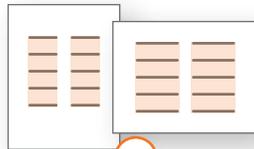


and



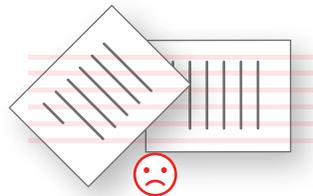
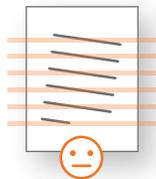
Tip #2: Defined, limited text blocks

Organized and limited text blocks with defined edges perform well.



Tip #3: Text rotation

Consistent, *horizontal* text baselines are key. If a record is not rotated properly in Kindex, select “↻ Rotate” before Instant Transcription.



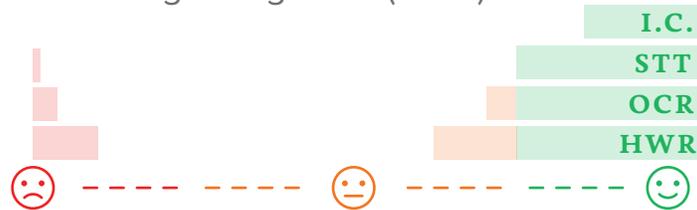
Tip #4: Proper data capturing

Capture all available data, and maximize its scale within its space.



Tip #5: Performance rankings

Our consistent champion is Image Captioning (I.C.), followed by Speech-to-Text (STT), typed text (OCR), and last but nonetheless impressive, handwriting recognition (HWR).



Tip #6: Transcribing tables

male	Houston	Father	High School
female	Miami	Mother	College
male	Houston	Father	High School
female	Miami	Mother	College

Records with typed text among tables perform better than those with handwriting. Defined borders always create better table outputs.

Complex tables may require additional table work in the text editor.

Tip #7: English preferred

Although our service extracts text from non-English records, our STT and Image Captioning services are strictly English-based.



I see and transcribe many written languages, but I only hear and create captions in English.

Tip #8: If you can't read it or hear it, our machines can't either

Discernible speech and text legibility are key to human & machine recognition. Machines still can't do it all! For superior results, use Kindex's **Instant Transcription Service** to gain a "👉", and *then* human-correct to gain a "✅", meaning "Complete".

Tip #9: HAVE FUN! Don't be afraid to experiment.

This is an entirely new service never before seen. Be proud, you're among the first to use cutting-edge technology with your records!

Transcription Unity

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Providing guidelines on your Homepage directs a unified writing style throughout your Archive, and in Books

PICK YOUR TRANSCRIPTION STYLE

A “**literal transcription**” is when a transcriber *intentionally preserves* the written record’s spelling, punctuation, capitalization, strikeouts, and grammatical errors. *Only literal transcription standards are outlined in this PDF.*

A “**normalized transcription**” is when a transcriber *modernizes* text to improve readability. All spelling, punctuation, and grammatical errors are corrected. Because speech often contains filler words, repetitious word use, or muttering, **speech-based transcriptions are often normalized.**

WHEN AND WHEN NOT TO MATCH LAYOUT

Tables & Captions: When text resides in table cells or as captions, text placement matching is advised.

Paragraphs: Because Kindex reveals the original beside the transcribed text, the original layout is *already* manifest, and therefore it is not advised to match text placement in the text editor according to the placement in the original. Although indent and alignment tools are provided, matching text positioning is tedious and creates problems when transferred to books or screens of various sizes.

Line endings: Although Kindex’s Instant Transcription Service often preserves line endings, it can make the text inflexible when transferred to books or screens of various sizes. To allow text to flow more naturally, select the text editor’s “Toggle Line Breaks” tool. If selected, paragraph recreation may be necessary. *Decide early to preserve or abandon line endings!*

TO INTERJECT, USE BRACKETS

Enclosing a transcriber’s comments within brackets [] can imply:

- commentary apart from the original author/speaker’s genuine words
Transcription: April 31st [Likely April 30th or May 1st?]
- questions which can be corrected later—in such cases, adding a unique word or set of characters before or after the written question enables search to find all questions at once)
Transcription: After seeing your mother dance at the college ball,
I wished she was my date instead!
[*Question*: Who was your date?]
- corrections to *significant* misspelled nouns or words—this enables “Search” to find exact matches, instead of hiding results due to misspells.

KINDEX'S LITERAL TRANSCRIPTION STANDARDS

Spelling: Do NOT correct misspells. If the word is likely to be searched, correct the misspell in brackets which enables the search to pick up on the correct spelling.

Original: Micheal picked raspberries.
Transcription: Micheal [Michael] picked raspberries [raspberries].

Casing: Except for when the author uses all uppercase letters or random casing, match all casing as is.

Original uppercase: WE WENT TO MACEY'S ON FRIDAY.
Transcription: We went to Macey's on Friday.

Original random casing: We wENT To mAcEY'S ON fRIdAY.
Transcription: We went to Macey's on Friday.

Original: We went to macey's on friday.
Transcription: We went to macey's on friday.

Punctuation—Dashes: There are three types of dashes, a hyphen, an “en dash”, and an “em dash”. Choose wisely when discern between dashes in handwriting.

A HYPHEN “-” represents a break within a word, or may join two words to make a single adjective.

An EN DASH “—” represents a distance between two values, such as birth and death dates. The en dash typically matches the width of the lower case “n”.

To type an en dash, select:

“**Option + Hyphen**” (with a Mac or Apple Computer), or
“**Alt + 0150**” (with a Windows-based computer on a number pad), or
“**Windows Key + .**” where a variety of symbols may be selected

An EM DASH “—” represents a strong break, or an abrupt change mid-sentence. It may also be used to attribute a quote to its source. “—William Shakespeare”
The em dash typically matches the width of the lower case “m”.

To type an em dash, select:

“**Option + Shift + Hyphen**” (with a Mac or Apple Computer), or
“**Alt + 0151**” (with a Windows-based computer on a number pad), or
“**Windows Key + .**” where a variety of symbols may be selected

When the Instant Transcription Service is used, a hyphen “-” is usually generated opposed to any other dash. Where possible, correct the dash type.

Punctuation—Apostrophes: A common misnomer among fonts/word processors is that single quotes are often replaced by single tick marks (as in feet), and double quotes are often replaced by double tick marks (as in inches). Unless tick marks imply feet or inches, always use the curly quote marks!

Learning these terms will help you easily navigate Kindex

archive (*noun or verb*) a web-based software platform that enables its subscriber to control the storage, organization, transcription, searchability, access, publicity, and backup, of digitized historical media.

archive homepage (*noun*) a public, customizable website atop each archive which may reveal entity lists.

archive owner (*noun*) an admin user who may add, organize, transcribe, search, control access to, and backup media.

audio (*noun*) a record category signifying audible media (MP3, M4A).

collaborator (*noun*) a registered user who may add, transcribe, search, and share media. Collaborators of Private Archives are formally invited.

collection (*noun*) a subset of a Kindex Archive which groups related media.

collection list (*noun*) a place in Kindex where media subsets may be selected.

directory (*noun*) a public listing of both Public and Private Kindex Archives.

document (*noun*) a record category signifying document-type media (PDF, JPG, PNG).

entities (*noun*) Persons, Places, Dates, Events, and Subjects extracted from user-added data.

file (*noun*) media within a digital container residing on a *local* device (computer).

folder (*noun*) a virtual container used to group files on a *local* computer device.

granite pro (*noun*) a professional, add-on storage service for advanced users.

guest (*noun*) an unregistered, read-only user, barred from Private Archives.

image (*noun*) a record category signifying image media (JPG, PNG, PDF).

index (*noun*) a structured list that helps users locate specific data within an archive. (*verb*) the act of systematizing data to ease its retrieval and access.

instant transcription service (*noun*) a computer vision service that extracts multi-lingual text from handwriting, type, English speech, and describes images.

metadata (*noun*) technological attributes inherent in all digital files.

platform (*noun*) a cloud-based infrastructure where data is managed.

properties (*noun*) extraneous attributes associated with a record.

record (*noun*) media within a digital container that resides on a *remote* Kindex archive.

record info (*noun*) a place in Kindex to log a record's "extrinsic" data.

subcollection (*noun*) a subset of a Kindex Collection which groups related media.

transcription (*noun*) a manual or automated extraction of "intrinsic" data from a Kindex record into dynamic text.

video (*noun*) a record category signifying motion-graphic media (MP4).

volume (*noun*) a record category signifying bound or once-bound media (PDF, usually).



Records Intake Checklist 11 of 12

Interested in shipping records to Kindex? For safe and secure handling, follow this procedure for all Senders and Recipients

- SHIPPING & HANDLING**
Sender must ship to Kindex Mon–Wed. They must notify Recipient of **ship address, carrier, declared insurance amount, Tracking Number, and arrival date/time**. This ensures recipient is available to sign for material. Emailed or texted receipts are adequate if they include this detail. **Unless signed electronically, include the attached intake label (“Customer Digitization Agreement”) within the package.**
- RECEIPT**
Packages are received IN PERSON. Whether or not damage is found, recipient inspects and photographs package(s), and then emails or texts photos to Recipient. If damaged, recipient must notify sender. Adequate packaging is likely reused.
- INTAKE**
Contents are opened in a clean, dry space, and then carefully removed and placed into labeled banker’s boxes (gloves upon request). Kindex’s intake label is photographed and affixed to the banker’s box. This label also includes digitization preferences, box contents and counts, and other Kindex tracking data.
- TEMPORARY STORAGE**
Kindex is located within a secure building that has a consistent temperature of 70°F, +/- 5° F. It is located directly across the street from the Kaysville City Police Department, and is not in a basement. All records within the building are boxed, covered, shelved above ground, and kept away from light, heat, and moisture.
- PRE-PACKING, PACKAGING**
Before shipping, each item is verified against the intake label. Upon request, and to ensure all contents are returned, Sender may request Pre-Packing documentation. Unless original packaging is deemed inadequate for re-use, or Sender requests new packing material, items are likely to be returned using the sender’s packaging.
- RETURN NOTICE**
A photo of this document, initialed according to task completion while in Recipient’s possession, is sent to Sender via text/email. Once sent, the “Shipping & Handling” standards above are again observed by Recipient to return shipped material.

RECIPIENT ADDRESS:
Kimball Clark c/o Kindex
145 N 300 W
Kaysville, UT 84037-1826
PH# 801-458-0282

