
CINDEX™ 2.0 for Mac



Release Notes

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E-mail: info@indexres.com Web: <http://www.indexres.com/>

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CINDEX 2.0 for Mac

This document explains how CINDEX™ 2.0 for Mac differs from CINDEX™ for OS X.

You should read this document if you are upgrading from CINDEX for OS X. You do not need to read this document if you are a new user of CINDEX.

CINDEX 2.0 for Mac works very much like CINDEX for OS X. If you are familiar with CINDEX for OS X you should have no difficulty mastering CINDEX 2.0 for Mac.

Overview of New Features

User Experience

Cindex is generally faster, and provides major new editing capabilities including an exceptional ‘smart’ flip, and better checks for well-formed entries. The layout of many panels has been improved.

When *See* cross-references refer to fewer than a specified minimum number of target entries, Cindex can automatically convert them to fully-qualified entries.

Managing Index Files

Cindex routinely checks the integrity of indexes, and can repair records if they are ever damaged. A new **Revert to Saved** command restores the index to its last-saved state—useful if you have made some major changes to the index that you then decide to discard.

Managing Multi-Purpose Indexes

An index record can now contain a special field for holding a comment or a web address, etc. You can use multiple labels to control the visibility of different kinds of index records.

Formatting Entries

Headings and subheadings can be preceded by optional prefix text. You can override the standard index style on an entry-by-entry basis. There are new options for placing cross-references and for punctuating them automatically.

Sorting Entries

New capabilities include better handling of text in parentheses, preset options for *Chicago Manual of Style* or ISO 999 alphabetizing, and more refined sorting of locators.

Exporting Entries

Cindex can now export a fully formatted index as tagged text for Adobe InDesign. When you embed entries in other documents you can now control whether sorting information is also embedded.

System Requirements

Cindex 2.0 works with Mac OS 10.4 or higher. It will not run under any earlier version of OS X.

Compatibility

Cindex 2.0 can work with all documents made with Cindex for OS X, but note the following:

When you open an index (.ndxf) file made by Cindex for OS X, Cindex will make a new index document from it (with filename extension .cdfx). Cindex will preserve the old index, and will add a suffix “[V1 index]” to its name, leaving it otherwise untouched.

Because of a change in the way in which groups are managed, Cindex 2.0 will delete any groups that belong to the newly converted index.

Cindex 2.0 indexes cannot be opened by Cindex for OS X. If you want to open a Cindex 2.0 index in Cindex for OS X, make an archive. Archives can be used interchangeably among all versions of Cindex.

Menu Commands

New Commands

There are three new commands:

- A **Revert to Saved** command in the File menu. This restores the index to its last-saved state (see “Document Management” on page 4).
- A new **Hide by Attributes** command in the View menu (see “Viewing the Index” on page 6).
- A **Check for Update** command in the Cindex menu.

Commands Changed

- The **Labeled** command (Edit menu) now contains a submenu that provides additional labeling options. See “Record Attributes and Structure” on page 5.

There are new keyboard shortcuts for labeling records. The shortcut formerly used to label/unlabel records (COMMAND =) will apply/remove label 1 only. This shortcut is not visible in any menu item.

- **Generate Cross-References...** (Tools menu) has been extended and renamed **Manage Cross-References...** See “Managing Cross-References” on page 9.

Toolbars

Toolbar buttons for flipping record fields have changed functions. See “Adding and Editing Records” on page 5.

Some toolbar buttons in the record-entry window now have keyboard shortcuts. The shortcuts are identified in the tooltips associated with the toolbar buttons.

Document Management

Cindex checks the integrity of an index each time the index is opened. If Cindex detects any errors or damage, it will alert you and recommend that you let it repair the index.

Cindex now provides a **Revert to Saved** command in the File menu. This restores the index to its last-saved state. You might wish to do this if you have made some major changes to the index that you then decide to discard. Cindex updates the saved copy automatically at regular intervals if you have specified this via **Preferences...** Cindex also updates the saved copy when you choose **Save** from the File menu.

Exporting Documents

When you export index records in tab-delimited format you can now specify (via **Options** in the Save Panel) a minimum number of fields that Cindex should save. If a record contains fewer than this minimum number, Cindex writes empty fields between the last subheading field and the locator field.

Cindex can now export formatted indexes as tagged text documents for Adobe InDesign.

Preferences

Several new settings made via **Preferences...** provide you more flexible control of Cindex:

- Under the General tab you can set Cindex so that it automatically notifies you if an update is available. (You can also check for updates at any time by choosing **Check for Update** from the Cindex menu).
- Under the Editing tab you can specify whether Cindex does a 'smart' or literal flip when you exchange the contents of two record fields.
- Under the View tab you can specify the colors of 7 different labels that Cindex can attach to records. To change a label color, click the corresponding color well.
- Under the Export tab you can specify whether entries embedded in other documents carry special sorting information.

Record Attributes and Structure

A record may now have one of seven different labels, identified by text displayed in a distinctive color. To accommodate this change, the **Labeled** command now exposes a submenu, and the Label toolbar button now carries a drop-down list. There are corresponding changes in the Find and Replace panels, so that you can search for records that have a specified label.

Expanded **Preferences...** settings (under the View tab) allow you to assign a different color to each label. The keyboard shortcut formerly used for labeling and unlabeling records (COMMAND =) works, as before, to apply and remove Label 1 only. This shortcut is not visible in any menu item, and has no effect on records that carry other labels.

You can now specify (via **Record Structure** in the Document menu) that a record must always contain a special subheading field that you can use to store a comment or a URL, etc. At your option Cindex can ignore this field when sorting records and can hide it when it displays a formatted index. This special field, when present, is always the one immediately preceding the locator field.

In an index that already contains records you can now change (via **Record Structure** in the Document menu) the minimum number of record fields.

There is a new setting under **Reference Syntax...** (Document menu) to control whether Cindex recognizes cross-references entered as subheadings. The default (for new indexes) is to recognize cross-references only in the locator field.

Adding and Editing Records

The editor used when you make and modify records is improved:

- If you hold down the SHIFT key while you paste or drag text into the record window, Cindex will insert only plain text (discarding information about style and font).
- In addition to the warnings Cindex provides for mismatched {...} and (...), Cindex will warn you when you enter mismatched "..." or mismatched smart quotes ("...").

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- You can half-flip (promote) a subheading to a heading (discarding the heading at the level above). The shortcut for a half-flip (CTRL -) is the one previously used to flip headings without changing the case of initial letters.

A flip can be 'smart' at the user's option. In a smart flip Cindex adjusts the case of leading letters, and moves prepositions and articles, or the prefatory text to *see also* cross-references, if necessary. A new **Preferences...** setting (Editing tab) determines whether Cindex executes smart flips.
 - When you attempt to enter a record that is incomplete or badly constructed (e.g., contains mismatched angle brackets <...>), Cindex now displays information about the error in the status bar at the foot of the entry window.
 - When you use a function key to insert text in a particular font or style, Cindex no longer carries the style and font of the inserted text to characters you subsequently type.
 - The text of a labeled record is displayed in the color assigned to the label. To accommodate this change, text set in small caps is now denoted by normal text with a light gray background behind it.
 - When you revert a record to its initial state, Cindex now restores the original deleted and labeled status. Formerly only the text reverted to the original.

Viewing the Index

When you seek a record by typing its number or leading text in the main index view, Cindex displays the text in a small box at the foot of the window. This is colored red if no record matches the search specification.

When records are selected in the main window, you can extend the selection via the keyboard by holding the SHIFT key down while hitting the UP-ARROW or DOWN-ARROW key. If you select records by clicking and dragging in the main view, you can now continuously extend the selection and scroll the display by dragging off the bottom or the top of the view.

Because a record can now carry one of seven different labels there is a change in the way Cindex uses color to identify a labeled record in the fully formatted view of the index. Only the locators (page references or cross-

references) that belong to the labeled record are colored, unless the locator field has no text, in which case the last visible subheading is colored.

You can use labels to control the visibility of records. The new command **Hide by Attribute...** (View menu) allows you to hide records containing particular labels (or none). Records that are hidden are invisible to all commands that act globally on the index, except **Compress** and **Expand**, which ignore the **Hide by Attribute...** setting.

Find, Replace, and Spelling

When you are working with a fully formatted view of the index, **Find**, **Replace** and **Spelling** are sensitive to the setting of **Hide by Attribute...**

Find and **Replace** provide new options for searching among records:

- As in earlier versions of Cindex, you can confine a search to records that have particular attributes (New, Modified, Deleted, etc.), but you can now also confine a search to records that *lack* particular attributes.
- When you specify that the search involves labeled records you can now specify a particular label.
- You can specify dates more flexibly, and you can include a time with the date. If you specify a date but no time, Cindex assumes the time to be noon. If you omit the date (specifying only a time), Cindex assumes today. You can use simple English expressions as shortcuts, for example: *today* (12:00 a.m. today); *noon* (12:00 p.m.); *tomorrow* (12:00 a.m. tomorrow). To find all records made yesterday or today, you could enter *yesterday* as the starting date and *tomorrow* as the ending date.

User dictionaries for Spelling can now hold many more entries (~6,600).

Formatting Entries

In the fully formatted view Cindex can now provide prefix text immediately before the text of any level of heading. Set this via **Headings...** in the Document menu.

In a fully formatted index that is displayed indented, you can override the default layout of individual entries by including special text in records. If the last character of any heading or subheading is a vertical bar (|), Cindex will run-on all lower levels of heading for that entry. Cindex automatically substitutes the appropriate leading punctuation for the bar as it formats the entry.

Cindex provides (via **Cross-References...** in the Document menu) new options for placing and punctuating cross-references:

- Cindex can place *see also* references after all subheadings, except when there are no subheadings, in which case the cross-references directly follow the page references from the heading.
- Cindex can now automatically capitalize the first word of the prefatory phrase (e.g., "see..." or "See...") according to the placement and punctuation of the cross-reference.

Exporting Formatted Entries

Cindex can now export a fully formatted index as tagged text for Adobe InDesign.

Cindex now provides a richer export for QuarkXPress tagged text, including information about extra spacing before alphabetic groups and headings.

Markup tags you define for making tagged text documents can now contain encoded unprintable characters.

A new **Preferences...** setting lets you control whether entries embedded in other documents carry special sorting information.

Sorting Entries

There is a change in the way Cindex sorts text within parentheses. Formerly, in a letter-by-letter or word-by-word sort Cindex either treated the parenthetical text as a continuation of the text preceding the opening parenthesis, or ignored it altogether if you had checked **Ignore Text in Parentheses**. Cindex now distinguishes two kinds of text in parentheses:

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- A parenthetical phrase qualifying a preceding term. Cindex now sorts the heading so that it immediately follows any otherwise identical heading that lacks the qualifying phrase. The text in parentheses is ignored unless it is the only text that distinguishes headings.
 - A parenthetical ending to a word, such as cat(s). This is handled as before, according to the setting (now renamed) of **Ignore Parenthetical Endings**.

In addition to the letter-by-letter and word-by-word alphabetizing options formerly available, Cindex now provides preset collections of settings for two standard alphabetizing rules: those recommended by the 15th edition of the *Chicago Manual of Style*, and those recommended by ISO 999.

Cindex provides improved sorting of locators.

- Sometimes a text style (bold, italic, underline) is used to distinguish different types of references to the same page. You can now assign a precedence to different text styles (**Style Precedence** under the Locators tab). Cindex uses the setting when the text style is the only attribute that distinguishes two page references (or the least significant parts of multi-part references).
- If you are working with compound (multi-part) locators Cindex normally evaluates the different segments in the order specified by your setting of **Segment Order** under the Locators tab. If locators contain more than 10 distinct segments, Cindex ignores this setting and evaluates the segments serially, from first to last.

Managing Cross-References

The former **Generate Cross-References** command (renamed **Manage Cross-References...**) has additional capabilities. Cindex can now automatically convert *See* cross-references to fully qualified entries when the *See* references have fewer than a specified minimum number of target entries.

Compressing the Index

When you consolidate references from records containing identical headings and subheadings, you can choose whether to consolidate references from records that carry different labels.

Reconciling Headings

The **Reconcile Headings...** panel has been reorganized to make its functions clearer. You can use it to find and display entries that contain orphaned subheadings as well as to identify and correct entries in which headings and subheadings should be rationalized.

Getting Information about Indexes

When you use **Count Records...** or **Index Statistics...** to examine records in the fully-formatted view, Cindex attends to the setting of **Hide by Attributes...**, and examines only those records that would be visible in that view.

When you use **Count Records...** Cindex now provides separate counts of records with different labels.

When you use **Index Statistics...** Cindex now provides a count of the number of unique main headings.

Abbreviations

You can now print the active set of abbreviations with their expanded phrases.