
CINDEX™ 2.0 **for Windows**



Release Notes

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Cindex 2.0 for Windows

This document explains how Cindex™ 2.0 for Windows differs from Cindex™ 1.5 for Windows.

You should read this document if you are upgrading from Cindex 1.5 for Windows. You do not need to read this document if you are a new user of Cindex.

Cindex 2.0 for Windows works very much like Cindex 1.5 for Windows. If you are familiar with Cindex 1.5 for Windows you should have no difficulty mastering Cindex 2.0.

Overview of New Features

User Experience and Productivity

Cindex provides greater flexibility in working with indexes. You can more easily move around in the main view of the index, particularly while you are editing entries. There is a new optional interface for record entry, and major new editing capabilities including unlimited undo and redo, an exceptional 'smart' flip, and better checks for well-formed entries.

Cindex provides new checks for entries that use too many unqualified locators, and for orphaned subheadings. 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.

Searching

You can now search for records made or edited by a particular user. You can *exclude* from searches records that have specified attributes.

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.

Help

There is new and richer on-line help. Cindex can notify you automatically when an update is available.

System Requirements

Cindex 2.0 works with Windows XP SP2 or higher. It will not run under any earlier version of Windows.

Compatibility

Cindex 2.0 can work with all documents made by earlier versions of Cindex for Windows. Documents made by Cindex 2.0 are interchangeable with documents made by Cindex 1.5, with the following exceptions:

- Index files
- Index templates
- Index group files

When Cindex 2.0 opens an index or an index template made by an earlier version it will convert the index or template to a new format. It will also remove any groups that belong to the index. After conversion you will not be able to open the index or template with an earlier version of Cindex. Cindex will warn you before converting an index.

If you need to provide someone with an index that will work with Cindex 1.5, save it as an archive.

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.

Archives

When you open an archive (either with **Open...** or by double-clicking it), Cindex no longer automatically asks you if you want to make a new index or include records in an existing index. If no index with the name of the archive exists in the folder containing the archive, Cindex will automatically create an index of that name and read the archived entries into it. If an

index with the name of the archive already exists, Cindex will prompt you for the name of a new one.

To import records from an archive into an existing index, choose **Import...** from the File menu.

Use Dictionaries and User-Defined Tag Sets

Cindex now keeps user dictionaries and user-defined tag sets in a private folder unique to each user. Sets of markup tags provided with Cindex are distinguished from user-defined tags sets by having names that begin with \$ (e.g., \$AAP, \$UCP). When you install Cindex it automatically copies your existing user dictionaries and tags sets to this private folder.

Exporting Documents

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

Commands

New Commands

There are four new commands:

- A **Revert to Saved** command in the File menu. See “Document Management” on page 3.
- A **Redo** command in the Edit menu. See “New Editing Capabilities” on page 7.
- A **Hide by Attributes** command in the View menu. See “Viewing the Index” on page 8.
- A **Check for Updates** command in the Help menu.

Commands Moved

The following commands have been moved:

- **New Group** and **Save Group...** are now in the File menu.
- **Abbreviations...** is now in the Tools menu. The associated **Sort by Expansion** command has been removed (its function is handled by **Abbreviations...**).
- **Spelling...** (formerly **Check Spelling...**) is now in the Edit menu.

Commands Changed

Duplicate (Edit menu) has a new keyboard shortcut: CONTROL SHIFT Y. The old shortcut (CONTROL Y) is assigned to the new **Redo** command.

The **Labeled** command (Edit menu) now contains a submenu that provides additional labeling options. See “Record Attributes and Structure” on page 6.

Verify Cross-References... (Tools menu) has been extended and renamed **Check References...** See “Checking References” on page 11.

Generate Cross-References... (Tools menu) has been extended and renamed **Manage Cross-References...** See “Managing Cross-References” on page 11.

Toolbars

Buttons in the main toolbar for Alphabetical and Page Order sorting now have keyboard shortcuts (respectively, CTRL SHIFT A and CTRL SHIFT L).

Toolbar buttons for flipping record fields have changed functions. See “New Editing Capabilities” on page 7.

General Settings

Several new settings made via **Preferences...** (under the General tab) provide you more flexible control of Cindex:

- You can specify the action to be taken when Cindex starts: open the last-used index, display the Open panel, or do nothing.
- You can set the user identifier independently of whether you wish to be prompted to enter it on startup.
- You can specify the number (between 4 and 10) of recently-used index documents whose names Cindex will display in the File menu.
- 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 Updates** from the Help menu).

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 unlabeled records (CONTROL L) works, as before, to apply and remove Label 1 only. The shortcut is not visible as a 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

Cindex provides a new interface for adding and editing records. When you add or edit a record, Cindex opens up an entry window contained within, and at the bottom of, the main view window. This removes clutter from the screen. You can size the entry window by dragging the bar at its top. Cindex remembers the last-used size.

If you prefer to use the old interface, in which records are entered in a separate window, you can specify this via a new **Preferences...** setting (**Use Separate Window** under the Editing tab).

While using either the new-style or old-style record entry window you can move around freely in the main index view and select records for editing. When the record-entry window is open Cindex directs all keystrokes to that window or to the main view window, depending on which is active. To activate an inactive window, click it or hit CONTROL-TAB.

Several commands (e.g., **Find**, **Check References**, **Count Records**, **Index Statistics**) that were formerly disabled when the record-entry window was open can now be used when it is open.

Changed use of ESC key Hitting ESC now always closes the record-editing window and discards any changes to the record. To close the window and save changes, hit CONTROL-RETURN, or ENTER on numeric keypad.

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

- It provides unlimited undo, and corresponding redo of previous undo actions.
- If you have enabled auto completion (via **Preferences...** in the Edit menu) and Cindex has suggested a completion, you can hit RETURN to accept the selected text and open up a new record field. In any other context hitting RETURN behaves as before: it removes the selected text then opens up the field.
- 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 ("...").
- 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 hot 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.

Viewing the Index

The main window now provides smooth scrolling in both vertical and horizontal directions, with mouse wheel support. When a record is selected, you can extend the selection via the keyboard by holding the SHIFT key down while hitting the UP-ARROW or DOWN-ARROW key.

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 menu command **Hide by Attribute...** 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

The Find, Replace and Spelling windows contain a new button (**Reset**) that replaces the former **Cancel/Stop** button. Reset clears the existing search settings and restores them to the default. The keyboard command to close any of these windows is ESCAPE.

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...**

You can use **Find** to search among records when the record-entry window is open.

With **Find** you can search for records made or modified by a particular user.

When you use **Find** or **Replace** to search for locators within a specified range and your locators are multi-part references, you can omit from the search specification any part of the specification that is common to both parts. For example, you could enter the full range specification 23A66-23A69 as 23A66-69.

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

- 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.

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:

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- 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:

- 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.

Checking References

The former **Verify Cross-References...** command (renamed **Check References...**) has additional capabilities. With or without also verifying cross references you can now find entries that contain more than a specified number of page references. Cindex will display (in the form used to show bad or questionable cross-references) the entries that contain too many unqualified page references.

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.

Reconciling Headings

The **Reconcile Headings...** command has extended capabilities. 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

When you enter or edit abbreviations in the Abbreviations window, Cindex now provides unlimited undo and redo.

The top of the abbreviation window now contains a bar with column headers that control how abbreviations are sorted for display. You can view the display sorted by abbreviation or sorted by expansion: click the relevant header above the abbreviations or expanded phrases.