

Cindex 4.0 for Mac

This document explains how Cindex™ 4.0 for Mac differs from Cindex™ 3.0 for Mac.

You should read this document if you are upgrading from Cindex 3.0 for Mac. You need not read this document if you are a new user of Cindex.

Overview of Major New Features

General

There are many improvements in overall performance and reliability.

Index Checks

Cindex provides a powerful new tool for checking index entries. You choose which checks you want made, and Cindex provides a comprehensive report. The available checks fall into three broad groups covering:

- 1.** Errors within individual entries, including misused special characters, misplaced or questionable punctuation, unbalanced parentheses or quotes, letter case errors, etc.
- 2.** Inconsistencies across headings, such as style or typeface, punctuation, letter case, plurals, inconsistent leading or trailing prepositions or parenthetical endings, etc; also orphaned subheadings.
- 3.** Errors in cross-references and page references. Cindex reports missing or otherwise incorrect cross-references. It reports duplicate page references and overlapping ranges, and excessive numbers of undifferentiated page references. Checks on cross-references and page references extend those previously available.

Adding and Editing

You can now easily place a collection of disparate entries under a new common heading.

	<p>A new command helps you split complex headings into simpler components.</p> <p>Cindex provides finer control of font and style attributes when you drag or paste text into a record.</p> <p>Cindex provides improved capabilities for adjusting page references.</p>
Search and Replace	<p>When you search among records made or modified on particular date(s), Cindex now understands dates entered in a much wider variety of formats.</p> <p>You can now search and replace among records that <i>do not</i> carry specified style or font attributes.</p> <p>Cindex provides powerful new ready-made patterns for searching.</p> <p>When searching in draft view, Cindex now highlights the exact text found. Formerly it highlighted the whole record, which it still does when you work with the formatted view.</p>
Sorting Entries	<p>You can now sort specified text as if it were other text (e.g., St. as Saint).</p> <p>Cindex provides improved sorting of complex locators.</p>
Displaying and Printing	<p>Cindex can automatically suppress the display of redundant page references.</p> <p>There is a new formatting option for displaying headings and cross-references in title case.</p>
Export	<p>Cindex provides richer entity markup for formatted indexes exported as XML documents.</p>
Locked Documents	<p>Cindex now works with locked index documents. You can open and view, but cannot modify, the entries in a locked index.</p>

System Requirements

Cindex 4.0 requires macOS 10.9 or higher. It will not run on earlier versions of macOS.

Compatibility

Cindex 4.0 uses the same document format as Cindex 3, and works with documents created by Cindex 3.

Commands

New Commands

There three new commands:

- **Demote Headings** in the Edit menu.
- **Check Index...** in the Tools menu.
- **Split Headings...** in the Edit menu.

These commands, and an additional one, **Remove Mark**, in the contextual menu displayed when you right-click (or CONTROL click) in the main window, are described in more detail at relevant points in this document.

Commands Changed

The **Check References...** command has been superseded and replaced by the much more powerful **Check Index...** command.

The **Reconcile Headings...** command no longer provides the option to find orphaned subheadings. That option is now included in the new **Check Index...** command.

Toolbars

The toolbar in the main index window has been redesigned. Buttons for mutually exclusive settings are grouped together, and more clearly indicate which setting is active. A new toolbar button switches the display between sorted and unsorted order.

Preferences

A new setting **Paste and Drop Text** is available on the Editing tab when you chose **Preferences...** from the Cindex menu. This setting controls how Cindex deals with font and style attributes when you paste or drop text from an external document into a Cindex record. See the *User's Guide*, page 38.

Adding and Editing Records

Auto-Completion Cindex more accurately preserves text styles when auto-completing text in a new record.

Demoting Headings You will sometimes want to gather entries that have different headings, but are related, under a common main heading. The **Demote Headings** command (Edit menu) enables you to do this in a single step, without your needing to edit records individually. See the *User's Guide*, page 43.

Splitting Headings When you make an author index, you will often import several names in a single operation, e.g., by copying and pasting names from a list of references, or importing a list of references that contains names, possibly with additional text such as dates. The record heading that results then has to be edited to remove superfluous text, often requiring the generation of additional records, each for a single name. Cindex can do all this automatically for you, via **Split Headings...** in the Tools menu. For details see the *User's Guide*, page 95.

NOTE: **Split Headings...** was first available in Cindex version 3.6.3.

Pasting and Dropping Text Cindex provides finer control of font and typeface when you past or drop text into a record.

- When the text originates within Cindex (e.g., copying from one record to another), the pasted text normally keeps the style and font of the source. To discard only font information, hold down the OPTION key as you paste; to discard both style and font information hold down the SHIFT key.

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- When you paste text that originates outside Cindex (e.g., from a PDF document), the default behavior is to keep the style but not the font of the source text. You can change the default behavior through the Editing tab in **Preferences...** (Cindex menu). For information on this setting, and how to override the default behavior in individual cases, see the *User's Guide*, page 38.

Adjusting Page References

When using **Alter...** to adjust page references, if you provide a pattern to specify leading text that should be skipped, when Cindex encounters a page reference range it now applies the pattern intelligently to both parts. Formerly the pattern was applied only to the first part of the range.

Marked Records

Formerly, when a record was marked (indicating Cindex could not complete some operation on it) Cindex removed the mark only when you edited the record. You can now remove the mark manually, by selecting (highlighting) the relevant record(s) in the main view, then choosing **Remove Mark** from the contextual menu that appears when you right-click or CONTROL click in the window.

Search and Replace

General

Searching for and replacing text that contains specified style and font attributes is much more reliable.

Dates

When searching for records modified between specified dates, Cindex understands dates in a much wider variety of formats. Cindex interprets dates and times in the form appropriate to the country you are working in (e.g., month, day, year or day, month, year) and can accept dates and times in a wide variety of forms (e.g., Jan. 1 96, 1/1/96, 1 January 96, January 1 1996, today, 3:30pm). If you omit the year Cindex assumes the current year. If you omit the month, Cindex assumes the current month; if you omit the day (providing only a time), Cindex assumes today. If you leave the starting date blank, Cindex assumes January 1, 1970; if you omit an ending date, Cindex assumes a date far in the future.

If you enter a date in a format that Cindex cannot understand, it will warn you and highlight the text of the date.

Text Font and Style

You can now search for text that *does not* possess specified font and style attributes. Specify font and style by setting **Attributes...** in the Find or Replace panel.

Patterns

Cindex provides additional ready-made patterns for use in searching. Ready-made patterns are available through the contextual menu that Cindex displays when you right-click (or CONTROL click) in the search text box of the Find or Replace panel. Under the **General Patterns** submenu, there are new items for:

- **Text in Quotes** (finds text in quotes, excludes the quotes).
- **Text in Parentheses** (finds text in parentheses, excluding the parentheses).
- **Surname, Forename(s)** (finds proper names, in surname, forename format).
- **Forename(s) Surname** (finds proper names, in forename surname format).

Sorting Entries

Text Substitutions

A new **Sort...** option enables specified words or prefixes to words (e.g., “St.” or “Mc”) to be sorted as if they were other words or prefixes (e.g., “Saint” or “Mac”), without your having to provide text in {...} or <...> to override normal alphabetizing. You can also use this new capability to specify words that will be ignored altogether in alphabetizing. For more information see the *User’s Guide*, page 163.

Sorting Locators

When sorting locators that include text to be ignored (i.e., text in <...>), Cindex will now evaluate that text if it is the only thing that distinguishes the locators. (Formerly, Cindex ignored the text altogether.)

Formatting Entries

Title Case

When displaying entries in formatted view, Cindex can now format headings and cross-references in title case. This is available as a new option in the Style settings you make through the **Headings...** and **Cross References...** items in the Document menu. For information on the rules Cindex uses for capitalizing words in title case, see the *User’s Guide*, page 180.

Redundant References

A new setting available through **Page References...** (Document menu) controls how Cindex displays redundant page references in the formatted view. When **Merge Redundant References** is checked (the default setting), Cindex suppresses

duplicate page references and merges any overlapping ranges of references. For more information, see the *User's Guide*, page 143.

Exporting Formatted Entries

- Plain Text** When you save a formatted index as Plain Text, the default text encoding is now Unicode (formerly the default encoding used the Mac Roman character set). To specify the encoding choose **Preferences...** from the Edit menu, then click the **Export** tab.
- XML Tagged Text** When exporting a formatted index as an XML document, Cindex now provides an entity tag for the body text of an entry (i.e., the entry text before any page references or cross-references). See the *User's Guide*, page 193.
- Style Names** For export formats that define styles for different levels of heading (e.g., Rich Text Format, InDesign) you can now specify the names of the styles that Cindex will use identify different levels of heading. By default, Cindex behaves as in earlier versions, and takes style names from the names you have assigned to identify heading levels in records. For information on assigning style names, see the *User's Guide*, page 191.

Checking The Index

Cindex provides a rich set of tools for checking the correctness and consistency of index entries. The tools are group in three sets, accessible through tabs in the panel displayed when you choose **Check Index...** from the Tools menu:

1. Basic checks within individual entries, including misused special characters, misplaced or questionable punctuation, letter case errors.
2. Checks that compare heading content (at all levels above the locator field) in successive records, and flag records in which the differences between records are probably errors. These checks catch inconsistent style or punctuation, inconsistent letter case; inconsistent plurals; inconsistent prepositions, or parenthetical endings; also orphaned subheadings.

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3. Checks for errors in references, such as missing or otherwise incorrect cross-references; overlapping or excessive numbers of page references. Checks in this group extend those previously available through the **Check References...** command.

The **Check Index...** command is described fully in the *User's Guide*, page 219.