# CINDEX™ 4.0

# for Windows
# Publishers' Edition



# User's Guide Supplement

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E-mail: support@indexres.com        Voice: +1 585 413-1819

First Printing: April 2019

# *Cindex for Windows Publishers' Edition 4.0*

## INTRODUCTION

This document describes how the Publishers' Edition of Cindex™ for Windows differs from the standard edition. You should read this supplement in conjunction with the *User's Guide* to Cindex for Windows.

The Publishers' Edition differs from the standard edition in two principal ways: it provides additional features for the indexer and it provides some administrative services that make Cindex easier to manage in a networked environment.

### *Overview of Features*

The Publishers' Edition provides some general capabilities that are not available in the standard edition.

**Printing Labeled Records**

When printing an index Cindex can identify a labeled record with a bullet in the margin to the left of the column.

**Formatting**

When an index is formatted in indented style, you can force particular subheadings to be formatted in run-in style.

**Tagged Text Documents**

Markup tags that identify fonts can contain a placeholder that will cause Cindex to emit the font name in the tag.

**File Placement**

The Publishers' Edition provides a user (or the administrator) more control of the placement of files than is available in the standard edition. Users also have an additional

option in the File menu through which they can open only index templates and style sheets.

| | |
|---|---|
| **File-Sharing Capabilities** | Subject to the control of an administrator, multiple users can have the same index open at one time. The first user has unrestricted read-write access to the index; any subsequent user can have read access. |
| **Application Programming Interface** | The Publishers' Edition provides an application programming interface (API) that allows other programs running under Windows to execute certain Cindex commands and retrieve data from Cindex while it is running. |

## *Administrative Services*

An administrator can configure Cindex to require the user to enter an identifier before being allowed access to any documents; this identifier can be checked against a list of authorized users.

An administrator with suitable privileges can control where Cindex saves files and looks for files, and whether or not other users can change access settings.

The administrator can control whether or not a user can modify indexes or merely examine them, and can control whether or not multiple users can have concurrent access to a single index.

## SPECIAL FEATURES

## *Opening Stationery*

The File menu contains an **Open Stationery…** item through which you can display and open only style sheets and index templates. If you have specified a default folder that Cindex should use with style sheets and templates (see "File Placement" on page 3) Cindex will display the contents of that folder when it opens the dialog box.

## Printing Labeled Records

Cindex displays labeled records in distinctive colors. Colored text on the screen is often not distinctive when rendered by a printer. To make labeled records distinctive when they are printed, you can make Cindex print a bullet in the margin immediately to the left of the lowest-level heading that originates from a labeled record.

When you choose **Print…** from the File menu, check **Print Bullet Labeled Entry** to make Cindex print a bullet in the margin beside a labeled record.

## Formatting Entries

In an index that will be formatted in indented style, you can arrange that subheadings belonging to specified entries will be formatted in run-in style.

If any subheading in a record begins with a semicolon (;) Cindex will run-on that subheading from the heading above when it displays or prints entries in a fully-formatted view.

> **NOTE:** If you display or print an index in run-in style, Cindex will not make allowance for any subheadings that you have constructed with leading semicolons—it will display or print the semicolon in addition to any it would supply during its normal formatting of entries.

## Tagged Text Export

When you define a tag to represent the opening or closing of a font, if you include the symbol % in the tag, Cindex will emit the name of the font when it writes the tag to the file being saved. To use % as a literal character in a font tag, place a \ immediately before it.

> **NOTE:** Cindex treats \ as a literal character unless it is followed by a digit or %.
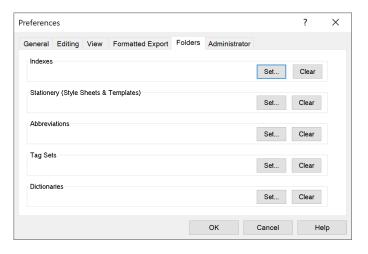
## File Placement

Depending on permissions granted by the administrator, you can specify folders that Cindex will use by default when it saves or opens certain kinds of documents.

You can specify:

- The folder Cindex will take you to when you create, open or save an index.
- The folder Cindex will take you to when you open a template or style sheet with the **Open Stationery** command (File menu) or save a style sheet with **Save Style Sheet** (File menu).
- The folder to which Cindex will take you to when you save sets of abbreviations you make.
- The folder in which Cindex will keep sets of markup tags.
- The folder in which Cindex will keep personal dictionaries that you use when you check spelling.

If no folders have been set for markup tags and user dictionaries, Cindex uses a private folder that is unique to each user.

To make or change any of default folder settings, choose **Preferences** from the Edit menu, then click the **Folders** tab (Figure 1).

**FIGURE 1.** Folders Preferences

Each box shows the path to the default folder for files of a particular type. If no path is shown no default folder has been specified.

To specify a default folder for a file of a particular type, click **Set…**. Cindex will display a standard file dialog box through which you can choose the folder you want to use.

> **NOTE:** You can set folders only if the administrator has configured Cindex to permit it. The **Set…** button for a particular file type will be dimmed if the administrator does not permit changes to default folders.

To clear a path already set, click **Clear**.

## Sharing Indexes

Subject to permissions granted by the administrator, the Publishers' Edition allows multiple users to have concurrent access to a single index.

The first user who opens an index has read-write access, and can freely make and modify entries. Any subsequent user who opens the index will have read-only access.

When you try to open an index that is already in use, Cindex will warn you of the fact and ask if you want to proceed. If you do open the index, Cindex will display **[Read Only]** beside the title to its main window.

> **NOTE:** The administrator can configure Cindex to prevent shared access to files.

### Limitations

When you have read-only access to an index, Cindex disables all menu commands that could modify entries. If the index is concurrently being modified by another indexer your view of entries is not guaranteed to be fully up-to-date.

## Application Programming Interface

The Application Programming Interface (API) allows another Windows program to execute Cindex commands. The API supports a subset of the commands normally available through Cindex menus. A specification for the interface is available to registered users of the Publishers' Edition.

# ADMINISTRATION

## *Cindex Administration*

When Cindex is first installed it allows all users unrestricted access to files and folders (subject to any broader restrictions imposed by Windows or your network). You can control who has access to Cindex and (to some extent) where Cindex seeks and saves files.

Establishing an
Administrator

To impose administrative restrictions on Cindex users, you must become an administrator. To do this, choose **Preferences** from the Edit menu, then click the **Administrator** tab (Figure 2).
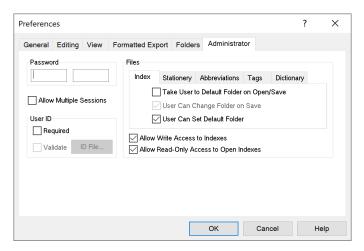


**FIGURE 2.** Administrator Preferences

Under **Password** enter (once in each text box) the password you will use to control subsequent access to the **Administrator** tab. The two entries must match before Cindex will accept them.

The password may contain up to 31 characters, or it may be empty. If you set no password, any user will have access to the **Administrator** tab.

> **NOTE:** If you use a password you should make a note of it. If you forget your password you will have no access to administrative settings

After an administrator password has been established, whenever you subsequently begin a session with Cindex it will prompt you for a user identifier and password. Password validation is case-sensitive.

**User Authentication**

The standard edition of Cindex allows an indexer to supply an (optional) user identifier that Cindex attaches to a record whenever that record is added or edited. The Publishers' Edition allows the administrator to *require* a user to provide an identifier, and can authenticate this identifier against a list kept in a file. Settings that control user authentication are in the **User ID** box on the **Administrator** tab (Figure 2).

Check **Required** to make Cindex require a user ID before allowing access.

Check **Validate** to make Cindex check that the user ID is valid. If this is checked Cindex validates the ID against a list kept in a validation file. User ID validation is case-insensitive. Click **ID File…** to specify the path to the file that contains the list of authorized users. If **Validate** is unchecked, Cindex will accept any identifier the user enters.

If **Validate** is checked and no validation file is specified (or the specified file does not exist), Cindex accepts identifiers without checking their authenticity.

**Validation File**

The validation file can reside anywhere on your network. Cindex requires read access to the file. The file may have any name but must have the filename extension .usr. Each entry in the file must be on a single line terminated by a carriage-return, line-feed combination. The entry must begin with (up to four) characters that identify the user. Cindex disregards letter case when checking letters in an identifier.

An ID terminated by a semicolon can be followed optionally be a comment. The following entries in the validation file are therefore both acceptable:

DXML
DXML;  David Light

Logon

When Cindex is configured to require a user identifier *or* if you have set up an administrative password, it displays a dialog box when it starts (Figure 3).
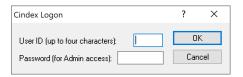
**FIGURE 3.** Cindex Logon

A user must provide an identifier before Cindex will permit access. If validation has been enabled, access will be allowed only if the identifier matches an entry in the validation file.

A password is required only for administrative access. If you provide a password that matches one previously entered, Cindex will display the **Administrator** tab when you choose **Preferences** from the Edit menu; if your password does not match, the **Administrator** tab is not displayed.

The password and user ID are not linked: Cindex does not check that the user ID and password belong to each other.

Multiple Sessions

Cindex is normally configured so that only one instance can be active at any one time on a single computer. The administrator can specify whether or not multiple instances of Cindex can run concurrently on a single computer. To enable multiple instances, check **Allow Multiple Sessions**.

## *File Placement*

The administrator can specify what rights other users have to change folders via the **Folders** tab in **Preferences** (Figure 1).

Depending on the file type, the administrator can specify:

• Whether or not a user is taken to a default folder for Open/Save operations.

- Whether or not the user can move out of the folder initially opened by the **Save As…** dialog box.
- Whether or not the user can specify a default folder.

To inspect or change access settings, choose **Preferences** (Edit menu) then click the **Administrator** tab (Figure 2). Under **Files** there is a tab for each file type for which settings can be made. Not all options are available for all file types.

**Taking the User to a Default Folder**

When Cindex displays a file dialog box (**New… Open… Save As…**) it can take the user to the specified folder for the file type (specified via the **Folders** tab), or it can take the user to the last folder used for a file operation.

To make Cindex take the user to the specified folder, check **Take User to Default Folder on Open/Save**. To make Cindex take the user to the last-used folder, uncheck **Take User to Default Folder on Open/Save**.

> NOTE: When you open a file via **Open**…, Cindex will always take you to the default folder for indexes. If you choose (from the drop-down list in the **Open** dialog box) a style sheet or abbreviation set, Cindex does not change the folder. When you save style sheet or set of abbreviations, Cindex will take you to the default folder for that file type (if **Move to Default Folder on Open/Save** is checked).

> You cannot set **Take User to Default Folder on Open/Save** for tag sets and user dictionaries. Cindex always uses the default folder when working with these kinds of files.

**Moving Through Folders**

When Cindex saves files of the specified type, and presents the user with the **Save As…** dialog box, the user can normally change the folder before saving the file. You can set Cindex so that if the user is taken to a *default* folder (specified through the **Folders** tab in **Preferences**), the user must use that folder when saving files of the specified type.

To prevent users changing the folder in which the file will be saved, uncheck **User Can Change Folder on Save**.

To permit users to change the folder in which the file will be saved, check **User Can Change Folder on Save**.

> **NOTE:** You can make this setting only if **Take User to Default Folder on Open/Save** is checked. If **Take User to Default Folder on Open/Save** is unchecked, or no default folder has been specified, **User Can Change Folder on Save** is always checked**.

**User Control of Default Folders**

The administrator can specify whether or not users can change (via the **Folders** tab under **Preferences**) the default folders for files of specified types. The administrator always has unrestricted rights to change default folders.

To permit a user to change the default folder, check **User Can Set Default Folder.**

To prevent a user changing the default folder, uncheck **User Can Set Default Folder.** When this is unchecked the corresponding **Set…** button on the **Folders** tab is dimmed.

## *Access to Indexes*

The administrator can control whether or not a user can create and modify indexes, and whether or not a user can have read-only access to an index that has already been opened by someone else.

**Write Access to Indexes**

To permit a user freely to make and modify indexes, check **Allow Write Access to Indexes**. To prevent a user creating or modifying indexes (while permitting read-only access to existing indexes) uncheck **Allow Write Access to Indexes**. This item is checked when Cindex is first installed.

**Shared Access to Open Indexes**

To allow a user read-only access to an index that is already open, check **Allow Read-Only Access to Open Indexes**. When this is checked, users have access as described in "Sharing Indexes" on page 5. When this is unchecked, a user attempting to open an already open index will be warned and denied access. This item is checked when Cindex is first installed.