

XEROX

Xerox ViewPoint

VP Long Document Options Training

VP Long Document Options Training

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1.

Getting started

Xerox ViewPoint Long Document Options is an optional software application for the 6085 Professional Computer System and 8010 Information System. Using VP Long Document Options, you can automatically generate footnotes, an index, or a table of contents for a VP document or book, and you can manage the creation of a single book by more than one author.

When you finish this training guide, you will be able to do the following:

- Create footnotes, automatically number them, and control their attributes and placement.
- Create and modify a multi-level index.
- Create and modify a table of contents.
- Generate an index and a table of contents for a book.
- Create and use a shared book

This training guide assumes that you have completed the *ViewPoint QuickStart* and the *VP Document Editor: Document Creation* training guides. If you have not yet worked through those guides, complete them now before continuing with this guide.

Training guide exercises

This training guide provides exercises that illustrate typical ways of working with VP Long Document Options software. In these exercises, you begin with a nine-page sample text and create footnotes, an index, and a table of contents for the text.

After you perform applications of VP Long Document Options on a document, you repeat them on a book containing more than one document, including the original sample. Finally, you use the same samples in a shared book, learning how to effectively collaborate with others in writing a single work being written or revised by you and other users on network-linked workstations.

The same training sample continues through the entire VP Long Document Options training. The actions you take on that sample are cumulative, and the sample enlarges as the various applications are applied to it. This training mimics the procedures you are most likely to use when completing your own long documents.

For complete information on VP Long Document Options, refer to the *Document Editor Options Reference* volume of the *VP Series Reference Library*.

Hardware and software you need to begin training

Before you begin your training, make sure you have the following hardware and software:

- An operating 6085 or 8010 workstation with a desktop, a fully qualified user name, and a password. If you have a 6085 or 8010 workstation that is part of a network, you can get help from your system administrator. If your workstation is a StandAlone or Documenter, you can get help from the *Workstation Administration and System Resources Reference* volume.
- Default User Profile settings. The User Profile lists the settings that control your desktop. The procedures in this training guide are designed for desktops using the default User Profile settings. Check with your system administrator to make sure your desktop has the default User Profile settings, or refer to the *General User Reference* volume.

Check the status of your applications before you begin training; consult with your system administrator or follow the next procedure.

Checking the status of applications



1. **Open** the Directory icon.
2. **Open** the Workstation divider.
3. **Open** the Loader.
4. **Compare** the list of applications in the Loader window with the application listed here.

- VP Document Editor

You also need one or more of the following applications, depending on which you will be using:

- Footnotes
- Index Generator
- Table of Contents Generator
- Shared Books

Additional applications may also be running.

If the Loader lists the applications you need and their STATUS column is set to RUNNING, select [Close All] in the Loader window header.

If the applications you need are not listed in the Loader, consult your system administrator or refer to the *General User Reference* volume for information on installing applications.

If the applications you need are listed, but the STATUS column is set to IDLE, change the status of the applications as described next.

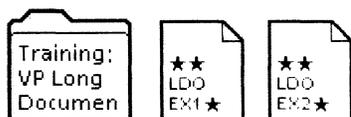
Running applications

If the STATUS column of an application you need is set to IDLE, it must be changed to RUNNING.

1. **Select** the application.
2. **Select** [Run] in the Loader window header.
3. **Select** [Close All] in the Loader window header when you are finished setting applications to RUNNING.

You can also set applications to run automatically; refer to the *General User Reference* volume for this procedure.

Training exercise documents



To assist you in completing the training exercises, a training folder named "Training: VP Long Document Options" accompanies this training guide. This folder is located on the floppy disk titled "VP Training Exercises."

If the training folder and exercise documents are not already on your desktop, copy them there now. If you need help, refer to the following procedures.

Copying the training folder to the desktop

1. **Insert** the "VP Training Exercises" disk in the floppy disk drive, and **close** the door.
2. **Open** the Floppy Drive icon.



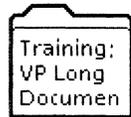
The Floppy Drive window lists the contents of the floppy disk.

If you do not have a Floppy Drive icon on your desktop, refer to the *General User Reference* volume for the procedure to copy the icon, or ask your system administrator.

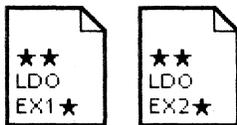
3. **Select** the “Training: VP Long Document Options” folder, and **press** <COPY>.
4. **Select** a location on the desktop.
5. **Select** [Close] from the Floppy Drive window header.
6. **Remove** the floppy disk from the floppy disk drive, and **put** it in a safe location.

Copying the exercise documents to the desktop

Do not work with the exercise documents inside the training folder. Copy the exercise documents to the desktop.



1. **Open** “Training: Long Document Options,” and **select** the documents in the folder.
2. **Press** <COPY>, and **select** a location on the desktop.
3. **Select**[Close] from the “Training: VP Long Document Options” folder window.



The exercise documents are now on the desktop.

Two final notes before you begin:

- This training guide uses underlining to indicate information that you type; however, you do not need to underline the information you type.
- As you use this training guide, you will see terms in ***bold italic*** type. You can find more information on these terms in the Glossary, which is located in the *Quickfind Reference* volume.

You are now ready to start training.

2.

Creating footnotes

The footnotes feature in VP Long Document Options helps you to automate the process of footnote creation, management, and printing. You can number (or sequence) the footnotes automatically, and you can automatically resequence them to accommodate insertions of new footnotes or deletions of old ones.

You can have the footnotes printed at the bottom of the page or at the end of the document (technically, called *endnotes*). You determine what reference marks are used to indicate the footnotes, how they will look, and whether the sequences begin again on each page or continue through the length of the document.

Inserting footnotes into text

You now insert a footnote into a sample text. Footnotes can either be created during the writing of a document or after the document has been written.

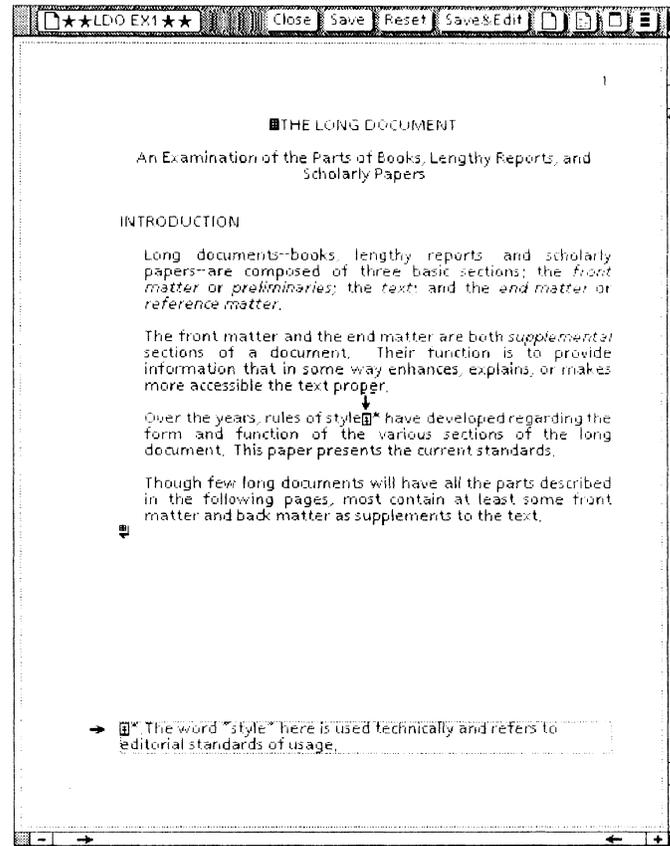
Examining the sample text

1. Open ★★LDO EX1★★.
2. Select [Show Structure] in the document auxiliary menu.



3. Examine ★★LDO EX1★★.

This is the primary text sample you will be using throughout the VP Long Document Options training. The following illustration shows page 1 of ★★LDO EX1★★.



Notice that there is already a footnote on the screen page. When you select [Show Structure], you can see the *footnote reference character* after the word "style" in the text, and again at the bottom of the page with an associated text frame.

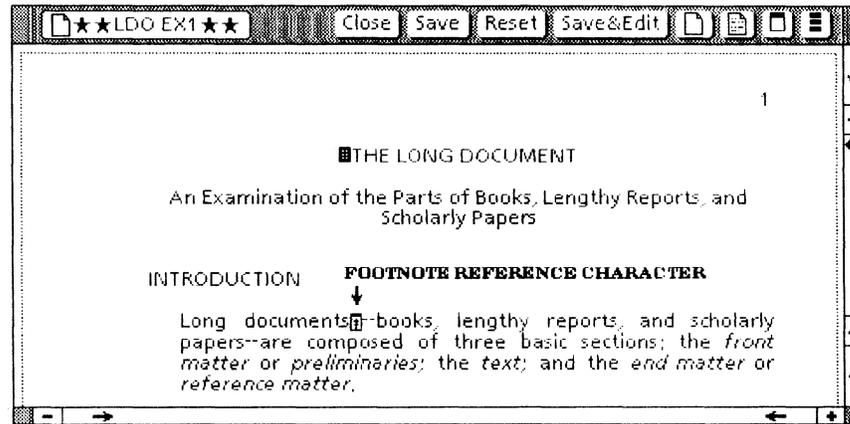
There is an asterisk immediately to the right of the footnote reference character in the sample. A variety of reference character symbols are available in the footnotes feature. The asterisk, dagger, etc. sequence has been preset in this sample.

Notice the first sentence in the text, and the secondary phrase in that sentence: "--books, lengthy reports, and scholarly papers--." In the next section you convert that phrase into a footnote.

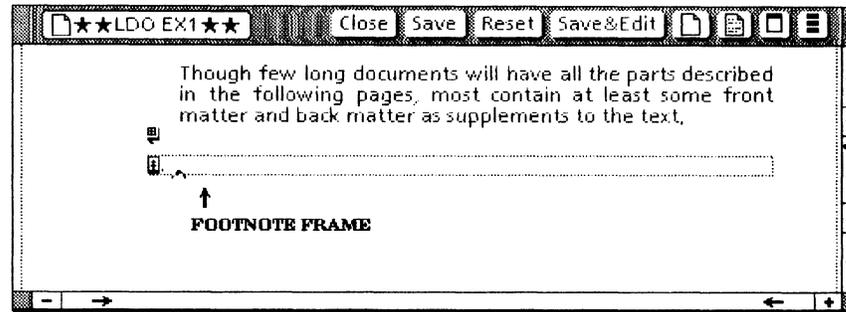
Inserting a footnote

1. **Select** [Edit].
2. **Select** the letter "s" in the word "documents" in the first sentence of the text (as shown in the illustration below).
3. **Press** <KEYBOARD>, <SPECIAL>, and .

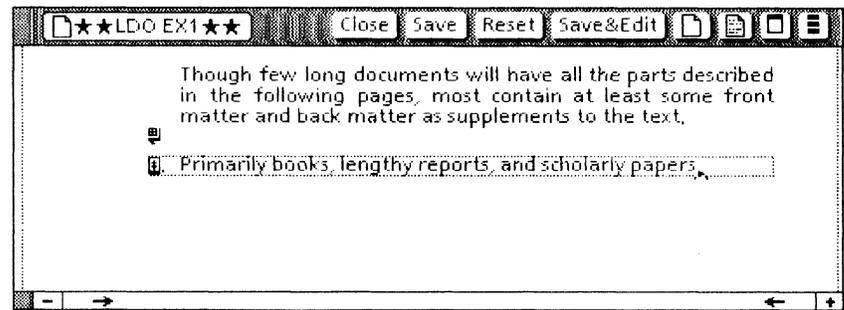
A footnote reference character is inserted at the selected location in the text. The message area reads "Inserting Footnote... Done."



Notice the flashing cursor in the newly created footnote frame, lower on the page.



4. **Type:** Primarily books, lengthy reports, and scholarly papers.



You have now created a footnote. The character and placement properties of the footnote reference and the footnote text body were determined by the preset Footnote Options sheet.

5. **Press** <NEXT>.

This brings the cursor back to the text at the position immediately after the inserted footnote reference character.

6. **Delete** from the first sentence of the text the phrase "-- books, lengthy reports, and scholarly papers--," and **add** a blank space.

The secondary matter in the first sentence of the text is now set as a footnote.

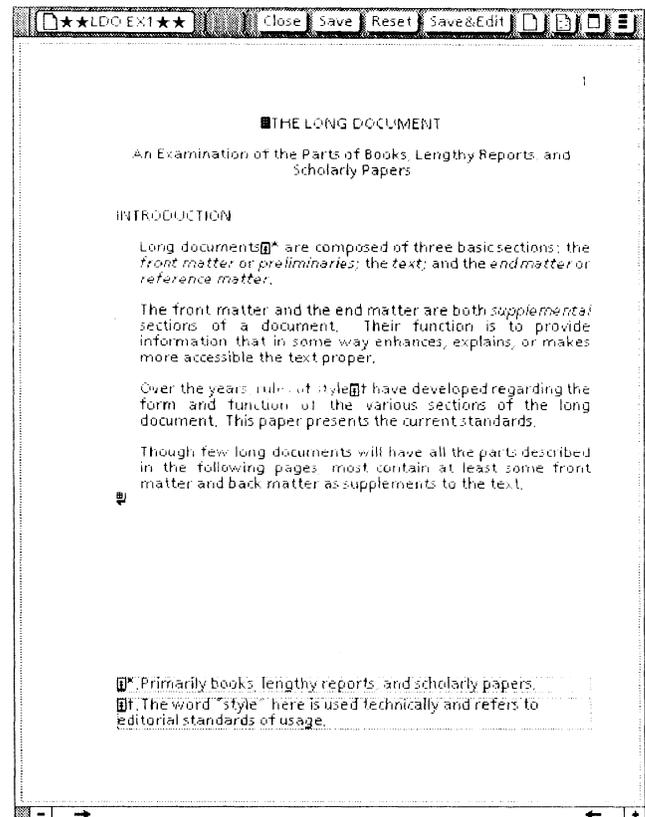
Sequencing the footnotes

Footnotes are automatically sequenced when a document is paginated. The sequencing properties are determined in the Footnote Options sheet.

1. **Select** [Paginate Displayed Pages] from the document auxiliary menu.

Any of the pagination options would work for this instance, but [Paginate Displayed Pages] is the fastest.

Notice, after pagination, that the first symbol, the asterisk, is now assigned to the new footnote entry. A dagger has been assigned to the second footnote, "style."



Modifying footnote options

A variety of footnote placement, sequencing, and character format options are available to you. In the first exercise, you used the default options for everything except the reference symbol sequence.

Ordinarily, you should select the desired footnote options before you begin inserting footnotes, since only the numbering and placement options can be used to change previously created footnotes.

Using the Footnote Options sheet

You select the desired footnote properties in the Footnote Options sheet. The Footnote Options sheet is divided into three sections: numbering and placement, reference creation, and body creation.

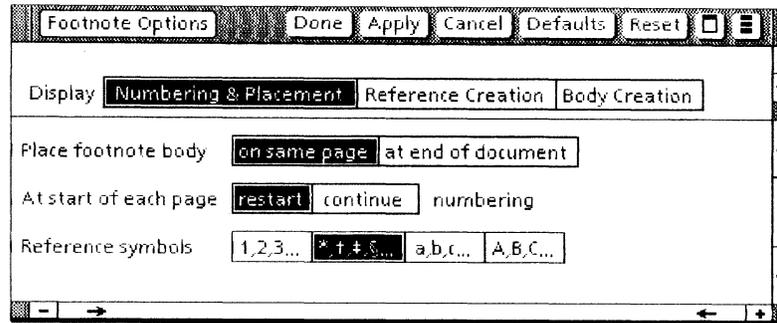
Using numbering and placement options

The numbering and placement options control the type of reference symbols used, how the sequencing is to proceed, and whether the notes are to be set on the same page or at the end of the document.

Numbering and placement options are implemented during pagination of the document.

1. **Select** [Show Footnote Options] in the document auxiliary menu.
2. **Select** [Numbering & Placement] (if not already selected).

The footnote numbering and placement options are displayed, as shown on the following page.



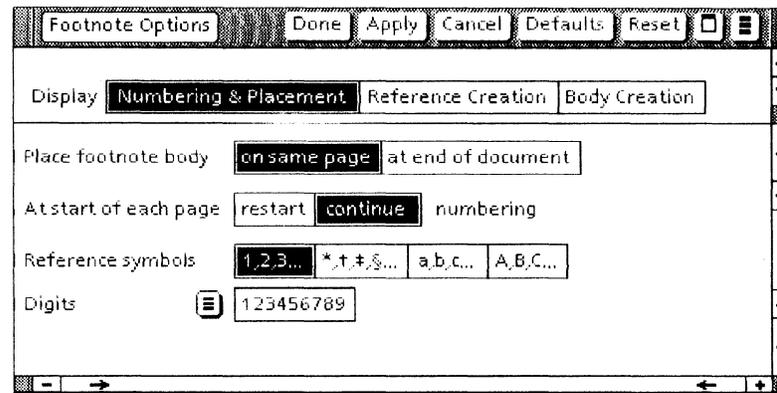
Notice that the At start of each page option is set to [restart] and that the Reference symbols option is set to the asterisk-dagger sequence. These were preset in the sample. The default settings are [continue] and [1, 2, 3...].

3. Select [1, 2, 3...].

This will replace the symbols with numbers.

4. Select [continue].

This will cause the numbering sequence to continue over page boundaries.

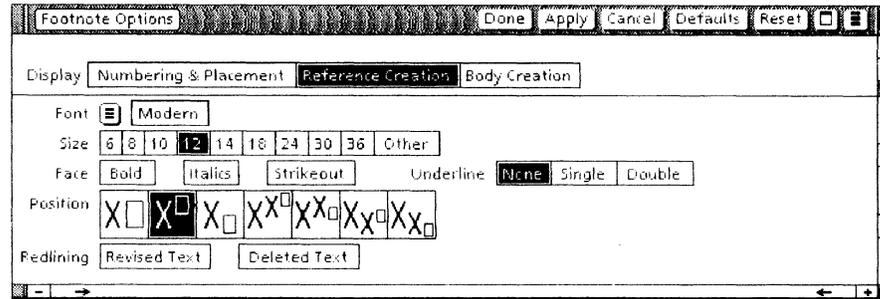


The numbering and placement options have been chosen but will not be activated until the next pagination.

The reference creation and body creation properties will not be altered in this section of the training, but view those option sheets now to gain an understanding of the options.

Viewing the reference creation options

1. Select [Reference Creation].

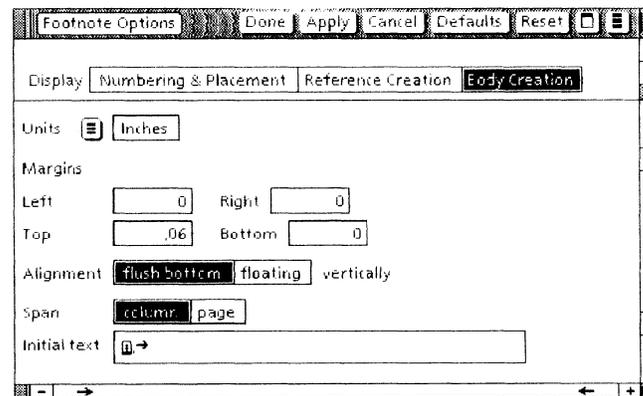


The reference creation options control the appearance of the footnote symbol. Reference creation options are implemented during footnote creation. They cannot be altered later by means of the Footnote Options sheet.

For this sample, you use the default reference creation properties, as shown.

Viewing body creation options

1. Select [Body Creation].



The body creation options determine the properties of the reference body: the text included in the footnote frame, and the positioning of that frame. Body creation options are implemented during footnote creation and cannot be altered later by means of the Footnote Options sheet.

For this sample, you use the default body creation properties, as shown.

Applying the numbering and placement options

The only footnotes options you altered were numbering and placement. These alterations will be implemented in the next pagination.

1. Select [Done].

It is not necessary to return to the numbering and placement options first.

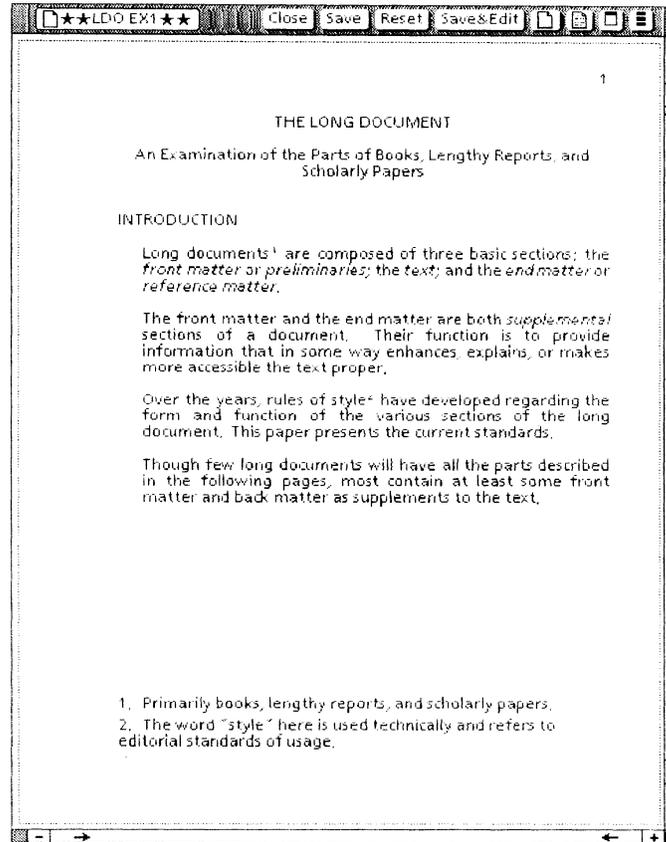
2. Select [Simple Paginate] in the document auxiliary menu.

You may select either [Simple Paginate] or [Paginate]. When the pagination is completed, the correctly numbered reference symbols appear in both the text and footnotes.

3. Select [Don't Show Structure] in the document auxiliary menu.

This allows you to see the document essentially as it will look when printed.

The illustration on the following page shows the sample as it now appears.



4. **Examine** the placement and numbering of the footnotes.
5. **Scroll** to page 2, and **examine** the footnote on that page.
It has correctly been numbered 3, in sequence.
6. **Select** [Close].

Save the working version of ★★LDO EX1★★. You will continue to use it in chapter 3.

For more information on how to use footnotes, refer to the *Document Editor Options Reference* volume.

Creating endnotes: optional training



The following optional training shows you how to create chapter endnotes with VP Long Document Options. Additionally, it shows you how to change the properties of already existing footnotes.

Since this section is optional and the changes made to the sample are not used in the next chapters of this training guide, you use a new copy of the original training sample, and then delete it or put it to one side before continuing with the training.

Creating the optional sample

1. **Copy** a new ★★LDO EX1★★ to the desktop from the Training: Long Document Options folder.

This is a separate exercise from the one just completed, and the sample should be given a different name.



2. **Rename** the sample Endnotes Sample.

Setting the endnotes option

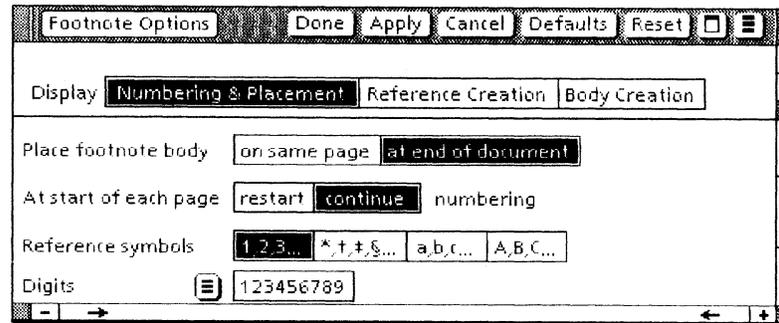
1. **Open** Endnotes Sample, **select** [Edit], and **select** [Show Structure].

Previously, you used preset footnote properties. Now you set new properties.

2. **Select** [Show Footnote Options] in the document auxiliary menu.
3. **Select** [Numbering & Placement].
4. **Select** [at end of document].

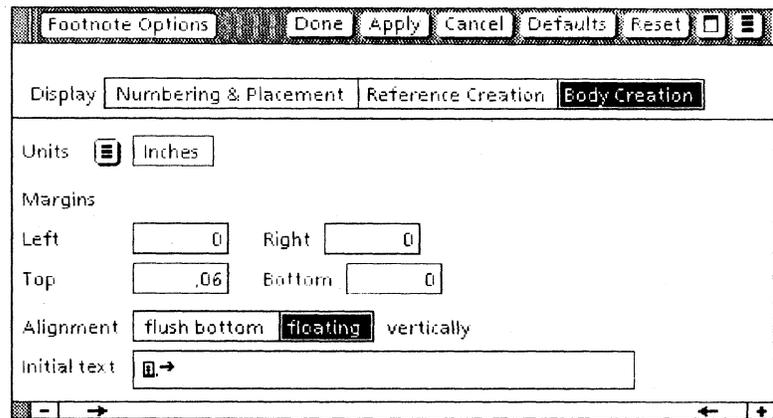
5. Select [continue].

6. Select [1, 2, 3...].



7. Select [Body Creation].

8. Select [floating].

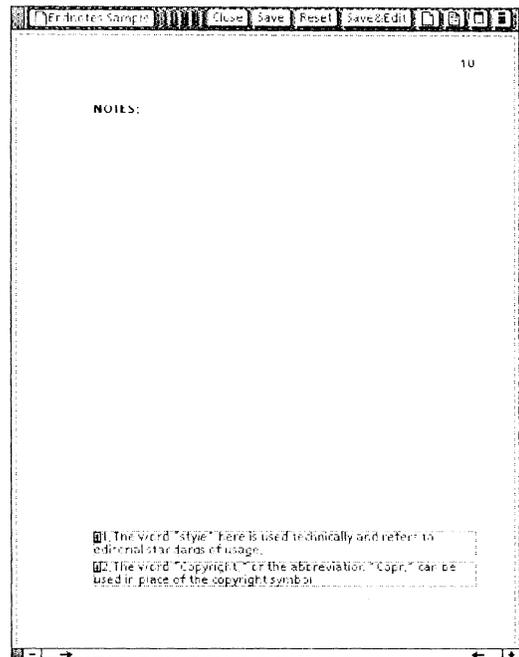


The [flush bottom] option forces the notes to the bottom of the page. The [floating] options allows the notes to rise to the first available space on the page.

9. Select [Done].

Inserting the page break

1. **Scroll** to page 9, and **select** after the blank space immediately following the final word, "proper."
2. **Press** <KEYBOARD>, <SPECIAL>, and <2>.
This inserts the page break character.
3. **Press** <RETURN> twice.
4. **Press** <F2> (<BOLD>).
5. **Type:** NOTES: and **press** <RETURN> twice. (Remember to type the colon after NOTES.)
6. **Select** [Simple Paginate] in the document auxiliary menu.
After pagination, a new endnotes page appears.
7. **Scroll** to page 10, and **examine** it.

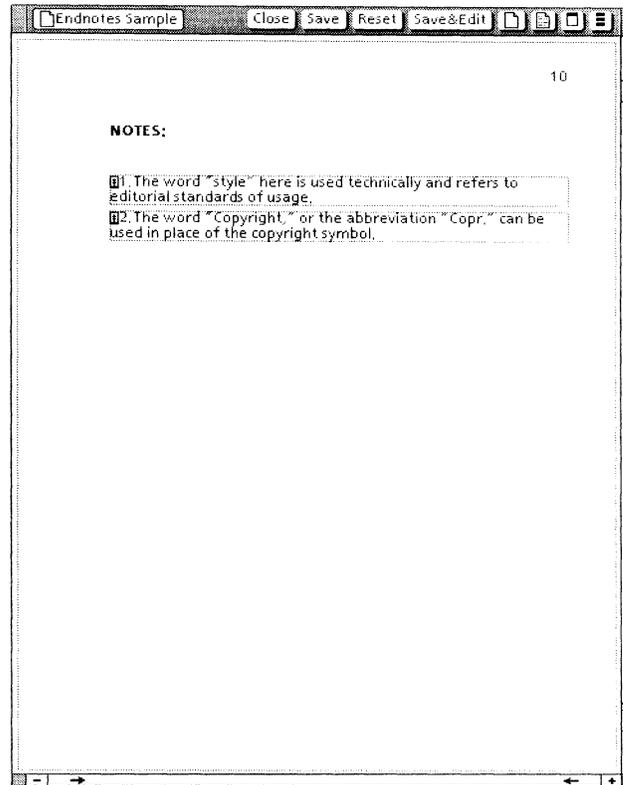


Page 10 has been added to the sample document as a separate page for endnotes. Notice, however, that the endnotes are flush bottom, even though you chose [floating] in the Footnote Options sheet. This is because footnote body creation properties are implemented when a footnote is created, not when it is paginated.

Changing body creation properties for already existing footnotes

1. **Select** the top footnote frame.
2. **Press** <PROP'S>.
3. **Select** [floating].
4. **Select** [Done].
5. **Repeat** the same procedure for the bottom footnote frame, number 2.
6. **Select** [Simple Paginate] in the document auxiliary menu.

After pagination, the endnotes page appears as shown on the following page.



Creating a new endnote

Now you create a new endnote.

1. **Scroll** to page 1.
2. **Select** the letter "s" in the word "documents" in the first sentence of the text.
3. **Press** <KEYBOARD>, <SPECIAL>, and .

After the message, "Inserting Footnote... Done." appears, the footnote frame at the bottom of the screen page is ready for the notation.

4. **Type:** Primarily and **move** "books, lengthy reports, and scholarly papers" from the text to the footnote frame.
5. **Type** a period.

6. **Press** <NEXT>.

7. **Delete** the four hyphens from the text, and **add** a blank space.

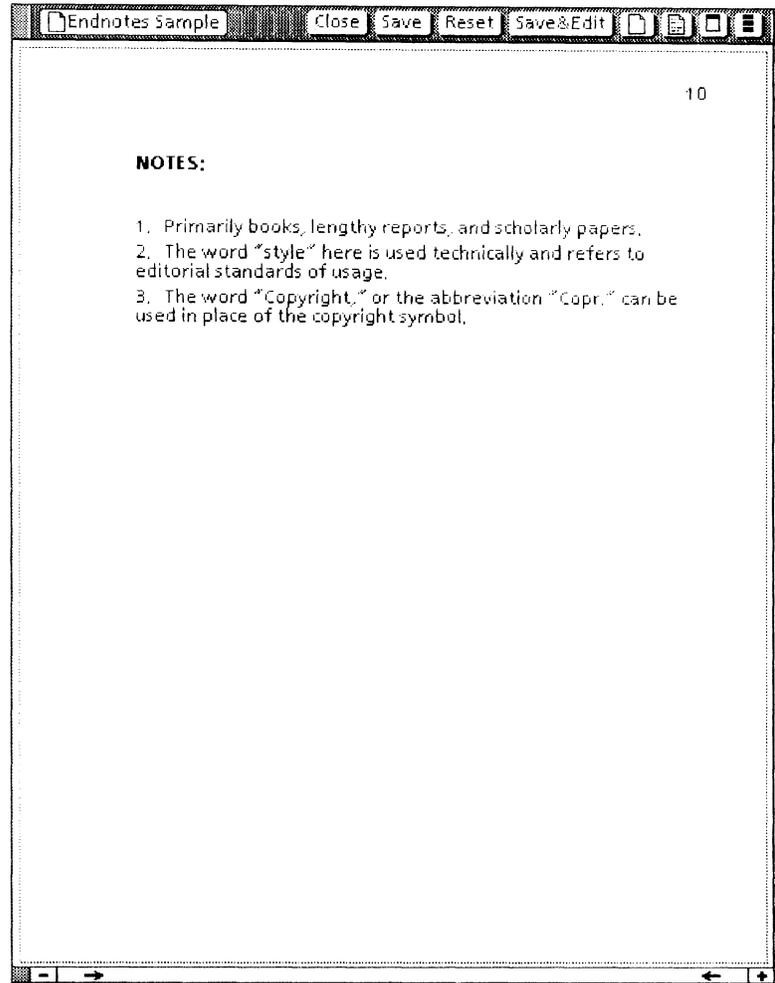
So far, this is the same action you performed earlier in this chapter. You now generate the sequencing using the new footnote options you selected.

8. **Select** [Simple Paginate] in the document auxiliary menu.

After the pagination is completed, examine the text.

9. **Scroll** to page 10, and **select** [Don't Show Structure].

The illustration is on the following page.



As you see, the new footnote body has floated to the proper position. The endnote creation process is now completed.

10. Close Endnotes Sample.

For more information on using endnotes, refer to the *Document Editor Options Reference volume*.

3.

Creating an index

The VP Long Document Options Index Generator extracts index entries from text, and then it compiles and orders these entries to form an index.

The Index Generator is a powerful and complex tool, allowing you to tailor it to meet your special requirements. The ordering and combination of Index Generator procedures taught through this training will give you a solid understanding of how to generate indexes.

You will be using the continuing sample document from the footnotes training. If you have skipped the footnotes training, you can still use the Index Generator training by copying **★★LDO EX1★★** from the training disk to your desktop at this time. Note, however, that your indexes may vary slightly from the illustrations in this chapter.

This training introduces you to essential features of the Index Generator, but it does not exhaust the possibilities. For further information, refer to the *Document Editor Options Reference* volume.

Creating indexes through the screening dictionaries

The most fully automated method for using the Index Generator involves using one or more screening dictionaries. These dictionaries extract words from the text: either words *not* to be listed in an index (the *exclusion dictionaries*), or words that *are* to be listed (the *inclusion dictionaries*).

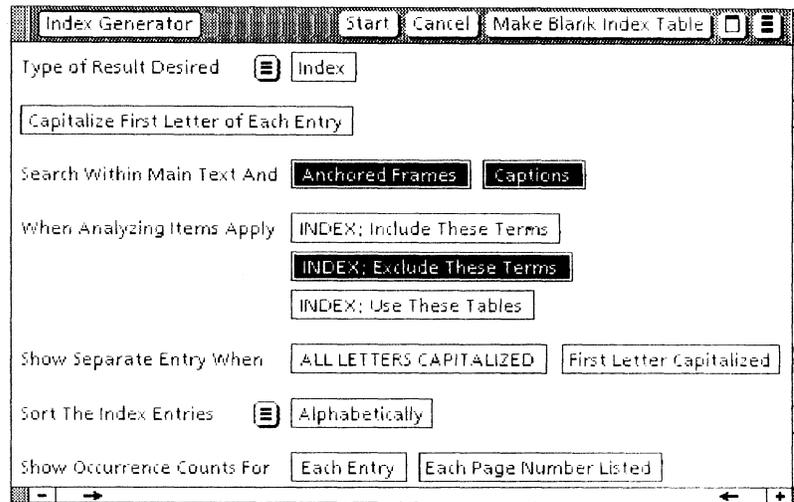
After you have completed the screening process for a given document or book, you can use the same screens to generate new indexes reflecting changes to the text. You choose the screens, select the document to be indexed, and initiate index generation. The system automatically generates the index.

Creating the default (exclusion) index

You bring three default folders and one default document to your desktop through this training. In order to do that, you must check to see that none of these icons is already on your desktop. Make sure the following folders and document are *not* on your desktop as you begin this training: INDEX: Exclude These Terms; INDEX: Include These Terms; INDEX: Use These Tables; and INDEX: Layout Guide.

1. Select [Index Generator] in the desktop auxiliary menu.

This brings the Index Generator option sheet to the screen, as illustrated on the following page.



The options selected in the Index Generator option sheet determine the creation process for an index, or indexes. The Index Generator option sheet is brought to your screen with its default values, as shown.



2. Select (highlight) ★★LDO EX1★★.

This will be the subject document for the index generation.

3. Select [Start] in the Index Generator option sheet.

This initiates the index generation procedure in default mode. In the default mode, text is analyzed using the screening dictionaries contained in the INDEX: Exclude These Terms folder.

A number of icons need to be brought to the desktop. A message appears for each icon the Index Generator does not find on your desktop. For the first, the following message appears in your desktop message area:

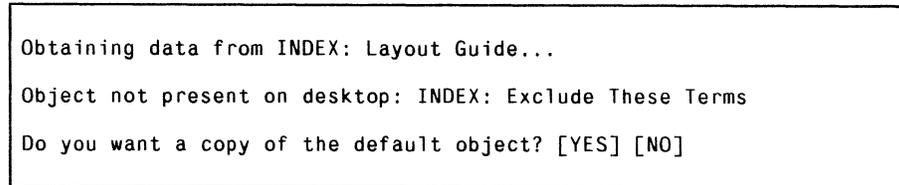
```
Initializing...
Object not present on desktop: INDEX: Layout Guide
Do you want a copy of the default object? [YES] [NO]
```

4. Select [YES].

In a moment, the INDEX: Layout guide is brought to the desktop.



The NEXT message appears in your desktop message area:



5. Select [YES].



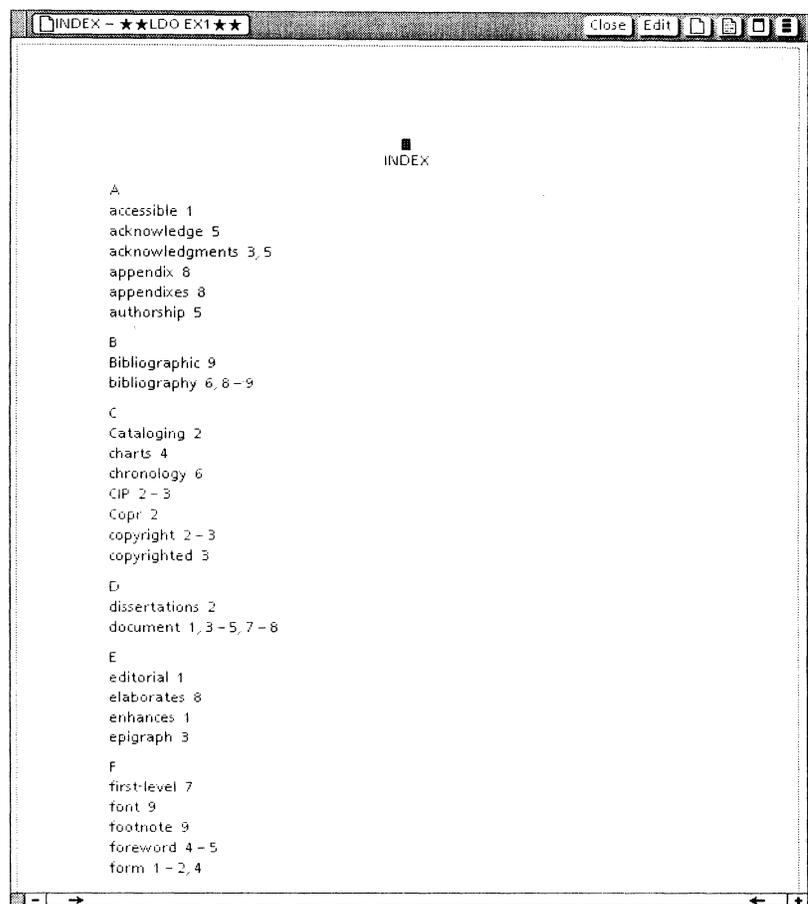
The INDEX: Exclude These Terms folder is brought to the desktop. This folder contains three exclusion dictionaries. Later in the training you create your own exclusion dictionary and add it to the folder.

The index generation procedure continues, operating as a background activity. When it is completed, the document INDEX - ★★LDO EX1★★ appears on your desktop.



6. Open INDEX - ★★LDO EX1★★.

7. Examine INDEX - ★★LDO EX1★★.



Some words in the index are appropriate. Others are not. This is the starting point in your index creation. For the remainder of this chapter, you refine the index generation.

The index can be edited just like any ViewPoint document. This procedure would be satisfactory for creating a final index, if you were sure that there would be no revisions made to the text. By modifying the index generation *process*, rather than the index directly, you create a means for easily generating new indexes for future versions of the document.

Storing the index version



1. **Copy** a Blank Folder icon to the desktop.
2. **Rename** the folder "INDEX VERSIONS."

By storing indexes as you create new versions, you avoid confusion, keeping only the most recently generated index on your desktop. The stored versions provide a record of how your indexes have progressed. Note, however, that if your system is low on disk pages, you may delete prior index versions rather than storing them.

Creating new index exclusions

There are a variety of ways to use the Index Generator to further modify the subsequent index:

- By using an additional or modified exclusion dictionary or dictionaries
- By creating and using an *inclusion* dictionary or dictionaries
- By using index tables
- By marking individual text
- By using combinations of exclusion dictionaries, inclusion dictionaries, index tables, and marked text

You are introduced to all of these features in this training.

Creating the list of exclusions

First, you create a document containing all the words from the first index that you want excluded from subsequent indexes.

1. **Copy** a Blank Document icon to the desktop.

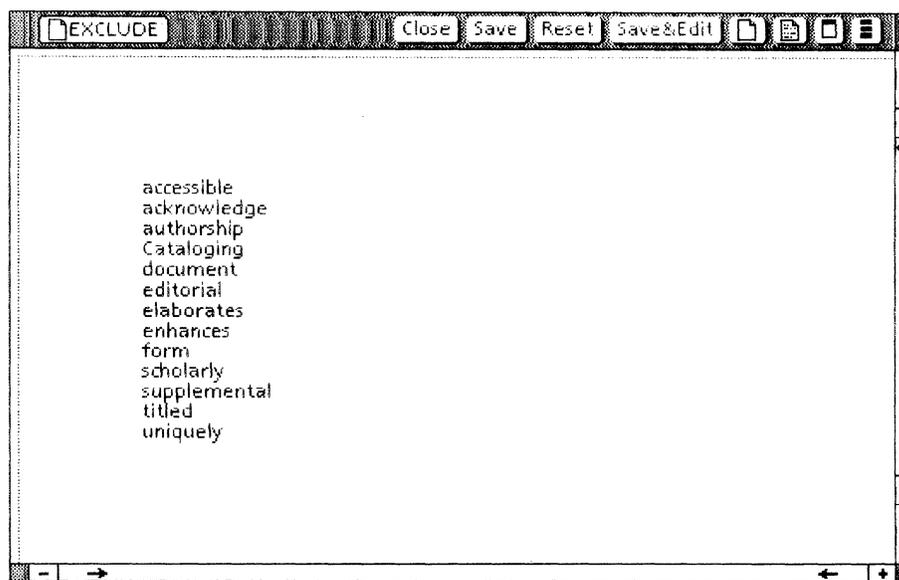


2. **Rename** the blank document "EXCLUDE."
3. **Open** the EXCLUDE document, and **select** [Edit].

Some words, such as "accessible" and "acknowledge," should be removed from the index. Others, including "acknowledgments," "appendix," "appendixes," "bibliographic," and "bibliography," should be retained.

4. **Position** the two open documents so that both can be viewed simultaneously on your desktop.
5. **Copy** "accessible" from INDEX - ★★LDO EX1★★ to EXCLUDE, and **press** <RETURN>.
6. **Copy** the other words, one at a time, from INDEX - ★★LDO EX1★★ to EXCLUDE what you *don't* want in subsequent indexes, and **press** <RETURN> after each.

The completed list of exclusions appears below.

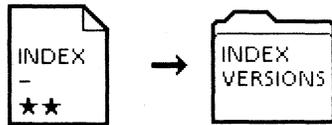


Once the list has been completed, it must be converted into a dictionary in order to operate as a screen in index generation. Note that the list need not be alphabetical.

7. **Close** EXCLUDE.

8. Close INDEX - ★★LDO EX1★★.

Since you will be creating a series of indexes in this chapter, each having the same name (INDEX - ★★LDO EX1★★), you may want to create a folder to store old version as you create improved ones.

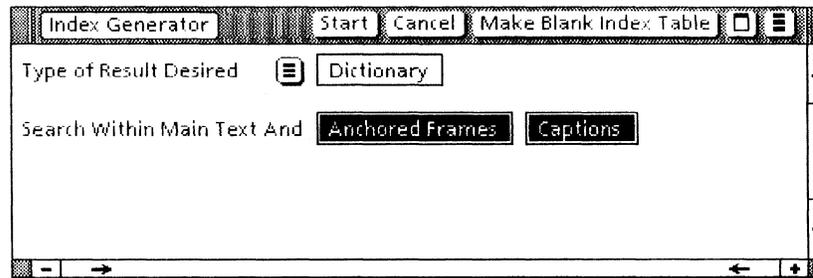


9. Move INDEX - ★★LDO EX1★★ to INDEX VERSIONS.

You may want to review the indexes later. Note, however, that you may delete the index from your desktop if you need the disk pages.

Changing the document into a dictionary

1. Select [Index Generator] in the desktop auxiliary menu.
2. Select [Dictionary] for "Type of Result Desired."



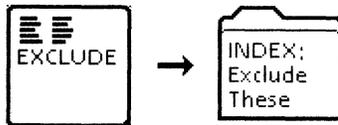
3. Select (highlight) EXCLUDE.



4. Select [Start].

In a moment, the dictionary appears on your desktop.





Generating the new index

1. **Move** the EXCLUDE dictionary to the folder titled INDEX: Exclude These Terms.

Be sure you move the EXCLUDE *dictionary*, not the EXCLUDE *document*.

2. **Select** [Index Generator] in the desktop auxiliary menu.

3. **Select** [Capitalize First Letter of Each Entry].

This will normally capitalize the first letter of each first-level index entry generated from an inclusion or exclusion dictionary.

4. **Select** ★★LDO EX1★★.

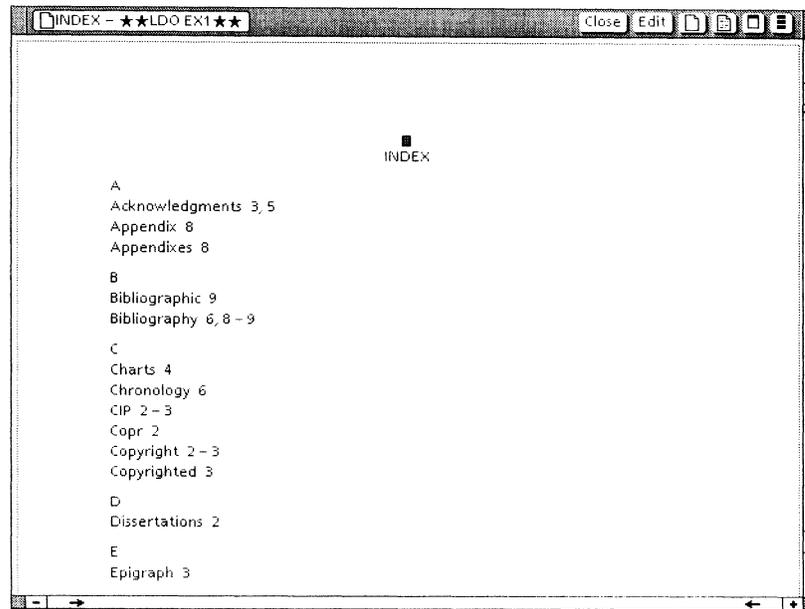
The subject document must always be selected at the moment you start index generation.

5. **Select** [Start].

A new index is now being generated.

6. **Open** INDEX - ★★LDO EX1★★, and **examine** it.





The index is improving, but it still needs work. Your next index refinement will be made through use of an inclusion dictionary.

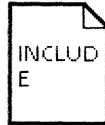
7. **Close** INDEX - ★★LDO EX1★★.
8. **Move** INDEX - ★★LDO EX1★★ to the INDEX VERSIONS folder.

Creating the inclusion index

There are some words being excluded by the exclusion dictionaries that *should* be in the index. One such word is "index;" another is "glossary."

The best way to see that such words are added to a subsequent index is to create an inclusion dictionary.

Creating an inclusion dictionary



1. **Copy** a blank document to the desktop, and **rename** it INCLUDE.
2. **Open** INCLUDE, and **select** [Edit].
3. **Type:** glossary and **press** <RETURN> .
4. **Type:** index.
5. **Close** INCLUDE.
6. **Select** [Index Generator] in the desktop auxiliary menu.
7. **Select** [Dictionary].

The INCLUDE document is still highlighted on your desktop.

8. **Select** [Start].

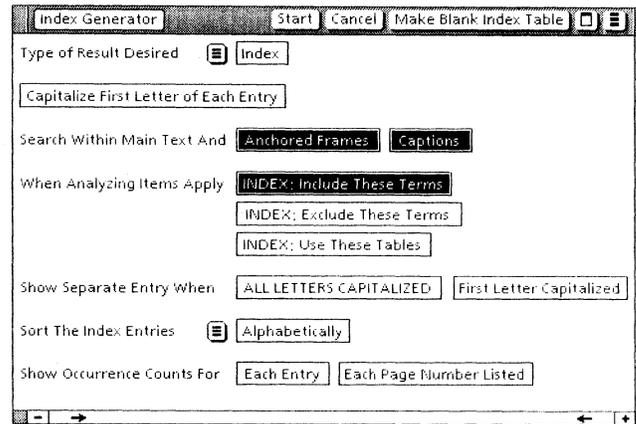
In a moment, the INCLUDE dictionary appears on your desktop.



Bringing the inclusion folder to the desktop

1. **Select** [Index Generator] in the desktop auxiliary menu.

2. **Select** [INDEX: Include These Terms] in the Index Generator option sheet.
3. **Deselect** [INDEX: Exclude These Terms].



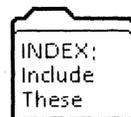
4. **Select** ★★LDO EX1★★.
5. **Select** [Start].

Since there is no INDEX: Include These Terms folder on the desktop, a message appears in your desktop message area:

Object not present on desktop: INDEX: Include These Terms
Do you want a copy of the default object? [YES] [NO]

6. **Select** [YES].

In a moment, the default INDEX: Include These Terms folder appears on the desktop.



The default INDEX: Include These Terms folder is empty. In a moment, the following message appears:

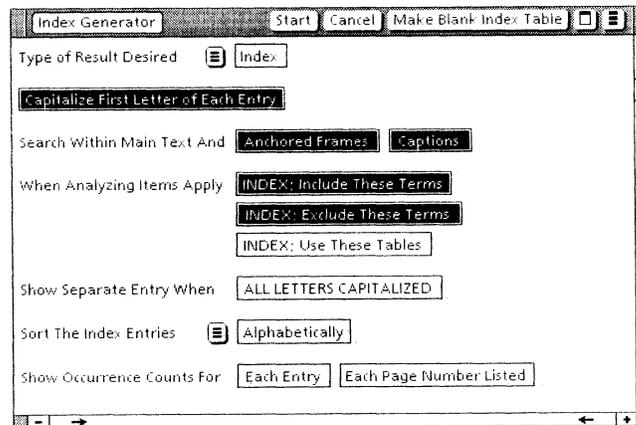
'INDEX: Include These Terms' is empty (or its content is completely invalid for the action requested)
Please correct the problem and retry

7. **Select** [Cancel] in the Index Generator option sheet window header.

Creating the new index with new inclusions

You could run index generator now with only the inclusion option. This would generate an index of two words, "index" and "glossary." By using both the inclusion *and* exclusion options, you add the two new words to the others.

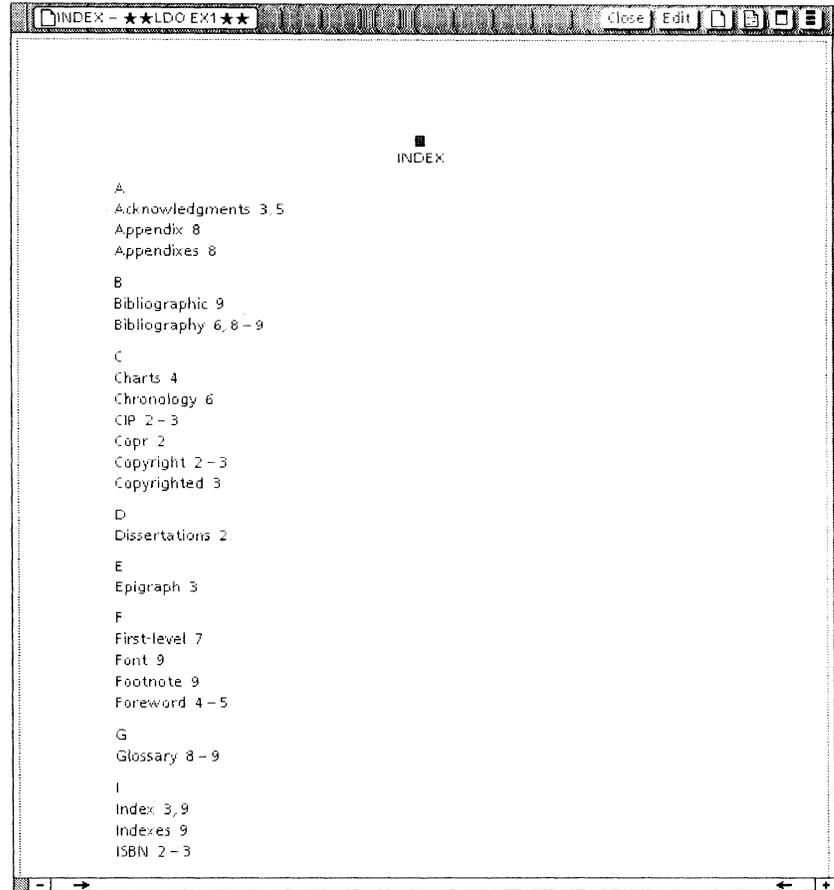
1. **Move** the INCLUDE *dictionary* to the INDEX: Include These Terms folder.
2. **Select** ★★LDO EX1★★.
3. **Select** [Index Generator] in the desktop auxiliary menu.
4. **Select** [INDEX: Include These Terms], and **select** [Capitalize First Letter of Each Entry].



5. Select [Start].

In a moment, the new INDEX - ★★LDO EX1★★ appears on the desktop.

6. Open INDEX - ★★LDO EX1★★ and examine it.



"Glossary" and "Index" are properly added to the index. Notice, however, the separate entries for "Index" and "Indexes," "Appendix" and "Appendixes," and "Bibliography" and "Bibliographic." It is unlikely that you want such variants of terms to be listed separately. The means for dealing with this is through index tables.

7. Close INDEX - ★★LDO EX1★★, and leave it on your desktop.

Creating indexes using tables

Index tables increase your control over index generation. You use them for complex entries such as phrases, variant words from a single root, subentries, cross references, substitute words, or text that requires other special handling.

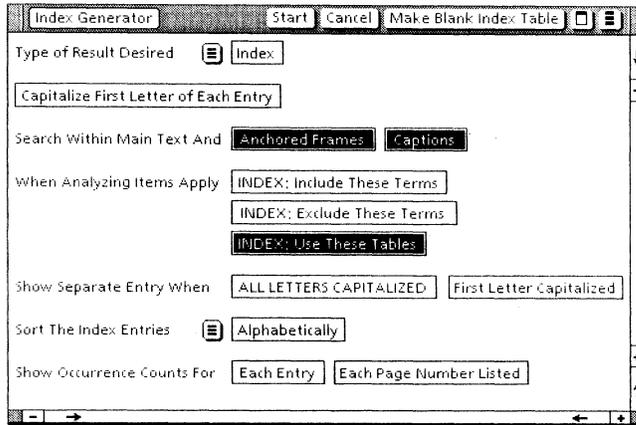
Completing the index table for our sample represents the most complex aspect of this training. The steps are broken into smaller sections, but they represent one progressing example, and you need to go through them in sequence.

Beginning the index table creation

In order to use index tables in index generation, you must bring the INDEX: Use These Tables folder to your desktop. The default of this folder contains a blank index table, which you can use to create your initial index table.



1. Select ★★LDO EX1★★.
2. Select [Index Generator] in the desktop auxiliary menu.
3. Deselect [INDEX: Exclude These Terms], and select [INDEX: Use These Tables].



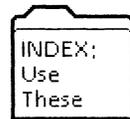
4. Select [Start].

The following message appears:

Object not present on desktop: INDEX: Use These Tables
Do you want a copy of the default object? [YES] [NO]

5. Select [YES].

The folder INDEX: Use These Tables is now brought to the desktop.

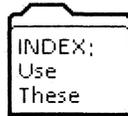


The following message appears:

Obtaining data from INDEX: Use These Tables: Blank Index Table...
'Index Table' is empty (or its content is completely invalid for the action requested)
Please correct the problem and retry

6. Select [Cancel] in the Index Generator option sheet.

Creating the index table



1. **Open** INDEX: Use These Tables.

The folder contains a document named Blank Index Table. Since you can use several such documents in the folder, you need to rename this document.

2. **Rename** the Blank Index Table document "MODIFY."

The new index table document, MODIFY, is now ready for your entries.

Including phrases as index entries

Inclusion and exclusion dictionaries only handle single word entries. In our training sample, you may have noticed that some appropriate entries, such as "table of contents," were not included in the index. The best method for adding such entries to the index generation is to list them in an index table.

Typing a phrase entry into the index table

1. **Open** MODIFY, and **select** [Edit].
2. **Stretch** the window so that all five columns of the table are displayed.
3. **Press** <NEXT>.

Notice the message that appears in your desktop message area. When you use the next key in this table, a series of messages appears describing the function of each column.

The caret is in the ITEM column.

4. **Type:** Table of contents.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				

5. **Press** <NEXT>.
6. **Press** <SKIP> (by pressing <SHIFT> with <NEXT>).

The caret is now in the LIST UNDER column. If you had pressed <NEXT>, you would have created a sub-row for VARIATIONS.

7. **Press** <NEXT> twice.

The caret moves to the CODES column.

8. Press <NEXT>.

This creates a new table row, ready for an additional table entry.

Listing variations for index entries

There are many occasions when you will want to list variations of a word under a single term in the index. The plural and singular form of a word is a good example. The addition of an "s" to a word causes the Index Generator to see it as a separate item from the same word without the "s". The words are listed separately, unless you direct otherwise.

Other words in the sample also should be combined: "copyright" with "copyrighted," "bibliographic" with "bibliography," and others. The process is not difficult.

Listing single variations of entries

1. Open the most recently generated INDEX - ★★LDO EX1★★.

From this list you can copy to the table the words you want treated as a single entry in the index.

2. Copy "Appendix" from the index to the second row, ITEM column, in the table.

<p>WARNING: If you copy trailing or leading blanks with the word or phrase, those blanks will appear in the index.</p>

3. Copy "Appendixes" from the index to the second row, VARIATIONS column, in the table.

A sample index table is shown on the following page.

INDEX: Use These Tables: MODIFY Close Close All Show Next Show Previous Save Reset Save & Edit

Index Table

Hint: To begin filling in a blank Index Table, press <NEXT>.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendixes			

Any occurrence of "appendixes" in the text will now be listed as if it were an occurrence of "appendix."

4. **Select** inside the CODES cell in the second row, and **press** <NEXT>.

This creates an additional table row.

5. **Copy** "Bibliography" from the index to the third row, ITEM column, and **copy** "Bibliographic" to the third row, VARIATIONS column.
6. **Select** the CODES cell ending the row, and **press** <NEXT>.

Listing multiple entry variations

1. **Copy** "Copyright" to the fourth row, ITEM column.
2. **Copy** "Copr" to the fourth row, VARIATIONS column.

This variation is an abbreviation and should end with a period. The period was stripped in the initial screening, since it would ordinarily represent the end of a sentence. You can employ punctuation in an index entry by means of a table.

3. **Type:** a period.

Note that if you have double clicked the selection, there will be a trailing blank space after "Copr"; you will need to delete that space before typing the period.

4. **Press** <NEXT>.

This creates a sub-row for an additional variation of "Copyright."

5. **Copy** "Copyrighted" to the sub-row, VARIATIONS column.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendixes			
Bibliography	Bibliographic			
Copyright	Copr.			
	Copyrighted			

6. **Select** inside the CODES cell ending the row, and **press** <NEXT>.

Completing the entry variations

Continuing to use these techniques, you now complete the index table variations.

1. **Copy** "Index" to the fifth row, ITEM column, and **copy** "Indexes" to the VARIATIONS column.

"Index" was an entry you created in the inclusion dictionary. The table entry will win the match with that dictionary, and "Index" will be listed only as defined by the table.

2. **Select** within the CODES column, and **press** <NEXT>.
3. **Copy** ""Subheadings" to the sixth row, ITEM column, and **copy** "Subheading" and "Subheads" to the same row, VARIATION column.

The table should now look as shown on the following page.

INDEX: Use These Tables MODIFY Close Close All Show Next Show Previous Save Reset Save&Edit

Index Table

Hint: To begin filling in a blank Index Table, press <NEXT>.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendixes			
Bibliography	Bibliographic			
Copyright	Copr.			
	Copyrighted			
Index	Indexes			
Subheadings	Subheading			
	Subheads			

Creating second-level index entries

Second-level entries (or third or fourth-level entries) are aids to the reader of an index, used to group related words and phrases under umbrella terms. Second level entries are normally indented in an index, and are sometimes in a smaller type font than the main entries.

Subentries can be easily created and defined using index tables.

In the training example, the index entries CIP and ISBN are catalog numbers associated with book copyrights. You list them now under the entry "Copyright."

1. **Select** inside the CODES cell in the bottom row of the index table, and **press** <NEXT>.

A seventh table row is created.

2. **Copy** "CIP" from the index to the eighth row, ITEM column.
3. **Copy** "Copyright" from either the index or the fourth row of the table to the new row, LIST UNDER column.

CIP will now be listed as a subentry under "Copyright" in the index.

4. **Select** inside the CODES cell in the bottom row of the table, and **press** <NEXT>.
5. **Copy** "ISBN" to the new row, ITEM column, and **copy** "Copyright" to the new row, LIST UNDER column.

Index Table

Hint: To begin filling in a blank Index Table, press <NEXT>.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendices			
Bibliography	Bibliographic			
Copyright	Copr.			
	Copyrighted			
Index	Indexes			
Subheadings	Subheading			
	Subheads			
CIP		Copyright		
ISBN		Copyright		

6. **Select** inside the CODES cell ending the eighth row, and **press** <NEXT> to create a ninth row.

The subentries "first-level" and "second-level" should be listed under "Subheadings," but they involve a special situation. In an index where the first letters of entries are capitalized, they are generally not capitalized for subentries.

In changing "First-level" to a second-level entry, you need to use a lower case "f" in the table.

7. **Type:** first-level in the ninth row, ITEM column.
8. **Copy** "Subheadings" to the ninth row, LIST UNDER column.

9. Select the CODES cell, and press <NEXT> to create an eleventh row.

10. Type: second-level in the tenth row, ITEM column, and copy "Subheadings" to the tenth row, LIST UNDER column.

INDEX: Use These Tables MODIFY Close Close All Show Next Show Previous Save Reset Save&Edit

Index Table

Hint: To begin filling in a blank Index Table, press <NEXT>.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendixes			
Bibliography	Bibliographic			
Copyright	Copr.			
	Copyrighted			
Index	Indexes			
Subheadings	Subheading			
	Subheads			
CIP		Copyright		
ISBN		Copyright		
first-level		Subheadings		
second-level		Subheadings		

Using codes in index tables

Codes exist for a variety of special circumstances in index generation. If you don't have a problem creating what you want, then you probably don't need to use codes.

Only one index table code is used in this training: "V", the "variations only" search code. This code is useful in several situations. In this instance, it is used in connection with cross-referenced indexing.

Creating cross references with codes

1. **Select** the CODES column in the bottom row, and **press** <NEXT>.
2. **Type:** Foreword see also Preface.

Notice the italics. ITEM entries print in the index exactly as you enter them, so the italics will appear in the index.

The item entry "Foreword see also Preface" does not itself exist in the document text. You want the Index Generator to search for "Foreword."

3. **Press** <NEXT>.

This brings you to the VARIATIONS column.

4. **Type:** Foreword.

This ensures that the phrase "Foreword see also Preface" will appear in the index if the word "foreword" is found in the text. Still, the Index Generator is going to expend its time (and yours) looking for the ITEM phrase, which you already know isn't going to be found.

5. **Select** the CODES column in the same row, and **type:** V.

Be sure to use a capital "V". Using a lower case "v" produces an error message.

The use of the "V" code insures that the Index Generator will search only for the VARIATIONS entry, not for the ITEM entry. Your table should now appear as illustrated on the following page.

INDEX: Use These Tables MODIFY Close Close All Show Next Show Previous Save Reset Save&Edit

Index Table

Hint: To begin filling in a blank Index Table, press <NEXT>.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendixes			
Bibliography	Bibliographic			
Copyright	Copr.			
	Copyrighted			
Index	Indexes			
Subheadings	Subheading			
	Subheads			
CIP		Copyright		
ISBN		Copyright		
first-level		Subheadings		
second-level		Subheadings		
Foreword <i>see also Preface</i>	Foreword			V

When you reference "Foreword" to "Preface," you also want to reverse the reference.

6. Press <NEXT>.
7. Type: Preface see also Foreword.
8. Press <NEXT>.
9. Type: Preface.
10. Select inside the CODES column in the same row, and type: V.

Be sure you type "V" in upper case, as shown. A lower case "v" causes an error message for an index generation using the table.

A sample entry is shown on the following page.

INDEX: Use These Tables MODIFY Close Close All Show Next Show Previous Save Reset Save&Edit

Index Table

Hint: To begin filling in a blank Index Table, press <NEXT>.

ITEM	VARIATIONS (Optional)	LIST UNDER (Optional)	SORT AS (Optional)	CODES (Optional)
Table of contents				
Appendix	Appendixes			
Bibliography	Bibliographic			
Copyright	Copr.			
	Copyrighted			
Index	Indexes			
Subheadings	Subheading			
	Subheads			
CIP		Copyright		
ISBN		Copyright		
first-level		Subheadings		
second-level		Subheadings		
Foreword <i>see also Preface</i>	Foreword			V
Preface <i>see also Foreword</i>	Preface			V

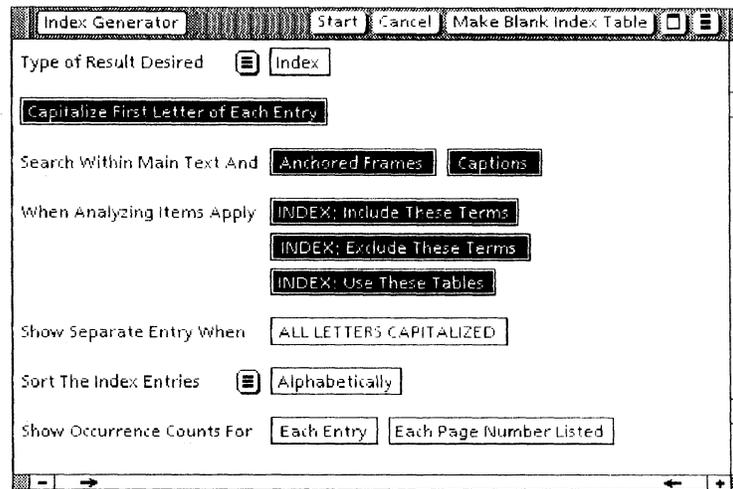
11. Select [Close-All] to close MODIFY, INDEX - ★★LDO EX1★★ and INDEX:Use these terms.
12. Move INDEX - ★★LDO EX1★★ to the INDEX VERSIONS folder.

If your system is low on disk pages, you may delete INDEX - ★★LDO EX1★★ rather than storing it in the INDEX VERSIONS folder.

Generating the index using index tables

You now generate an index using the same dictionary screens as before, together with the index table document, MODIFY. MODIFY must be inside the INDEX: Use These Tables folder (if it is not there already, move it into the folder before continuing).

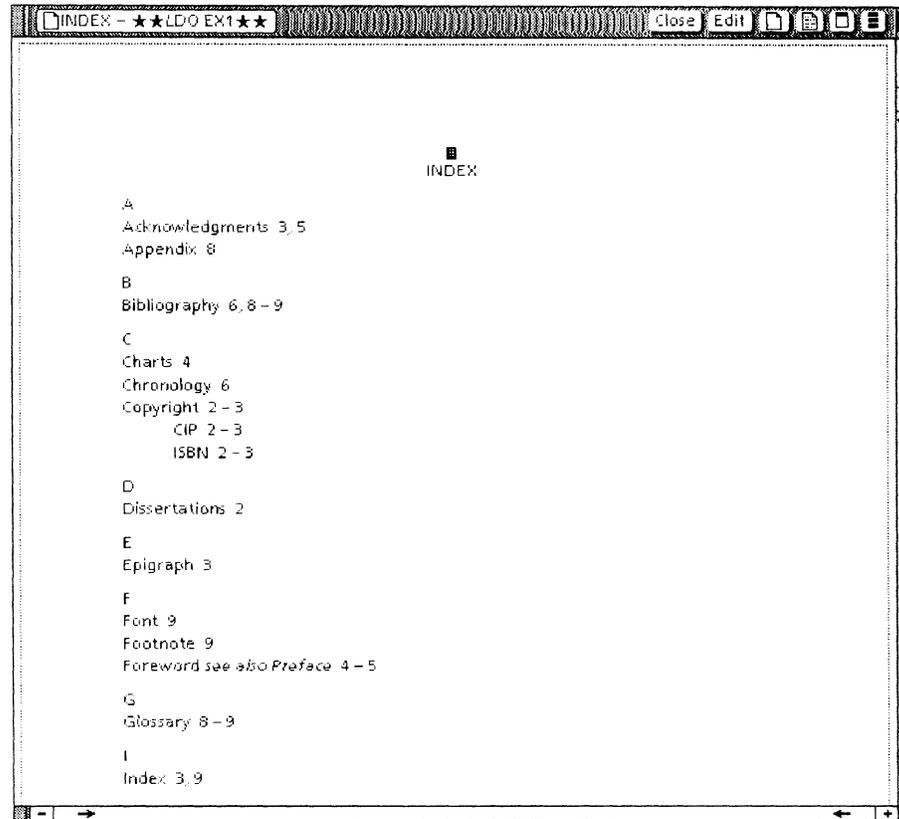
1. Select ★★LDO EX1★★.
2. Select [Index Generator] in the desktop auxiliary menu.
3. Select [Capitalize First Letter of Each Entry].
4. Select [INDEX: Include These Terms].
5. Select [INDEX: Use These Tables].



6. Select [Start].

This index generation uses the dictionary screens and index table instructions you created. If an item is listed both in a dictionary and in an index table, the table's instructions take precedence. When the process is complete, the new index appears on your desktop.

7. **Open INDEX - ★★LDO EX1★★**, and examine it.



Notice how the new index is affected by the index table instructions you created.

8. **Close INDEX - ★★LDO EX1★★**.

9. **Move INDEX - ★★LDO EX1★★** to the INDEX VERSIONS folder.

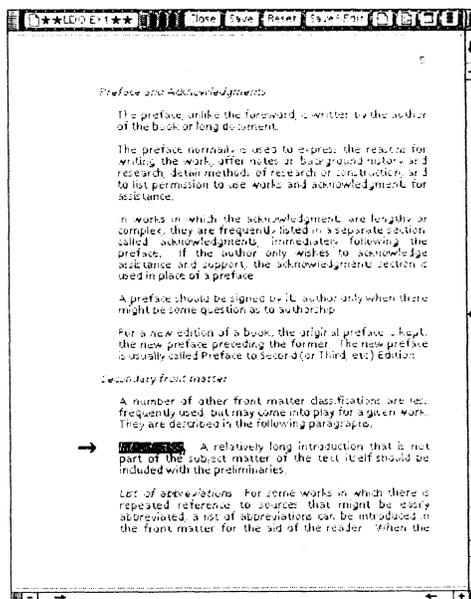
Marking individual entries

You may sometimes need to index one occurrence of a word and ignore other occurrences of the same word. The word "introduction," for example, occurs on pages 1, 3, 5, and 7 of the sample. On pages 5 and 7 it should be indexed. On pages 1 and 3 it should be ignored.

The Index Generator allows you to mark individual text for special treatment. The marked words or sections of text are called *index objects*. There are a variety of uses for index objects. This training covers only one: marking items for index entry.

Creating the index object

1. Open **★★LDO EX1★★**, select [Edit], and select [Show Structure].
2. Scroll to page 5, and select "Introduction."

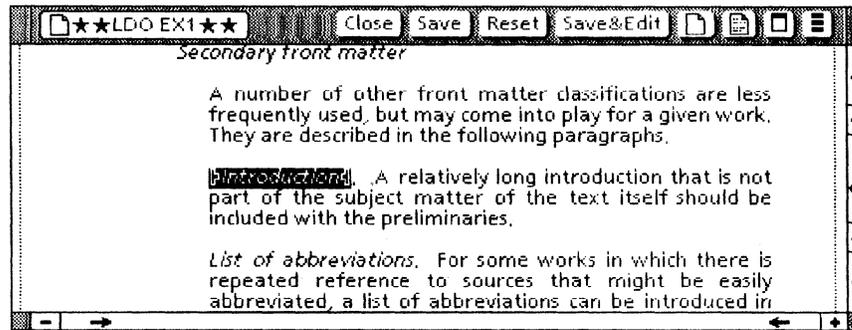


Be sure that you don't include the period following "Introduction." This punctuation would become part of the index entry.

3. **Select** [Establish Index Object] in the second document auxiliary menu.



This inserts brackets around the word "Introduction," defining it as an index object.



4. **Select** the next instance of "introduction" on the same line, and **select** [Establish Index Object] in the document auxiliary menu.
5. **Scroll** to page 7.
6. **Select** the instances of "introduction" on page 7, and **establish** each, in turn, as an index object.

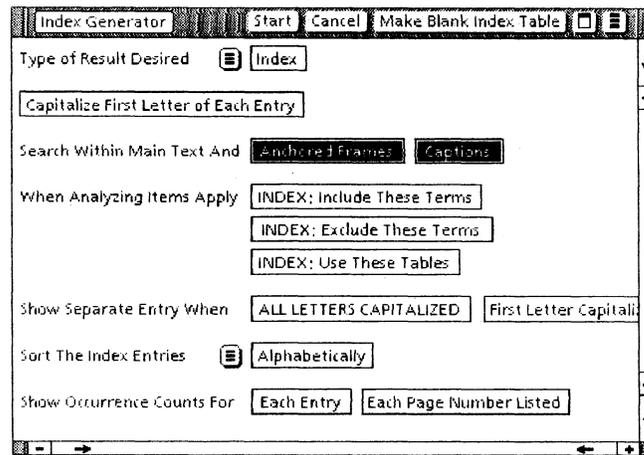
By marking all occurrences of the word "introduction" you want indexed, should subsequent editing place them on separate pages, the selected words will still be indexed correctly.

7. **Close** ★★LDO EX1★★.

Generating the index using index objects

For a short text with only a few index entries, you may want to generate the entire index using only index objects. You use that method now to reveal how the index objects you have created will appear in an index.

1. **Select** ★★LDO EX1★★.
2. **Select** [Index Generator] in the desktop auxiliary menu.
3. **Deselect** [INDEX: Exclude These Terms].



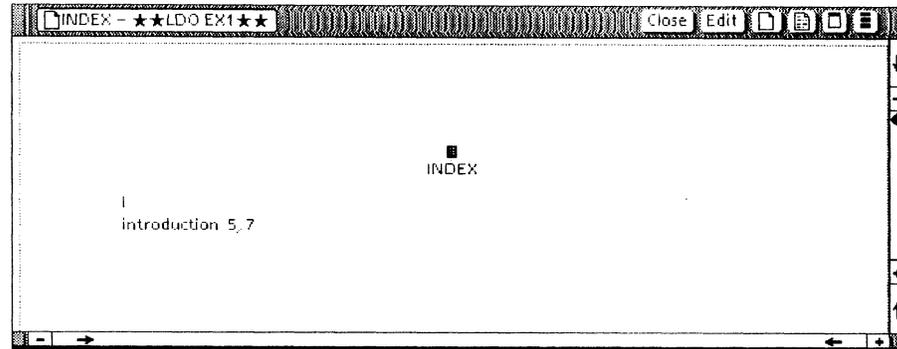
By selecting *no* index folder for analyzing the sample document, only marked text can appear in the index.

4. **Select** [Start].

After index generation is completed, the new index icon appears on your desktop.



5. **Open INDEX - ★★LDO EX1★★, and examine it.**



The index object "introduction" has appeared, referenced to page 5 and 7, while omitting references to pages 1 and 3.

Notice that although some marked text occurrences were in italics, the index entry appears in the font determined by the layout guide.

You could now run the full index, with the exclusion dictionaries, inclusion dictionary, and the index table you created, and the word "Introduction" would be inserted neatly in its place. Before you generate that last training index, you modify the layout guide, as detailed in the next section.

6. **Close INDEX - ★★LDO EX1★★.**

7. **Move INDEX - ★★LDO EX1★★ to the INDEX VERSIONS folder.**

If your system is low on disk pages, you may delete INDEX - ★★LDO EX1★★ rather than storing it in the INDEX VERSIONS folder.

Changing the index appearance

You can use a template named INDEX: Layout Guide to set your index format before you generate the index. Earlier in this training you brought the default INDEX: Layout Guide to the desktop. By altering the layout guide, you can generate future indexes in whatever format you desire.

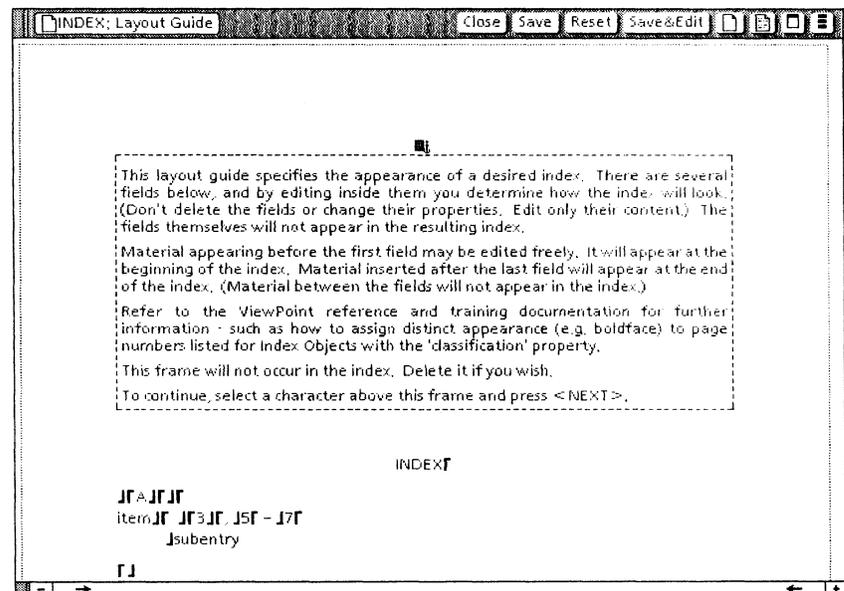
Altering the index page format



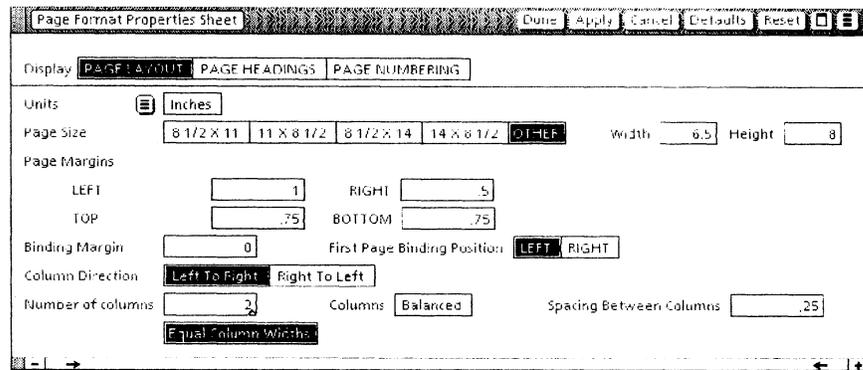
The default INDEX: Layout Guide generates an index in 8.5 by 11-inch page format, set in single column. You now alter the layout guide to create indexes set to two columns and a 6.5 by 8-inch page. This page dimension matches the continuing sample.

1. Open INDEX: Layout Guide, and select [Edit].

The default guide is created with [Show Structure] selected.



2. **Select** the Page Format Character, and **press** <PROP'S>.
3. **Select** [PAGE LAYOUT], and **select** [OTHER] for the Page Size option.
4. **Set** the width and height values at 6.5 and 8 inches.
5. **Set** the page margins at LEFT: 1, RIGHT: .5, TOP: .75, and BOTTOM: .75.
6. **Set** [Number of columns] to 2.



7. **Select** [Done].

This completes the changes to the page layout. Next you alter individual entry characteristics.

Changing index entry characteristics

1. **Press** <NEXT> twice.

Notice the messages displayed as you move from one field to the next using <NEXT> in the layout guide. These messages describe options and functions associated with each layout guide field.

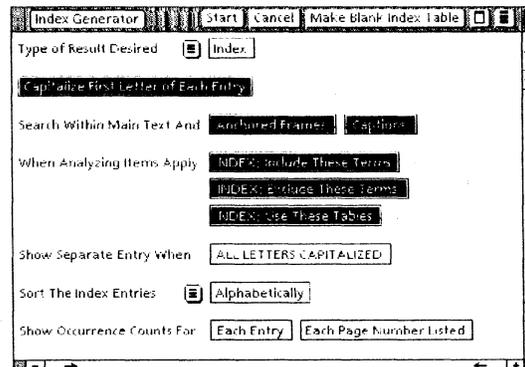
The caret should now be in the field that determines the properties of the letter heading each index section. You now make it bold.

2. **Press** <F2> (<BOLD>).
3. **Select** the word "INDEX," and **press** <PROP'S>.

4. **Select** [CHARACTER]; then **select** [Bold].
5. **Select** [PARAGRAPH]; then **select** [Flush Left].
6. **Select** [Done].
7. **Close** INDEX: Layout Guide.

Generating the composite index

1. **Select** ★★LDO EX1★★.
2. **Select** [Index Generator] in the desktop auxiliary menu.
3. **Select** [Capitalize First Letter of Each Entry].
4. **Select** [INDEX: Include These Terms].
5. **Select** [INDEX: Use These Tables].

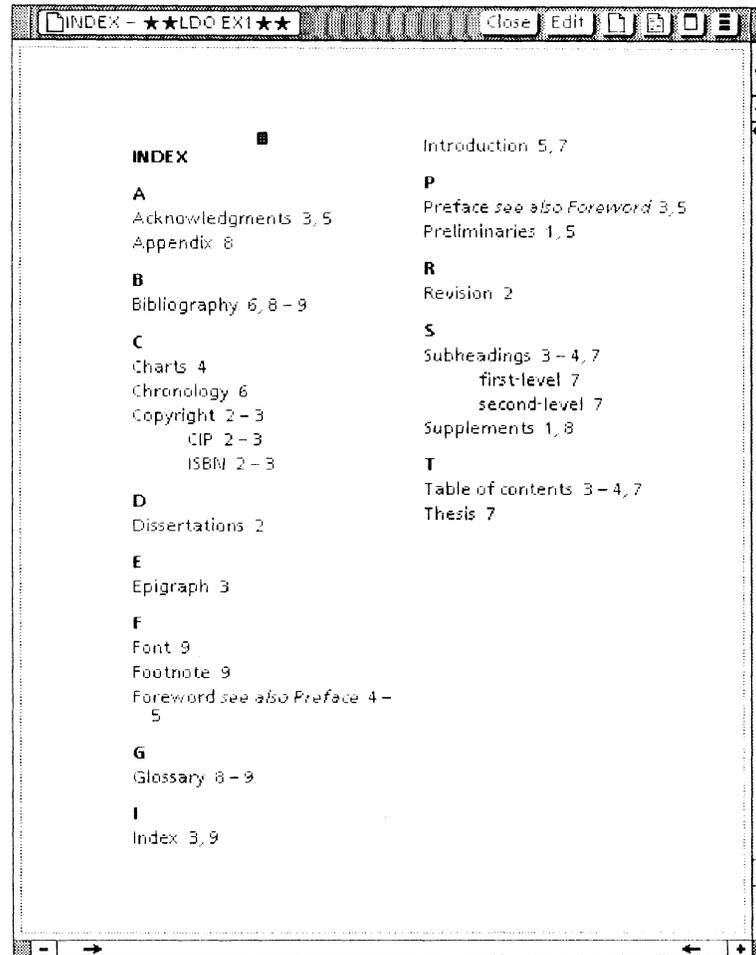


6. **Select** [Start].

The index entries are automatically directed into a copy made from the layout guide you modified. When the index generation is complete and no significant problems are encountered, the new index appears on your desktop.



7. Open INDEX - ★★LDO EX1★★, and examine it.



The generated index is now highly refined and can easily be further modified.

8. Close INDEX - ★★LDO EX1★★.

Save the screening folders and layout guide you have created in this chapter. You will use them again in chapter 5, when index generation is applied to a book.

For more information on using the Index Generator, refer to the *Document Editor Options Reference* volume.

4. Creating a table of contents

The table of contents generator automatically creates a table of contents for a prepared document or book. You prepare the document or book by marking the headings in the text that you want to be listed in the table of contents. Once the headings have been marked, revisions to the text are automatically reflected when you generate a new table of contents.

In the following training, you continue to modify the sample you used in the footnotes and Index Generator training.

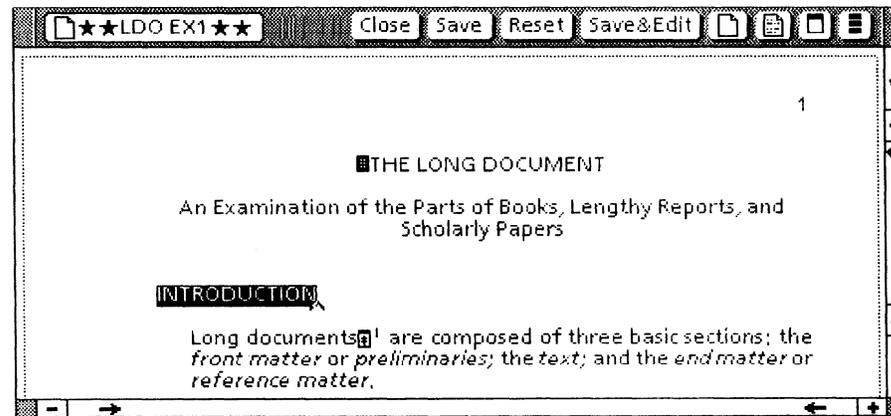
If you skipped chapters 2 and 3, you need to copy ★★LDO EX1★★ to your desktop from the Training: Long Document Options folder at this time. The table of contents training will work with this sample, but since it does not include changes made in chapters 2 and 3, what you see on your screen will not exactly match this chapter's illustrations.

Marking the text headings

Before you generate a table of contents, you mark the desired headings in the text.

Marking first-level headings

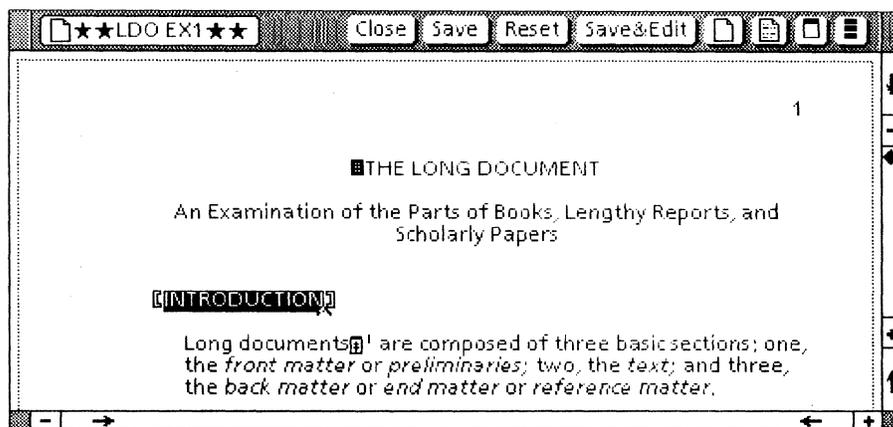
1. **Open** ★★LDO EX1★★, and **select** [Edit].
2. **Select** [Show Structure] (if not already selected).
3. **Select** the word “INTRODUCTION” in the text.



4. **Select** [Mark Text Sequence] in the second document auxiliary menu.



The [Mark Text Sequence] command creates a single set of bounding characters around the word “INTRODUCTION,” as shown in the illustration on the following page.

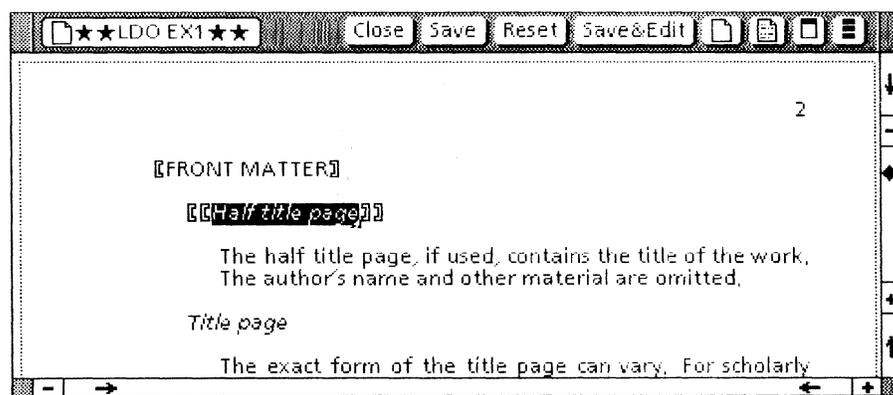


5. Scroll to page 2, select "FRONT MATTER," and select [Mark Text Sequence] from the document auxiliary menu.

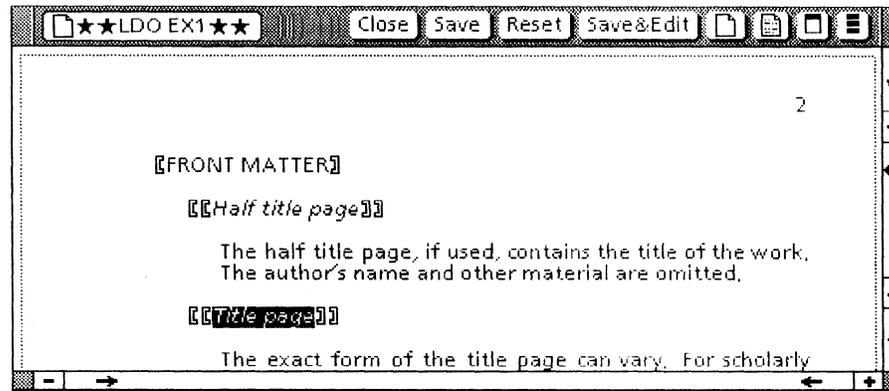
Marking second-level headings

To get a second-level heading, you select [Mark Text Sequence] twice in succession.

1. Select the heading "Half title page."
2. Select [Mark Text Sequence] twice.



3. Select the heading "Title page;" then select [Mark Text Sequence] twice.



Notice the double bracket sets about second-level headings. Through the same means of multiples of the [Mark Text Sequence] commands, further levels of headings can be generated.

Completing the marking for table of contents headings

1. Mark the remaining headings for either first-level or second-level table of contents heading, as appropriate.
You don't have to mark them all, but the training illustrates a completed sample. The table of contents you generate will reflect the headings you have marked.
2. Close ★★LDO EX1★★.

Generating the table of contents from the marked text



1. Select ★★LDO EX1★★.
2. Select [Generate Table of Contents] in the desktop auxiliary menu.

When the process is completed, the table of contents icon appears on your desktop.



3. Open TOC - ★★LDO EX1★★.

Table of Contents	
INTRODUCTION	1
FRONT MATTER	1
Half title page	1
Title page	1
Copyright page	1
Dedication	1
Epigraph	1
Table of Contents	3
List of Illustrations	4
List of Tables	4
Foreword	4
Preface and Acknowledgments	5
Secondary front matter	5
TEXT	7
Introduction	7
Parts	7
Chapters	7
Subheads	7
BACK MATTER	8
Appendix	8
Notes	8
Glossary	8
Bibliography	8
Index	8

4. Examine TOC - ★★LDO EX1★★.

Your table of contents should contain the text headings you marked in the sample document.

For more information on table of contents generation, refer to the *Document Editor Options Reference* volume.

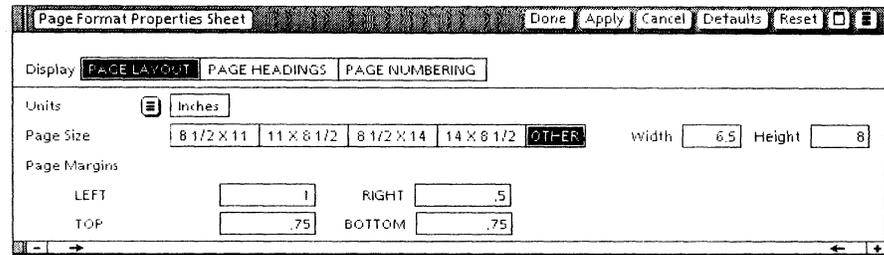
Formatting the table of contents: optional training



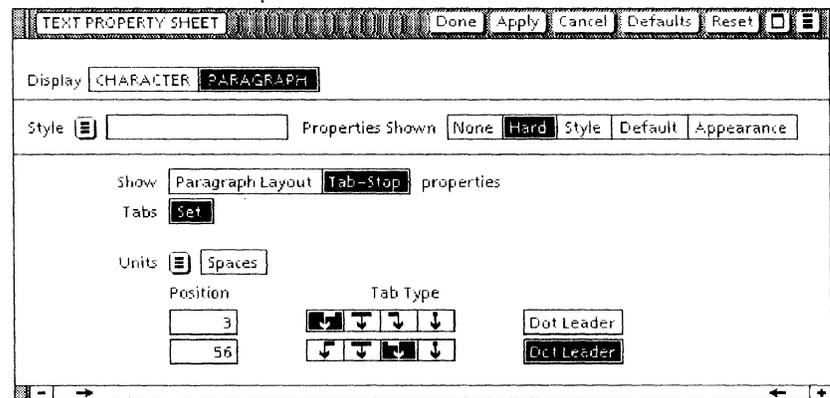
The table of contents generator, unlike the Index Generator, does not have a layout guide that allows you to control the format *before* table of contents generation. A table of contents is automatically generated to an 8 1/2 by 11-inch page layout. To change the table of contents page layout or appearance, you must edit it *after* the generation process is completed.

As optional training, you can make the generated table of contents match the continuing sample by changing the page layout and the tab properties.

Set the page size (accessed through the Page Format Properties Sheet) to 6.5 by 8 inches. Set the margins as follows: left at 1 inch, right at .5 inch, and top and bottom at .75 inch.



Set the tab stops (in the Text Property Sheet) at 3 and 56. Set the dot leader and tab type selections as illustrated below.



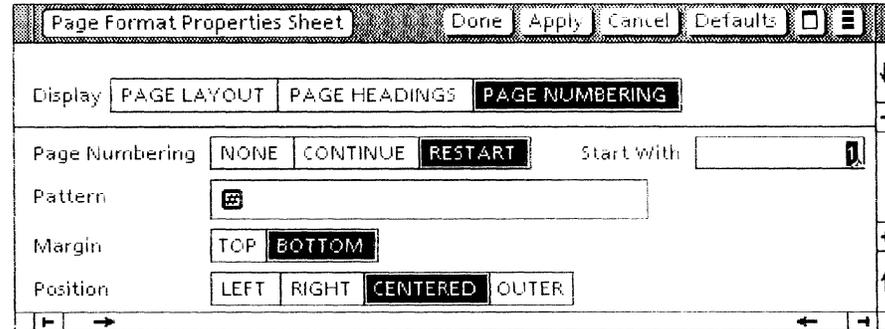
After pagination, the table of contents is changed to the corrected size.

Inserting the page numbering character

WARNING: The page number delimiter character must be in the "Pattern" field of the page numbering option of the Page Format Properties Sheet when the final pagination is made prior to a table of contents generation. If it is not, the table of contents will list "page equivalents," appearing as =1, =2, =3, etc.

The way page numbers in the table of contents will appear is set in the page numbering option of the Page Format Properties Sheet of the subject document. In the sample it has been preset, but you need to know how to correctly set it for your own documents.

1. **Open** ★★LDO EX1★★, **select** [Edit], and **select** [Show Structure].
2. **Select** the Page Format Character, and **press** <PROP'S>.
3. **Select** [Page Numbering].



Notice the page number delimiter character in the Pattern field. If it had not been entered, you would create it by selecting that field and pressing <KEYBOARD>, <SPECIAL>, and <4>.

4. **Close** the Page Format Properties Sheet, and **close** ★★LDO EX1★★.

You will continue to use this sample in the next chapter.

For more information regarding page format options or table of contents generation, consult the *Document Editor Options Reference* volume.

5. Using VP Long Document Options with books

The VP Long Document Options applications have special capabilities when you use them in conjunction with the books feature of VP Document Editor. If you are not already familiar with the books feature, refer to the *Document Editor Options Reference* volume.

You can assemble documents within a book icon and process them as a whole. Both the Index Generator and the table of contents generator bridge document boundaries when applied to documents collected within a book.

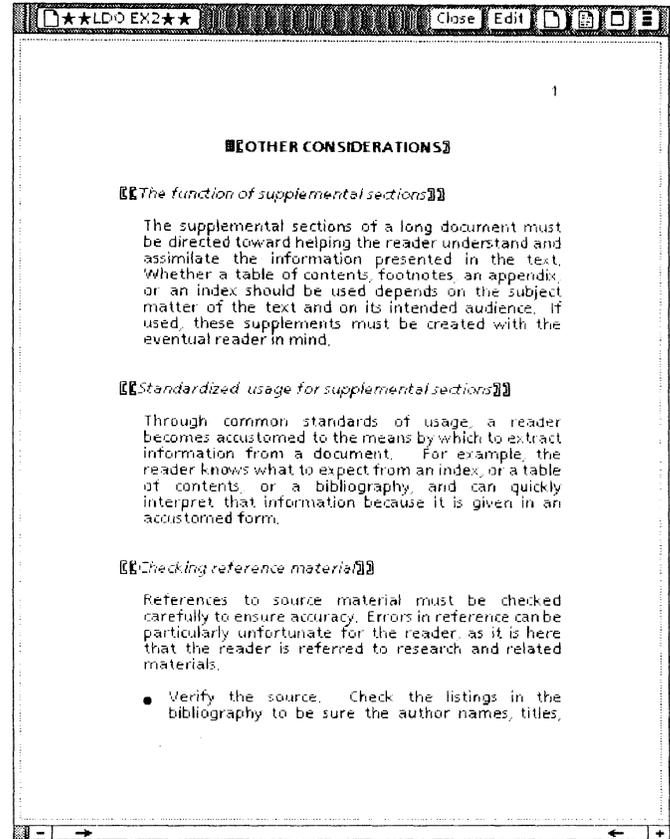
You can also use the footnotes application on a book icon, but it works on each contained document as a separate entity. The footnotes feature cannot create a single composite list of notes, or a consecutive numeric series for the book as a whole.

Preparing for the books exercise

In this chapter, you continue to use the sample ★★LDO EX1★★. In addition you use ★★LDO EX2★★, which you copied to your desktop in chapter 1 of this training.

★★LDO EX2★★ is an addition to the text of the continuing sample. You generate a new table of contents and a new index based on this combined text.

1. Open ★★LDO EX2★★.



Notice that the new sample has been pre-marked for table of contents entries, as shown by the brackets, which are visible when [Show Structure] is selected.

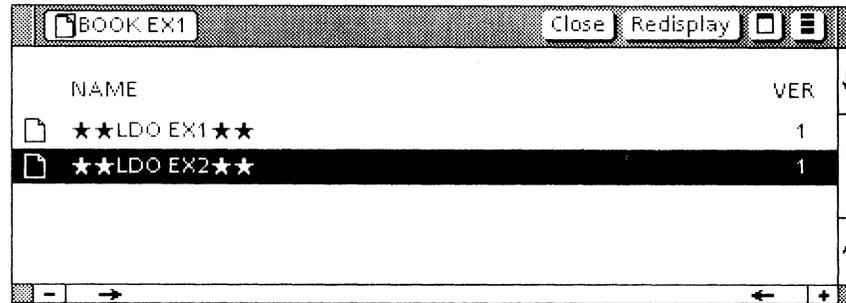
2. Close ★★LDO EX2★★.

Creating the book



You must first create the book to work in.

1. **Copy** a Blank Book icon from the Basic Icons folder to your desktop.
2. **Rename** the icon BOOK EX1.
3. **Open** BOOK EX1.
4. **Move** ★★LDO EX1★★ to BOOK EX1.
5. **Move** ★★LDO EX2★★ beneath ★★LDO EX1★★.



The book feature reads the documents in the order (top to bottom) that they appear in the book icon.

In order to properly paginate the two samples, the second must be set to [CONTINUE] in the page numbering option of the Page Layout Properties Sheet. Since that is preset in the sample, you may continue.

6. **Close** BOOK EX1.
7. **Select** [Paginate] in the desktop auxiliary menu.

The book is now being paginated in background processing. When the process is complete, you can use the VP Long Document Options applications on the book icon.

Using footnotes in books

The footnotes feature performs on books as a collection of individual documents. Paginating a book containing footnotes has the same effect with regard to footnotes as paginating the separate documents one at a time.

Footnotes cannot be sequenced beyond document boundaries, nor can the second document in a book be set to start at some number other than 1. Therefore after the pagination of a book, each document in the book has its first footnote numbered 1 (or the first symbol in a non-numeric sequence).

It is possible to have the notes collected at the end of each document, as chapter endnotes, but this stylistic practice is no longer common. More likely, for multiple documents in a book icon, you will use same-page footnotes. Each document then represents a chapter, with the notes numbered from 1. If there are only to be a few notes, you can use the asterisk-dagger sequence, beginning with the asterisk on each new page.

Using the Index Generator in books

You apply the Index Generator on a book icon using the same methods you use for a document icon. When applied to a book, the Index Generator can span document boundaries. A single index can be generated for a sequence of documents in a book.

In this section, you use the index dictionaries, layout guide, and index table you created in chapter 3. Be sure that the folders INDEX: Exclude These Terms, INDEX: Include These Terms, and INDEX: Use These Tables, as well as the document INDEX: Layout Guide, are on your desktop.

If you did not complete the chapter 3 training, use the default options in the Index Generator option sheet and follow the message area prompts. An index will be generated for the entire book, but it will not match the subsequent illustration.



1. Select the icon BOOK EX1.

You paginated this book earlier in the chapter. If you were not sure that it had been paginated, you would repaginate before indexing.

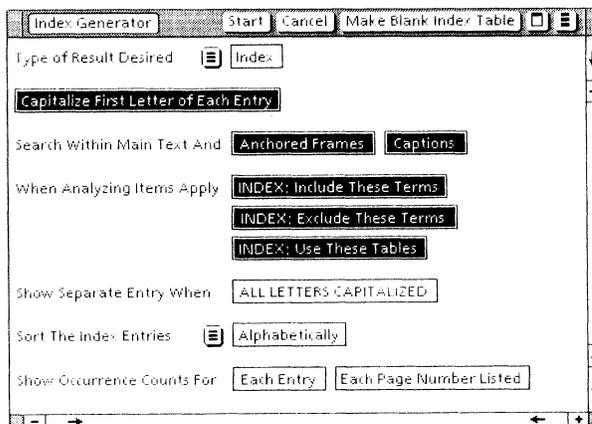
2. Select [Index Generator] in the desktop auxiliary menu.

This brings the Index Generator option sheet to the desktop.

3. Select [Capitalize First Letter of Each Entry].

4. Select [INDEX: Include These Terms].

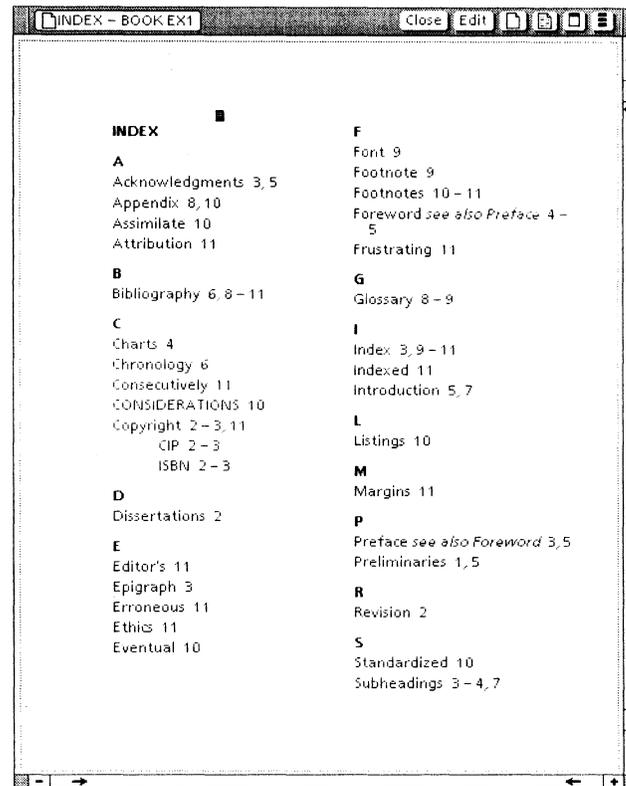
5. Select [INDEX: Use These Tables].



6. Select [Start] .

In a moment, the index appears on your desktop.

7. Open INDEX - BOOK EX1.



Notice the additions to the index. Any entry on pages 10 or 11 must be new, as ★★LDO EX1★★ is 9 pages in length.

The new index entries are from the same screens applied to the new text of ★★LDO EX2★★. Some of these entries are appropriate for the index; others are not. As detailed in chapter 3, you can now modify the index directly, or indirectly, by adding new exclusions to a dictionary in the exclusion folder. Refer to the *Document Editor Options Reference* volume for further information.

8. Close INDEX - BOOK EX1.

Using the table of contents generator in books

You apply the table of contents generator on a book icon using the same methods you use on a document icon. When applied to a book, the table of contents generator can span document boundaries. A single table of contents can be generated for a sequence of documents in a book.

Preparing for table of contents generation on a book

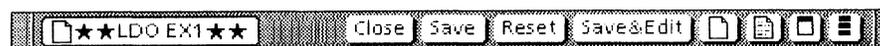
Before generating the table of contents, you mark the desired headings in the text, and complete the book's pagination.

In chapter 4, you marked the ★★LDO EX1★★ for table of contents generation. (If you did not complete that training, mark at least some of the headings in the sample now.) The sample ★★LDO EX2★★ is pre-marked for table of contents entries.

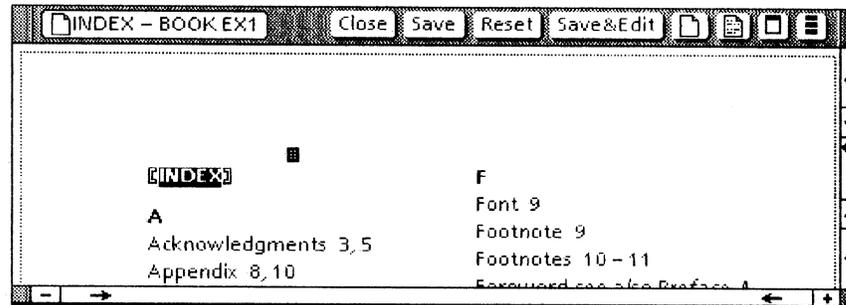
The newly created index, however, needs to be marked if it is to be added to the book and listed in the table of contents. Additionally, the page numbering option needs to be set.

Marking the headings

1. **Open** INDEX - BOOK EX1, and **select** [Edit].
2. **Select** the word "INDEX" in the document.
3. **Select** [Mark Text Sequence] in the second document auxiliary menu.



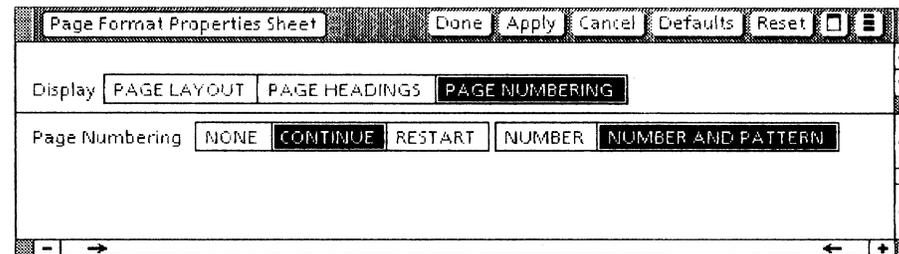
This inserts the table of contents bounding characters, as shown in the following illustration.



The new heading is now marked for table of contents generation.

Setting the page numbering

1. **Select** the page format character, and **press** <PROP'S>.
2. **Select** [PAGE NUMBERING], **select** [CONTINUE], and **select** [NUMBER AND PATTERN].

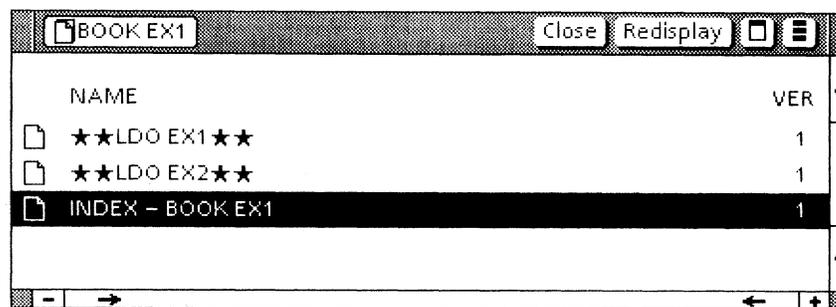


3. **Select** [Done].
4. **Close** INDEX - BOOK EX1.

Generating the table of contents for a book

You must insert each document in a book in the order you intend for the table of contents.

1. **Open** BOOK EX1.
2. **Move** INDEX - BOOK EX1 to below ★★LDO EX2★★.



3. **Close** BOOK EX1.
4. **Select** [Paginate] in the desktop auxiliary menu, and **wait** for the pagination to finish.
5. **Select** BOOK EX1.
6. **Select** [Generate Table of Contents] in the desktop auxiliary menu.

In a moment, the TOC - BOOK EX1 icon appears on your desktop.



For more information on using the table of contents generator with books, refer to the *Document Editor Options Reference* volume.

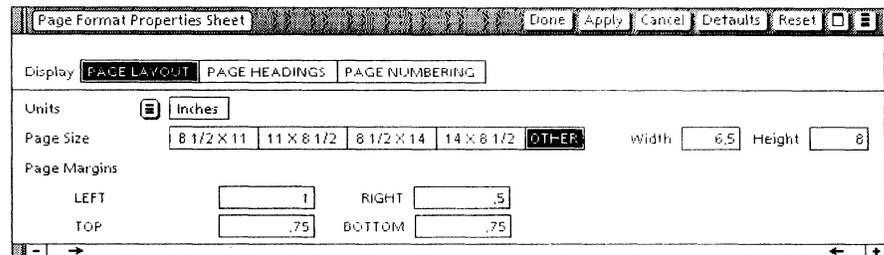
Formatting the book table of contents: optional activity



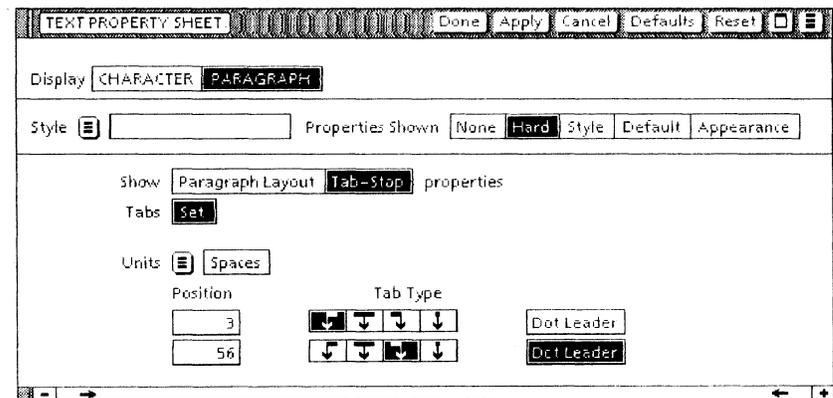
The table of contents is automatically generated in an 8 1/2 by 11-inch page format. As explained in chapter 4, in order to conform to the continuing text sample it must be formatted *after* table of contents generation.

As an optional activity, format TOC - BOOK EX1 to match the format of the continuing sample.

Set the page size (accessed through the Page Format Properties Sheet) to 6.5 by 8 inches. Set the margins as follows: left at 1 inch, right at .5 inch, and top and bottom at .75 inch.



Set the tab stops (in the Text Property Sheet) at 3 and 56. Set the dot leader and tab type selections as illustrated.



Finally, paginate the document. After pagination, the table of contents matches the format of the continuing sample.

Examining the table of contents

1. Open TOC - BOOK EX1, and examine it.

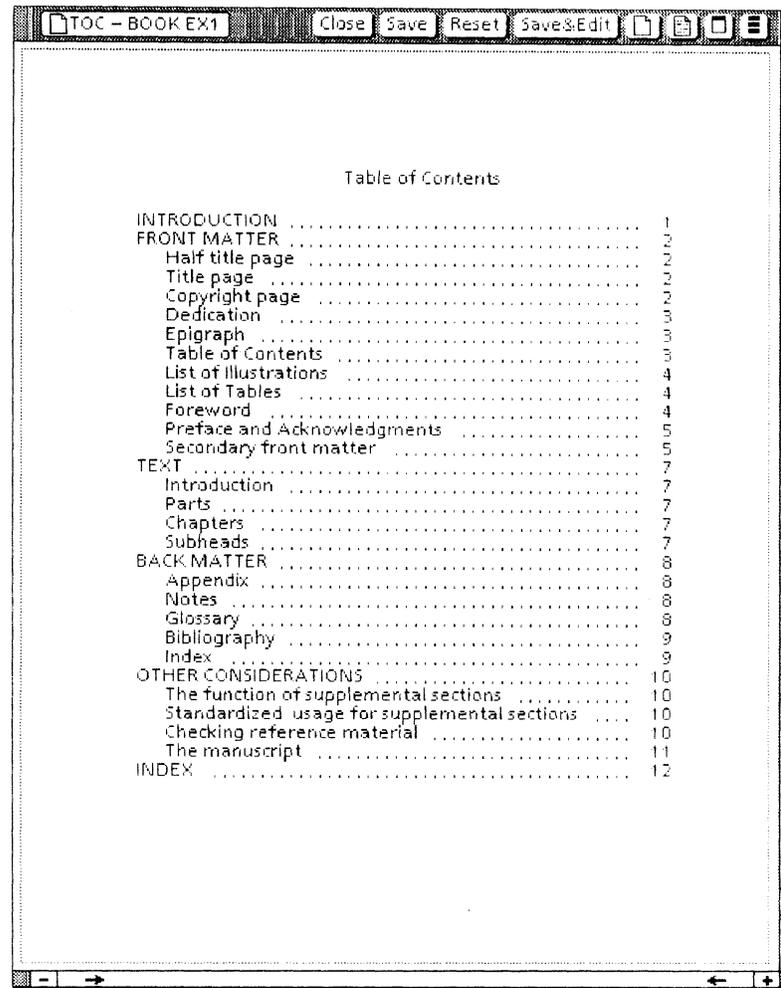


Table of Contents	
INTRODUCTION	1
FRONT MATTER	2
Half title page	2
Title page	2
Copyright page	2
Dedication	3
Epigraph	3
Table of Contents	3
List of Illustrations	4
List of Tables	4
Foreword	4
Preface and Acknowledgments	5
Secondary front matter	5
TEXT	7
Introduction	7
Parts	7
Chapters	7
Subheads	7
BACK MATTER	8
Appendix	8
Notes	8
Glossary	8
Bibliography	9
Index	9
OTHER CONSIDERATIONS	10
The function of supplemental sections	10
Standardized usage for supplemental sections	10
Checking reference material	10
The manuscript	11
INDEX	12

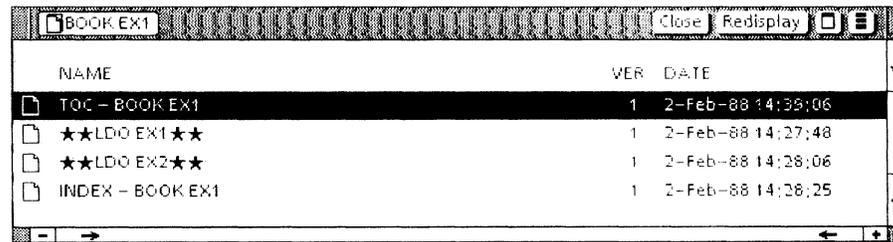
Illustrated is the table of contents from fully marked samples, reformatted to a 6 1/2 by 8-inch layout.

2. Close TOC - BOOK EX1.

Completing the book

The new table of contents can now be moved to the book. VP Long Document Options is designed so that in any subsequent index generation performed on the book icon, it will not read text within either an index generated by the Index Generator or a table of contents generated by the table of contents generator.

1. **Open** BOOK EX1.
2. **Move** TOC - BOOK EX1 to the top position in BOOK EX1.



NAME	VER	DATE
TOC - BOOK EX1	1	2-Feb-88 14:38:06
LDO EX1	1	2-Feb-88 14:27:48
LDO EX2	1	2-Feb-88 14:28:06
INDEX - BOOK EX1	1	2-Feb-88 14:28:25

3. **Close** BOOK EX1.

For more information on using books, refer to the *Document Editor Options Reference* volume.

6.

Using a shared book

A shared book is a publication management tool that allows you and users on other workstations to share the writing and revising of a book. A shared book helps you keep track of previous versions of the documents it contains, it prevents another user from editing the document you are working on, and it lets you exclude certain documents from the final publication.

A shared book exists in two places: the remote shared book on a file server, and the local copies on the workstations of the users of the shared book. Changes you make to your local copy can be saved to the remote shared book, where they become available to the other users.

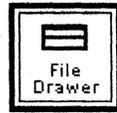
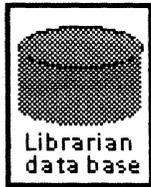
The Shared Books application includes many of the same features as books, such as pagination across document boundaries, and index and table of contents generation for several documents.

In the following training, you first practice using a shared book without actually having to share it. Second, as an optional exercise, you practice using a shared book with a coworker.

For more detailed information on the features of the Shared Books application, refer to the *Workstation Administration and System Resources Reference* volume.

Requirements for using shared books

To use the Shared Books application, your workstation must be on the network. You must have access to a file drawer and to the Librarian data base used by the Shared Books application.



Before you begin the training session, be sure you have the following information:

- The fully qualified name of the Librarian data base
- The pathname of the file drawer, and the folder or folders (if any), in which the shared book is to be stored

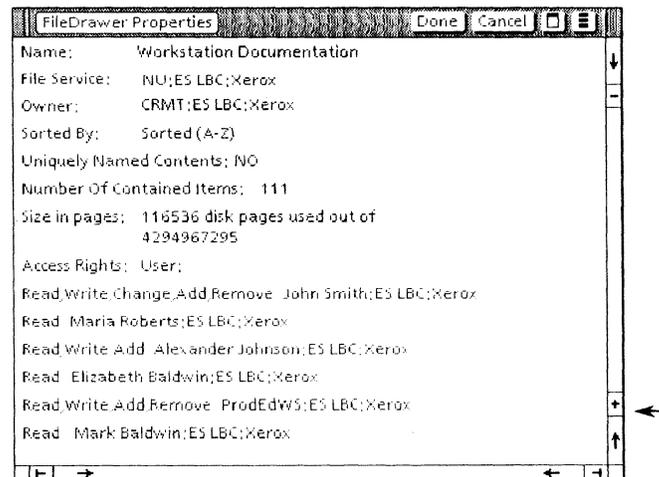
Spaces are provided on the next page for you to write down this information. You need it to create and use a shared book.

Determining your access rights

To use Shared Books, you must have *read, write, add, and remove* access to the file drawer. You can determine your access rights by looking at the property sheet of the file drawer.

1. **Select** the file drawer, and **press** <PROP'S> to open the property sheet.
2. **Look** for your name or the name of your group under "Access Rights: User."

In the illustration below, members of the group called "ProdEdWS:ES LBC:Xerox" have read, write, add, and remove access rights to the file drawer Workstation Documentation.



If you do not have appropriate access rights, consult your project leader or your system administrator. You must either have your

access rights changed, or you must find another file drawer to which you do have appropriate access rights before you can proceed with this training.

For more information about access rights, refer to the *Workstation Administration and System Resources Reference* volume.

- You cannot proceed with the training if the Librarian Service is not available to you. Consult your project leader or your system administrator if you are not sure whether the Librarian Service is available.

Creating a new shared book

You use the property sheet of the Blank Shared Book icon to create a new shared book. Once the shared book is created, it is available to the other members of the user group.

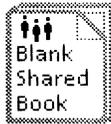
Spaces are provided below for you to write down the information you need to create a shared book. This training cannot provide the names of the Librarian data base and file drawer appropriate for you. They must be obtained from your project leader or system administrator.

On the following page, you choose the name for the shared book. The shared book name must be unique to the file drawer. The space below is provided for you to record that name.

Librarian data base name:

Pathname of the file drawer:

Name of the shared book:



1. **Open** the Basic Icons folder in the Workstation divider of the Directory, and **copy** the Blank Shared Book icon to your desktop.
2. **Select** the Blank Shared Book icon, and **press** <PROP'S> to open the Shared Book Properties sheet.

Shared Book Properties

Name:

Revision: --- Last Modified: 26-Aug-87 13:08:02

Number Of Entries: 0 Total Disk Pages: 1 Shared Book Pages: 1

Notes:

Database:

Remote Location:

You must always change the name of the Blank Shared Book icon and give it a unique name to identify your shared book. Use your first name, your initials, or any other name you wish for your shared book.

3. **Delete** "Blank Shared Book" from the Name field.
4. **Type:** your name and then Shared Book in the Name field.
5. **Record** the name you have chosen in the space provided on the previous page (if you have not already done so).
6. **Type:** the fully qualified name of the Librarian data base in the Database field.

Use the following format:

DataBaseName:Domain:Organization

7. **Type:** the pathname of the file drawer where the shared book is to be stored in the Remote Location field.

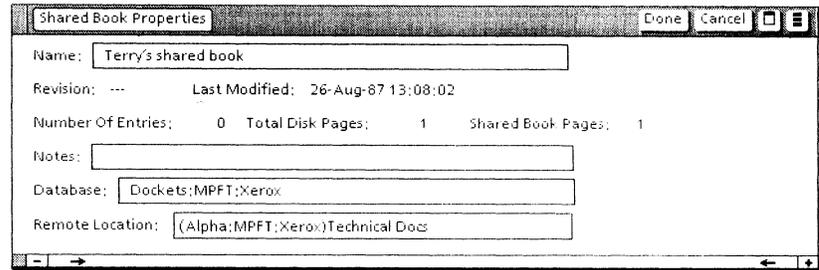
Use the following format:

(FileService:Domain:Organization)File Drawer

or

(FileService:Domain:Organization)File Drawer/Folder

The following illustration is an example of how the property sheet should look. Yours will have a different name, database, and remote location.



8. Select [Done].

Each shared book on a file server must have a unique name. If the name you entered in the Shared Book Properties sheet is the same as an existing shared book, a message in the message area now asks if you want to *create a local instance* of the shared book. Select [NO], go back to step 4, type another name for your shared book, and repeat step 8.

If your shared book name is unique, the following message appears in your message area:

Confirm to create a new Shared Book. [YES][NO]

9. Select [YES] when this confirmation message appears.

Watch the message area for a series of messages that inform you of the steps in the process of creating a new shared book. In a moment, the new shared book icon appears in place of the Blank Shared Book icon.



The name you chose appears on the shared book. You have created both a remote shared book and a local copy on your workstation.

Adding documents to the shared book

Once you have created the shared book, you add documents to it. These documents can then be used by the other members of your group.



You use the continuing sample documents ★★LDO EX1★★ and ★★LDO EX2★★, which you copied to your desktop in chapter 1. If you skipped the earlier chapters of this training, copy ★★LDO EX1★★ and ★★LDO EX2★★ to your desktop at this time. The shared books training will still work, but since the samples do not include changes made in earlier chapters, what you see on your screen may not exactly match the illustrations.

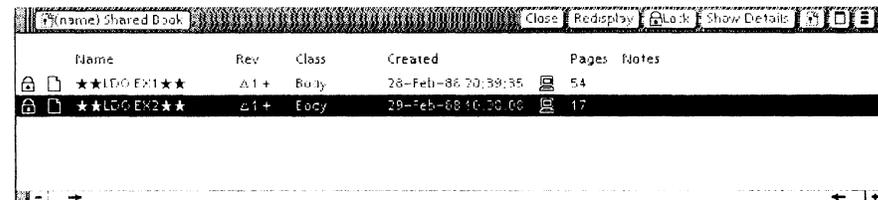
1. Select the shared book, and **press** <OPEN> to display the Shared Book window.



2. Select ★★LDO EX1★★, **press** <COPY>, and select anywhere inside the Shared Book window.
3. Select ★★LDO EX2★★, **press** <COPY>, and select below ★★LDO EX1★★ in the Shared Book window.

Watch the message area for a series of messages about adding a document to the shared book.

The documents are now in the remote shared book and also in the local copy of the shared book on your workstation.



Entry Documents and other VP objects that have been added to the shared book are called **entries**.



The heavy black lock means the entries are locked by you. No one else can change them until you unlock them.



A light gray lock means that an entry is locked by another user. You cannot edit an entry (ViewPoint document) that is locked by another user; however, you can open and read it. This lock does not appear during this training exercise, but it does appear during the optional exercise for two users.



The tiny workstation icon means that there is a local copy of the entry on your workstation.

Lock Notice that the two sample documents you copied into the shared book are **locked** by you.

Unlocking entries

While the entries are locked by you, other users can only read them. If you want to make these entries available for use by the other members of your group, you must *unlock* them.

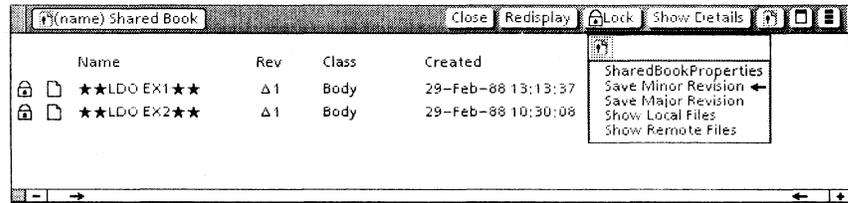
1. **Select** outside the Shared Book window.

This removes the selection from any entry within the window.

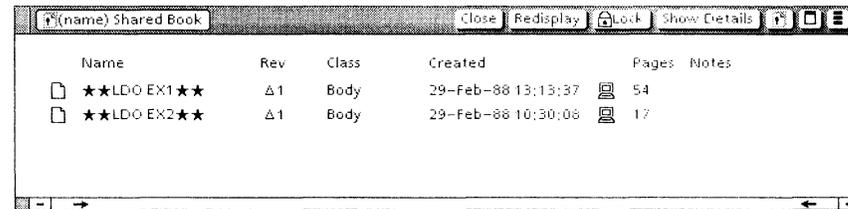
2. **Select** the Shared Book auxiliary menu in the header of the Shared Book window.



3. **Select** [Save Minor Revision] from the Shared Book auxiliary menu to unlock the two entries.



In a moment, the tiny lock icons are gone from both entries. The entries are no longer locked.



When the entries are unlocked, they are available to other members of your group for editing.

Performing basic Shared Books operations

You perform most Shared Books operations from within the Shared Book window.

Changing entry classifications

You use the Shared Book Entry Details option sheet to change the class of the entry (from body to auxiliary or vice versa), to leave notes about the entry or a reason for locking it (for the other users), and to change the access rights of the entry.

Body entry *Body entries* are text and graphics that you want included in the final publication. Only body entries are included when you paginate, generate an index or table of contents, or print the entire (closed) shared book. [Body] is the default.

Auxiliary entry *Auxiliary entries* are supporting documents, like a project schedule or correspondence, that you do not want included in the final publication.

The shared book is *closed* when the Shared Book window is closed. You use the *closed shared book* when you want to perform operations like pagination and printing on the body entries only.

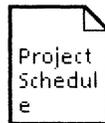
The shared book is *open* when the Shared Book window is open. You use the *open shared book* when you want to edit and save entries or perform operations like pagination and printing on auxiliary entries and some of the body entries.

Access list and access rights You also use the Shared Book Entry Details option sheet to change the **access list** and **access rights** for the entry. You use the Shared Book property sheet to change the access list and access rights for the shared book.

Access rights are not covered in the training guide. If you would like to know more about them, refer to the *Workstation Administration and System Resources Reference* volume. You may want to experiment with the practice shared book before you set up access rights for the shared book you will use in your work.

Using auxiliary entries

Auxiliary entries in a shared book are normally documents not intended for publication or final copy. You create such an entry now.



1. **Copy** a Blank Document icon to the desktop, and **rename** it "Project Schedule."
2. **Move** Project Schedule to the first position in the shared book.

Name	Rev	Class	Created	Pages	Notes
Project Schedule	Δ1	Body	24-Feb-88 18:30:40	4	
★★LDO EX1★★	Δ1	Body	23-Feb-88 13:13:37	54	
★★LDO EX2★★	Δ1	Body	23-Feb-88 10:30:08	17	

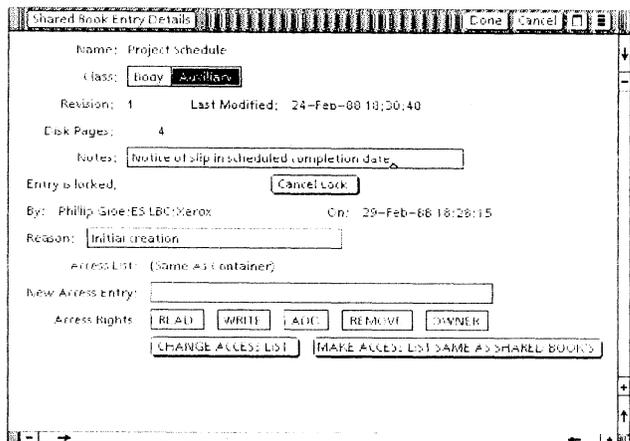
3. **Select** Project Schedule in the Shared Book window, and **select** [Show Details] in the window header.

This opens the Shared Book Entry Details option sheet.

Shared Book Entry Details	
Name:	Project Schedule
Class:	Body Auxiliary
Revision:	1
Last Modified:	24-Feb-88 18:30:40
Disk Pages:	4
Notes:	
Entry is locked:	<input type="checkbox"/> Cancel Lock
By:	Phillip Lane-Hester (Xerox) On: 20-Feb-88 18:28:15
Reason:	Initial creation
Access List:	(Same As Container)
New Access Entry:	
Access Rights:	<input type="button" value="READ"/> <input type="button" value="WRITE"/> <input type="button" value="ADD"/> <input type="button" value="REMOVE"/> <input type="button" value="OWNER"/>
	<input type="button" value="CHANGE ACCESS LIST"/> <input type="button" value="MAKE ACCESS LIST SAME AS SHARED BOOK'S"/>

The entry is locked. If it were not, you would need to lock it before making changes to the Shared Book Entry Details option sheet.

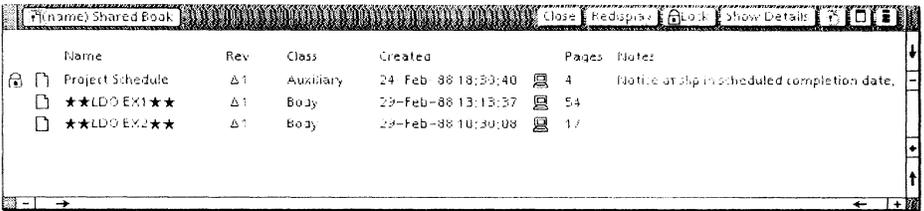
4. **Select** [Auxiliary] to change the class of the entry.
5. **Type:** Notice of slip in scheduled completion date. in the Notes field.



WARNING: Do not attempt to change the access list or access rights until you read and understand the section titled "Access control" in the *Workstation Administration and System Resources Reference* volume.

6. Select [Done].

The changes to the project schedule entry are reflected in the Shared Book window. Notice that the entry is locked. It remains locked to other users until you unlock it.



Locking and editing an entry

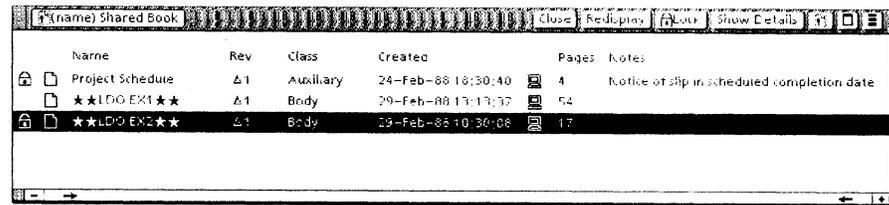
Before you can edit an entry, you must lock it. You lock an entry *before you open it*. Locking prevents two users from editing a *ViewPoint document* entry at the same time. Once you have locked the entry, you have exclusive use of it until you unlock it.

Note that you can edit an unlocked mailnote, but you cannot save the edited version of the unlocked mailnote. You cannot change the remote entry unless it is locked by you.

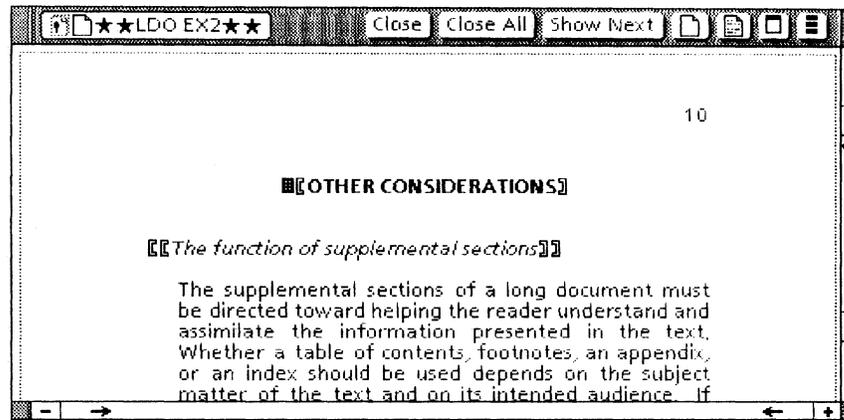
The easiest way to lock an entry is by using [Lock] in the Shared Book window header.

1. Select the third entry (★★LDO EX2★★).
2. Select [Lock] in the header of the Shared Book window.

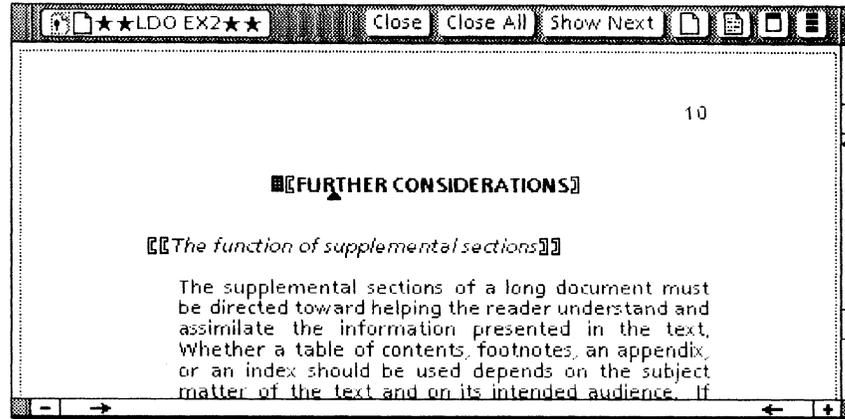
You must lock the entry before you can edit it or perform other Shared Books operations on it.



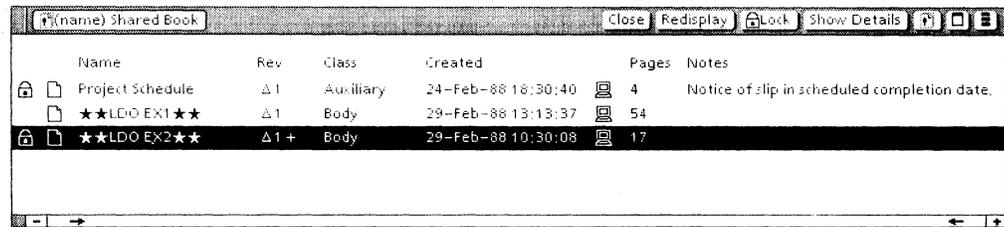
3. Open ★★LDO EX2★★, and select [Edit], if necessary.



4. Change the heading "OTHER CONSIDERATIONS" to "FURTHER CONSIDERATIONS."



5. Select [Close].



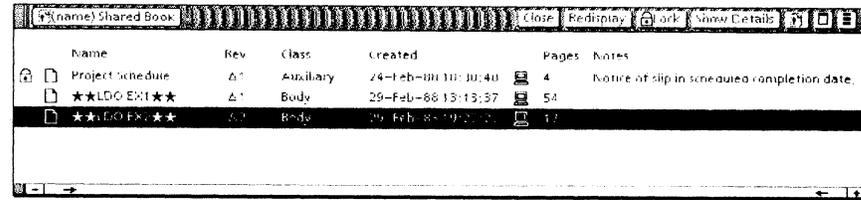
- + sign The + *sign* after the revision number in the Shared Book window means that the entry has been edited, but has not yet been saved to the remote shared book.
- △ The *small triangle*, a delta symbol, means “change.” Read it as “change 1” or “change 2.”

Saving and unlocking an entry

Once you have edited the entry, you want to save it to the remote shared book to make your changes available to the other users. Saving an entry stores it in the remote shared book and unlocks it.

1. Select ★★LDO EX2★★ (if it is not already selected).
2. Select [Save Minor Revision] in the Shared Book auxiliary menu.

In a moment, the entry that you edited (★★LDO EX2★★) is saved to the remote shared book.



Name	Rev	Class	Created	Pages	Notes
Project Schedule	Δ1	Auxiliary	24-Feb-00 11:30:40	4	Notice of slip in scheduled completion date.
★★LDO EX1★★	Δ1	Body	29-Feb-88 13:15:37	54	
★★LDO EX2★★	Δ2	Body	29-Feb-88 19:02:00	17	

Notice that the + sign is gone, and the revision number has been updated.

You can also use [Save Minor Revision] to unlock entries that you have not edited, as you did at the start of this exercise.

Deleting an entry

From time to time you may want to remove an entry from the shared book.

1. Select the first entry (Project Schedule).

An entry must be locked before you can delete it. Verify that the selected entry is still locked, and then continue.

2. Press <DELETE>.

3. Select [YES] when the confirmation message appears in the message area.

The entry disappears from the Shared Book window. It is deleted both from your local copy of the shared book and from the remote shared book.

4. Select [Close] in the Shared Book window header.

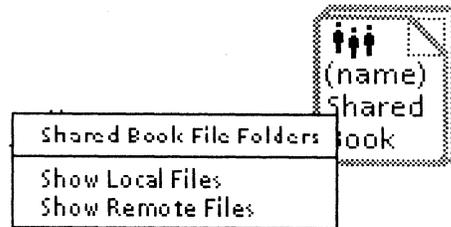
Using the Shared Book pop-up menu

Pop-up menu The Shared Book *pop-up menu* lets you view the remote shared book and the local copy of the shared book that is on your workstation. This is especially useful whenever you cannot open

the shared book because, for example, the Librarian Service is temporarily unavailable for some reason.

1. **Move** the pointer to the closed Shared Book icon.
2. **Press and hold down** both mouse buttons on the closed shared book.

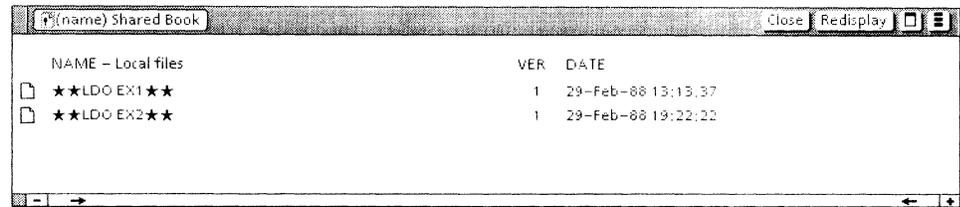
The Shared Book pop-up menu appears.



3. **Select** [Show Local Files].

The folder of local files window appears.

4. **Press and hold down** both mouse buttons on the closed shared book again (you may have to move or resize the local files window to do this).
5. **Select** [Show Remote Files].
6. **Position** the remote files folder window and the local files folder window so that you can see both at the same time on your desktop.



NAME - Remote files	VER	DATE
★★LDO EX1★★	1	29-Feb-88 13:13:37
★★LDO EX2★★	1	29-Feb-88 10:30:08
★★LDO EX2★★	2	29-Feb-88 19:22:22

7. Compare the two windows.

Notice that the remote file folder contains two versions of ★★LDO EX2★★, the entry you edited, and that the local file folder contains only one version.

The folder of *local files* contains only those entries that have local copies on your workstation.

The folder of *remote files* contains the entire contents of the remote shared book, including previous versions of the entries.

You can copy entries from either of these folders to your desktop. Try it, if you like. However, you *cannot* copy documents from your desktop into these folders, or from one folder to the other.

Refer to the *Workstation Administration and System Resources Reference* volume for information about when and how to use these folders.

8. Close both folder windows.

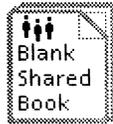
Deleting your local copy of the shared book

You can delete your local copy of the shared book to free up disk space on your workstation. Always save and unlock entries you have edited before you delete your local copy of the shared book.

1. **Select** the closed shared book.
2. **Press** <DELETE>.
3. **Select** [YES] to confirm, if necessary.

The local copy of the shared book is deleted from your workstation. This does not affect the remote shared book, which is still on the remote file server.

Retrieving a copy of an existing shared book



You use almost the same procedure to retrieve an existing shared book as you used to create a new shared book.

1. **Open** the Basic Icons folder, and **copy** the Blank Shared Book icon to your desktop.
2. **Select** the Blank Shared Book icon, and **press** <PROP'S> to open the Shared Book Properties sheet.

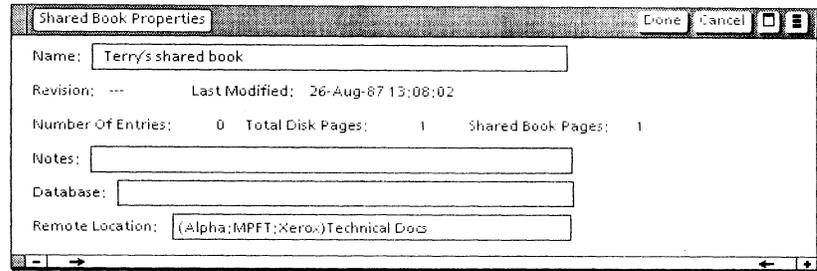
A screenshot of a dialog box titled "Shared Book Properties". It has a "Done" button and a "Cancel" button in the top right corner. The dialog contains several fields: "Name:" with the text "Blank Shared Book"; "Revision:" followed by "Last Modified: 26-Aug-87 13:08:02"; "Number Of Entries: 0 Total Disk Pages: 1 Shared Book Pages: 1"; "Notes:" with an empty text box; "Database:" with an empty text box; and "Remote Location:" with an empty text box. There are scroll bars on the right and bottom edges of the dialog.

3. **Delete** "Blank Shared Book" from the Name field.
4. **Type:** in the Name field the name of the shared book you created earlier.
Refer to the section titled "Creating a new shared book," if necessary, for the shared book name you used. Type the name exactly as when you created the shared book.
5. **Type:** the pathname of the file drawer where the shared book is stored in the Remote Location field.

Refer to the section titled "Creating a New Shared Book," if necessary, for the pathname you used.

You do not need to type in the name of the Librarian data base.

The following illustration is an example of how the property sheet should look. Yours will have a different name and database.



6. Select [Done].

If a message appears asking you if you want to *create a new shared book*, select [NO]. Go back to step 4, and retype the name of the shared book so that it matches exactly the name of the shared book when you created it. Be sure the pathname is also correct (step 5). Then repeat step 6.

If the name of the existing shared book is correctly entered, the following message now appears in your message area:

The Shared Book already exists on the File Server. Confirm to create a local instance of it. [YES][NO]

7. Select [YES] when this confirmation message appears.

In a moment, your shared book appears in place of the Blank Shared Book icon.



Using other VP Long Document Options applications on a shared book

Footnotes sequencing (through pagination), table of contents generation, and index generation can all be performed on a shared book icon much as they can on a book icon (as described in chapter 5). However, there are a few important differences you need to know. These concern auxiliary entries, and entries locked by another user.

First, when you paginate, generate a table of contents, or generate an index on a *closed shared book icon*, only the documents that are body entries will be used as subject documents. All auxiliary entries will be skipped.

Second, if any body entry is locked by another user, you will not be able to paginate, generate a table of contents, or generate an index on the closed shared book icon containing that locked body entry.

For more information on using these applications with a shared book icon, refer to the *Document Editor Options Reference* volume.

Deleting the remote shared book

When you delete the remote shared book, it is *removed from the file drawer without a trace*. Never delete a remote shared book unless you have a backup copy, or you and the other members of your group are certain that you will never need the information again.

You must delete the entries from the shared book *before* you delete the shared book from the file drawer.

1. **Open** the shared book.
2. **Lock** and **delete** all the entries from the Shared Book window.
3. **Close** the Shared Book window.
4. **Open** the remote file drawer where the shared book is stored.
5. **Select** the shared book in the file drawer window, **press** <DELETE>, and **confirm**.
6. **Close** the file drawer.
7. **Delete** the local copy of the shared book from your desktop.

Sharing a shared book: Optional exercise for two users



You now use a shared book with a coworker. It may be helpful for you and your coworker to coordinate your activities, either in person, if you are in the same room, or by telephone.

Using a shared book with another person is more complicated than using a shared book by yourself. Although the steps in this exercise are broken into smaller sections, they represent one progressing example, and you need to go through them in sequence.

One of you should follow the steps for User A and the other for User B.

Creating a shared book and adding entries

- User A 1. **Create** a new shared book.
- User B 2. **Retrieve** the shared book.
- User B 3. **Open** the shared book.
- User B 4. **Add** the two training documents, ★★LDO EX1★★ and ★★LDO EX2★★.
- User A 5. **Open** the shared book.
- User A 6. **Add** two short ViewPoint documents from your desktop.
- User B 7. **Redisplay** the Shared Book window to show the two new entries.

Looking at a locked Shared Book Entry Details option sheet

The shared book now contains four entries. Two are locked by User A and two are locked by User B. Notice the tiny lock icons are black or gray, depending on who locked the entries.

User A 1. **Select** one of the entries locked by User B (the gray lock), and **select** [Show Details] to open the Shared Book Entry Details option sheet.

User B 2. **Select** one of the entries locked by User A (the gray lock), and **select** [Show Details] to open the Shared Book Entry Details option sheet.

Notice that all the information on the Shared Book Entry Details option sheet is read-only and that the name of the person who locked the entry appears, along with the date and time the entry was locked. The contents of the Shared Book Entry Details option sheet change, depending on whether the entry is locked and who locked it. Compare this Shared Book Entry Details option sheet with the one illustrated in the previous exercise.

Users A and B 3. **Select** [Done] in the Shared Book Entry Details option sheet window header.

Changing the class of an entry

When you are working on entries that are on your workstations, you can both use the shared book at the same time because you are really working on your own local copies of the entries.

Users A and B 1. **Select** one of the entries that is locked by you (the black lock), and **select** [Show Details] to open the Entry Details option sheet.

Users A and B 2. **Change** the class of the entry to [Auxiliary], and **select** [Done] to close the Shared Book Entry Details option sheet.

Users A and B 3. **Redisplay** the Shared Book window to show that the class of the entries was changed.

Editing, saving, and unlocking entries

Users A and B 1. **Select** the body entry that is locked by you, **open** it, **make** a small change, and **close** it.

- Users A and B** 2. **Redisplay** the Shared Book window to show that the entries have been updated but not saved.

The Shared Books application allows operations that access the remote shared book to occur only one at a time. For example, if two users try to save their entries at the same time, one user gets “control” of the shared book, while the other user gets a message saying the shared book is “in use.” If you both try to save your entries at about the same time, one of you may get this “in use” message.

- Users A and B** 3. **Save** the edited entry to the remote shared book.

- Users A and B** 4. **Redisplay** the Shared Book window to show that the entries have been saved and unlocked.

Locking entries

You can read (open) an entry (ViewPoint document) that is locked by another user, but you cannot edit it. When you open an entry that is not on your workstation, it is automatically retrieved for you.

- User A** 1. **Open** the body entry that is locked by User B, **try** to edit it, and then **close** it.

- User B** 2. **Open** the body entry that is locked by User A, **try** to edit it, and then **close** it.

Two users cannot lock the same entry at the same time. One user will get control, and the other user will get the “in use” message.

- Users A and B** 3. **Select** the first unlocked entry, and **lock** it.

You both should be trying to lock the same entry.

- Users A and B** 4. **Redisplay** the Shared Book window, if necessary, to show that the entry is now locked.

One user will have a black lock for the entry. The other will have a gray lock.

Printing entries in an open shared book

Some operations behave differently, depending on whether the shared book is open or closed.

- When the shared book is *open*, you can paginate or print both body and auxiliary entries that you select.
- When the shared book is *closed*, all the body entries are paginated or printed and the auxiliary entries are not paginated or printed.

Locking affects pagination and printing also.

- Before you paginate or print an *open* shared book, be sure that none of the entries you select is locked by another user. If a selected entry in an open shared book is locked by another user, the operation terminates when that locked entry is reached and you get partial results (only the entries preceding this locked entry are paginated or printed).
- Before you paginate or print a *closed* shared book, be sure that none of the body entries is locked by another user. If a body entry in a closed shared book is locked by another user, the operation terminates immediately and you get no results at all.
- These operations leave all affected entries locked by you. You must unlock them so that other users can use them.

- Users A and B** 1. **Unlock** any entries that you have locked.

You can use [Save Minor Revision] to unlock entries that have not been edited.

- User A 2. **Select** a block of three entries in the open Shared Book window (be sure you have included at least one body entry and at least one auxiliary entry in the selection).

Remember which entries you selected.

- User A 3. **Select** [Paginate] from the desktop auxiliary menu.

- User A 4. **Copy** the repaginated entries to the printer, and **select** [Start].

When printing is completed, User A should have printed copies of the three entries that were selected. The pagination and printing operations lock the selected entries.

- User A 5. **Unlock** all the entries so that User B can continue the exercise.

- User A 6. **Close** the shared book, and **delete** your local copy of the shared book.

User A has now completed the exercise.

Printing a closed shared book

- User B 1. **Redisplay** the Shared Book window to be sure that all the entries are unlocked.

- User B 2. **Close** the Shared Book window.

- User B 3. **Copy** the closed shared book to the printer, and **select** [Repaginate] and [Start].

When printing is completed, User B should have printed copies of the two body entries only. The pagination and printing operations lock all the body entries.

Deleting the remote shared book

- User B 1. **Delete** the remote shared book.

Other features of Shared Books

Some of the other features of Shared Books that are not covered in this training guide are the following:

- You can number the pages of the closed shared book (body entries only) or number the pages of individual entries in the open shared book.
- You can paginate the closed shared book (body entries only) or paginate individual entries in the open shared book.
- You can generate an index or table of contents for body and auxiliary entries in an open shared book; you get one index or table of contents for each entry selected.
- You can generate an index or table of contents for the closed shared book; you get one index or one table of contents for the entire shared book and only body entries are included.
- You can keep several revisions of the entries in the remote shared book.

Refer to the *Workstation Administration and System Resources* volume for more information.

You have now completed the VP Long Document Options training. You should now be able to use footnotes, The Index Generator, and the table of contents generator on your own documents, books, and shared books.

Refer to the appropriate volumes of the reference library for more information.

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