

# DEXembed User's Guide

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All of the examples, tips, and tutorials in this Guide are based on the use of SKY Index indexing software to illustrate the process of embedding with DEXembed. To duplicate any of the described SKY Index functions in CINDEXTM or MACREXTM, please consult their documentation or technical support.

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# 1 About DEXembed

DEXembed is a Microsoft Word add-in created specifically to meet the needs of indexers who use standalone indexing programs (such as SKY Index, CINDEK, and MACREX), and who need to embed index tags in Microsoft Word documents. Originally part of its parent program, DEXter, it has been split off as a separate program and further developed to take into account the variety of workflow situations that arise in the real world of embedded indexing as required by different publishers.

## 1.1 DEXter vs. DEXembed

**DEXter** is a Word add-in that embeds index entries in a Word document after the indexer has created the entries in a customized table *in Microsoft Word*. (DEXter is analogous to IXgen for FrameMaker.)

**DEXembed** is a Word add-in that embeds index entries in a Word document after the indexer has created the entries *in a standalone indexing program* such as SKY Index, CINDEK, or MACREX (or any other program that can export a tab-delimited text file).

## 1.2 Special Features

DEXembed was developed in an actual indexing environment. It was designed to accommodate the various workflows and processes employed by publishers who import embedded Microsoft Word documents into layout programs such as QuarkXPress, Framemaker, and InDesign. DEXembed accounts for the differences in these processes by incorporating a number of unique features:

- **Locator Variety.** A document may be indexed using locators that correspond to page numbers, paragraph numbers, or precise word placements. These locators are then used to embed the index tags.
- **Printed Pages or On-Screen.** Indexing can be done from printed pages or exclusively on-screen.
- **Bookmarks Are Optional.** Embedded tags can be produced with or without Microsoft Word bookmarks. (Bookmarks are used by Word to define *ranges* in index tags. In general, publishers do not want bookmarks in files that will be imported into a layout program.)

- **Automated Coding of Ranges.** Instead of bookmarks, ranges can be marked with codes chosen by the publisher or indexer. DEXembed automates the process of creating beginning and ending range entries, adding the codes to those entries, and then embedding the coded entries as Word index-entry fields—in one step.

- **Removal of Old Index Tags.** DEXembed can strip out all previously embedded index-entry fields in a single automated action—often used when a final edit dictates re-embedding all the individual chapter files (if they are available) or removing old index-entry fields from a previous version of the book.

- **Automated Final Edit Cleanup.** At the end of the indexing process, the indexer often receives a Quark- or Frame-generated index (as a Microsoft Word file) with final pagination, and must then carry out a final edit. DEXembed provides two useful features to help with this editing process:

1. The final generated index will usually contain range codes still appended to the tagged range entries. DEXembed will properly combine the range page locators and then delete the range codes. (Some publishers may have their own system to combine the locators and remove the range codes in the layout program prior to generating the index.)
2. When the indexer receives the index (as a Word file) back from the publisher for editing, updating, or revising, DEXembed can properly style the index and convert it to a standalone table (.dat file) that can then be imported back into SKY Index, CINDEXT, or MACREXT for final editing.

## 2 Installing or Uninstalling

DEXembed is a collection of macros in a template. You don't use the template as you would an ordinary one by attaching it to a document. If you try to do that, you'll run into problems. Instead, you "add" it to Microsoft Word as a global template or add-in (see the installation instructions below).

Because the template contains macros, some virus-checking programs or even Word itself may warn you that the template could contain Word viruses. Please rest assured that it does not. The macros have been carefully checked and tested to make sure they are safe and usable. To ensure your security, you should download the program directly from the Editorium website at [www.editorium.com](http://www.editorium.com).

Please do not rename any of the DEXembed macros, copy them to another template, or remove them from the DEXembed template. DEXembed uses these macros in combination and won't work properly if they have been copied to another template or renamed, or if some of the macros are no longer present.

### 2.1 Installing DEXembed

To install the program (**please read carefully**):

1. *Unzip (or unstuff) the program files* so that they're all together in a single folder or on your desktop. (If you need software to unzip or unstuff the program, you can download it from [www.winzip.com](http://www.winzip.com) or [www.aladdinsys.com](http://www.aladdinsys.com).) You *cannot* install the program by just *opening* the zip file and double-clicking one of the files. Most likely, however, you can open the zip file and drag the files out to your desktop.
2. After the files are unzipped, open the file named "Install DEXembed.dot" in Microsoft Word by clicking **File > Open**, selecting the file, and clicking the **Open** button. *Do not open the file by double-clicking it outside of Microsoft Word.* If you do, you'll run into problems later.
3. If Word asks if you want to "enable macros" when opening the file, your answer should be yes. Otherwise, the program won't work. *If Word tells you that the macros have been disabled*, you'll need to change your macro security settings and then restart Word before installing. Please see the "Troubleshooting" section at the end of this document for instructions.
4. Double-click the large button that says "Double-Click here to Install." This will install DEXembed as a global template or add-in, which

simply means that the program will be saved to Word's Startup folder and will thus be available any time you start Word.

5. Restart Word to activate the program and display the DEXembed menu at the top of your Word window. In Word 2007, the menu will be displayed under Word's "Add-ins" menu.

If that doesn't work, you can install DEXembed manually. With Microsoft Word closed:

1. On your computer desktop, double-click My Computer. (On a Macintosh, open your hard drive. Then continue with step 5, below.)
2. At the top of the window that opens, you'll see a "Tools" menu. Click that, and then click "Folder Options."
3. Click the "View" tab and make sure that "Show hidden files and folders" is selected. Then click the OK button.
4. Back in the window for "My Computer," double-click your local hard drive, probably "C."
5. Open the folders named, consecutively within each other, Documents and Settings > [your name] > Application Data > Microsoft > Word > Startup. (On a Macintosh, open Applications > Microsoft Office > Office > Startup > Word.)
6. Put the file named "DEXembed.dot" into the Startup folder (on a Macintosh, into the Startup > Word folder).
7. Restart Microsoft Word.

## 2.2 Uninstalling DEXembed

To uninstall the program:

1. Open the file named "Install DEXembed.dot" in Microsoft Word by clicking **File > Open**, selecting the template, and clicking the **Open** button. *Do not open the file by double-clicking it outside of Microsoft Word.* If you do, you'll run into problems later.
2. If Word asks if you want to "enable macros" when opening the file, your answer should be yes. Otherwise, the program won't work. If Word tells you that the macros have been disabled, you'll need to change your macro security settings in order to use the program. Please see the "Troubleshooting" section of this documentation for instructions.
3. Double-click the large button that says "Double-Click here to Uninstall."

If necessary, you can remove the template manually from Word's Startup folder:

1. On your computer desktop, double-click My Computer. (On a Macintosh, open your hard drive. Then continue with step 5, below.)
2. At the top of the window that opens, you'll see a "Tools" menu. Click that, and then click "Folder Options."
3. Click the "View" tab and make sure that "Show hidden files and folders" is selected. Then click the OK button.
4. Back in the window for "My Computer," double-click your local hard drive, probably "C."
5. Open the folders named, consecutively within each other, Documents and Settings > [your name] > Application Data > Microsoft > Word > Startup. (On a Macintosh, open Applications > Microsoft Office > Office > Startup > Word.)
6. Remove the file named "DEXembed.dot."
7. Restart Microsoft Word.

### 3 Quick-Start

Here, in a nutshell, are the basic steps in embedding an index using DEXembed. These are *not* the complete instructions, but they are included here to give you a quick idea of the overall process. You should try working through these steps with a short test document before trying DEXembed's more advanced features.

1. In Microsoft Word, click **DEXembed > DEXembed Options**.
2. Under "For locators, use," select "Paragraph numbers." Then click the OK button.
3. Open the document into which you want your entries to be embedded.
4. Click **DEXembed > Prepare Document > Add Paragraph numbers**.
5. *Using the paragraph numbers as locators*, create a brief test index in your standalone indexing program (SKY Index, CINDEXT, or MACREXT).
6. Export the index (using **File > Export**) as a tab-delimited text (.txt) file (Be sure to *uncheck* "Enclose fields within quotes.")
7. In Microsoft Word, open the text file (using **File > Open**) that you exported from your indexing program. You should now have two documents open in Word: (1) your text file and (2) the document with paragraph numbers. (Alternatively, you can use the original document without paragraph numbers. If you do, skip step 8, just below.) *The text file must be the active document—that is, the window on top where your cursor is placed.*
8. Click **DEXembed > Prepare Document > Remove Paragraph numbers**.
9. Click **DEXembed > Embed from Tab-Delimited File** and respond to any prompts displayed on your screen.
10. Click **DEXembed > View > Show Index Tags** to see the embedded tags in your Word document.

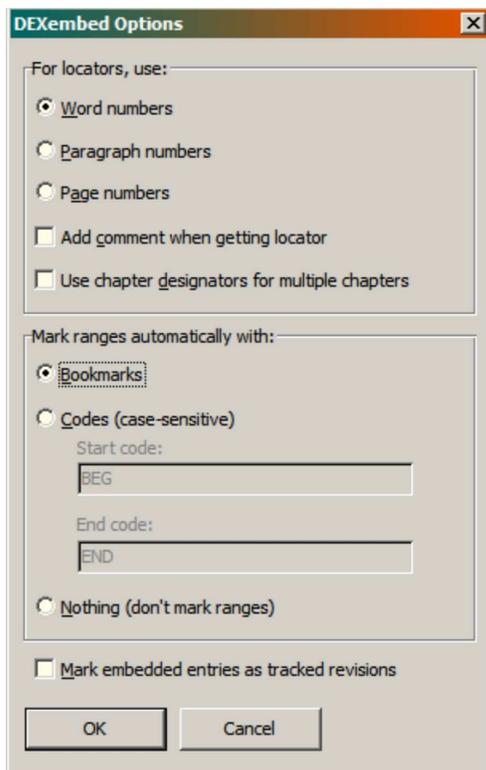
## 4 Menus and Features

After DEXembed is properly installed, you'll see a DEXembed menu at the top of your Microsoft Word window (along with other menu items such as File, Edit, View, and so on). In Word 2007, it should appear on the Add-Ins tab. Click the DEXembed menu to see and use the features included with DEXembed. These features are explained in this chapter.

If some of the features aren't visible on the menu, it's because Microsoft Word is "helpfully" hiding them until you need them. You can get around this by double-clicking the DEXembed menu to open it, thus displaying all of the menu entries.

### 4.1 Set DEXembed Options

Set DEXembed Options is first on the menu because of its importance; you'll use this feature to control how several other features work. DEXembed will remember the options you select as the default.



### 4.1.1 “For locators, use: . . .”

For locators, you can use word numbers, paragraph numbers, or page numbers in your standalone indexing software, such as SKY Index. The type of locator you choose here will be reflected in other program features, such as “Get Locator,” “Find Locator,” and “Embed from Tab-Delimited File.”

If you select “Add comment when getting locator,” and you use DEXembed to get a locator from selected text in your reference document, then a Microsoft Word comment showing the locator will be placed in the document.

**Comment [JML1]:** Like this one.

“Require chapter designators for multiple chapters” allows you to embed from a *single* SKY index file into *multiple* Word documents. If you want to do this, you *must* include a 2-digit chapter designator at the beginning of each locator or range in the Sky file, like this:

Washington, George      03.250-257

Here, “03” is the chapter designator. The index would also include entries for other chapters:

Valley Forge      04.12-13, 05.17  
Cherry tree, story of      07.31-32

For the embedding to work properly, the name of the file into which such an entry is to be embedded must also begin with the corresponding 2-digit chapter designator. In this example, the corresponding chapter files might be named like this:

03.Early\_Life.doc  
04.Valley\_Forge.doc  
07.The\_Presidency.doc

The point of all this is that it allows you to build an index of the entire book in your standalone indexing program even though the Word chapters to be embedded are separate documents.

**Note:** If you have an entire book in one document, you won’t need this feature and therefore should not include chapter designators in your locators or filenames.

For more on locators, see the chapter titled “Locators.”

## 4.1.2 “Mark ranges automatically with: . . .”

Use these options to have DEXembed mark ranges when it embeds your entries.

### 4.1.2.1 *Automatically Named Bookmarks*

The “Bookmark” option marks a range of text by applying an automatically named Microsoft Word bookmark to that text. Then if you or your client need to generate the index in Word, the word processor will display page ranges in the index. Bookmarks are, in fact, Microsoft Word’s way of determining page ranges. If the Word file and its entries will be imported into a typesetting program such as QuarkXPress, FrameMaker, or InDesign, you should not, in most cases, use this option.

### 4.1.2.2 *Codes*

If you mark ranges with codes, DEXembed will embed *each* entry *twice*, one with the beginning range code and the other with the ending range code you specified under **DEXembed > Set DEXembed Options**, and in the locations indicated by your chosen locators (usually paragraph numbers). This is primarily used when your embedded Word documents will be imported into a typesetting program, such as QuarkXPress, InDesign, or FrameMaker, which do not easily accommodate page ranges. When the compositor finalizes the pagination and generates the index, it will (and should!) include all those doubled entries and range codes. But never fear—you can then use DEXembed to remove the extraneous material from the final index, leaving single entries with their proper locator ranges (by clicking **DEXembed > Modify Existing Index > Combine Coded Ranges**).

### 4.1.2.3 *Nothing*

If you like, you can tell DEXembed not to mark ranges at all. In this case, the program will simply embed each entry at the location of the first specified locator. For example, this entry (using paragraph numbers) would be embedded in paragraph 230:

Washington, Martha      230-232

For more on ranges, see the chapter titled “Ranges.”

### 4.1.3 Mark Embedded Entries as Tracked Revisions

Microsoft Word includes the ability to “track” revisions made to a file, usually marking additions in blue and deletions in struck-out red. Selecting this option means that all embedded entries will be marked as added revisions. This provides the advantage of showing the embedded entries in a different color than the surrounding text. However, part of the point of using DEXembed is to avoid having to deal with Word’s embedded XE (index) tags directly, so for much of your work you may not need this feature.

## 4.2 Embed from Tab-delimited File

This feature is DEXembed’s reason for being. The program first collects the entries from a tab-delimited text file exported from a standalone indexing program. Then it embeds those entries into Word documents based on the locators in the tab-delimited file and the locator specified under **DEXembed > Set DEXembed Options**.

## 4.3 Prepare Document

Use these features to prepare a document for indexing:

### 4.3.1 Add Paragraph Numbers

This feature adds the paragraph number—in bold, red, underlined (dotted) text—at the beginning of each paragraph. This allows you to identify a paragraph locator simply by looking at it, and you can then type that locator into your indexing program. If you like, you can print the document with the locators and then work from paper as you index rather than working from an on-screen reference document.

### 4.3.2 Remove Paragraph Numbers

Don’t want those paragraph numbers anymore? Use this feature to remove them.

### 4.3.3 Remove Embedded Entries

Use this feature to remove index entries that were previously embedded in a document.

### 4.3.4 Remove DEXembed Bookmarks

If you've marked ranges with Word bookmarks using DEXembed, this feature removes them but leaves other bookmarks intact.

### 4.3.5 Remove Locator Comments

If you've had DEXembed add comments while you were automatically getting locators from a reference document, this feature removes them but leaves other comments intact.

### 4.3.6 Combine Documents

This feature combines all the documents in a folder you specify into a single new blank document (which *you must create* before using this feature) . The documents are combined *in alphabetical order*, so if your documents are named like this—

1chapter  
2chapter  
3chapter

—you'll run into problems if other chapters are named like this:

10chapter  
11chapter  
12chapter

Why? Because they'll sort alphabetically like this:

1chapter  
10chapter

Oops. The solution is to name the single-digit chapters like this:

01chapter  
02chapter  
03chapter

*Note:* When the folder is opened, no files will appear, but don't worry about that. Simply click Open, and the files in the folder will be combined. The folder must contain *only* the files to be combined and *no others*.

### 4.3.7 Split Document

This feature splits an existing document into automatically named separate files, based on any manual page breaks that have been previously inserted into the document (via **Ctrl + Enter**). The resulting new documents will be stored in the same folder as the original document.

## 4.4 Set StartOfTopic Bookmark

If you're using DEXembed to automatically obtain locators from a reference document, you can let the program select text for you. To do so:

1. In a reference document, place your cursor at a point that marks the beginning of your selection.
2. Click **DEXembed > Set StartOfTopic Bookmark** (or press **Ctrl + Alt + M**), which will insert a bookmark named StartOfTopic.
3. Move your cursor however you like as you read through your text.
4. When you get to a spot that seems like a good ending place for your selected text, put your cursor there.
5. Click **DEXembed > Get Locator** (or press **Ctrl + Alt + L**).

DEXembed will automatically select the text—from the StartOfTopic bookmark to the position of your cursor—and place the range locators into the Clipboard (memory) for pasting into your indexing program. It will then delete the StartOfTopic bookmark so you can set it again in a new position.

## 4.5 Get Locator

This feature identifies and copies the locator for the currently selected text into the Clipboard (memory) so you can paste that information into the locator field of your standalone indexing software. The steps are:

1. In your reference document in Microsoft Word, select the text you want to index (a selection can be as large or as small as you want; even just placing your cursor somewhere in a document counts as a “selection”).
2. Click **DEXembed > Get Locator** (or press **Ctrl + Alt + L**).
3. Switch to your standalone indexing software.
4. Paste the locator into the appropriate locator field.

Note that the locator is based on the kind of locator (word, paragraph, or page) you previously selected under **DEXembed > Set DEXembed Options**.

## 4.6 Find Locator

If you copy the locator from an entry in your standalone indexing software, this feature will take you to that locator in your reference document in Microsoft Word. The steps are:

1. In your standalone indexing software, select a locator.
2. Copy the locator by pressing **Ctrl + C** (on a Macintosh, press **Option + C**).
3. Switch to your reference document in Microsoft Word.
4. Click **DEXembed > Find Locator** (or press **Ctrl + Alt + F**).

DEXembed will find and select the text that corresponds to that locator.

Note that the locator is based on the kind of locator (word, paragraph, or page) you previously selected under **DEXembed > Set DEXembed Options**. Also, if there is no locator in memory, DEXembed won't take you anywhere.

## 4.7 Go to Paragraph Number

This feature takes you to the paragraph you specify (by number) in your Microsoft Word reference document. To use it, press **Ctrl + Alt + P**.

## 4.8 Display Paragraph Number

This feature displays the number of the current paragraph (in which your cursor is placed) in your Microsoft Word reference document. To use it, press **Ctrl + Alt + N**.

## 4.9 View

### 4.9.1 Show Bookmarks

This feature displays bookmark ranges with light-gray square brackets at the beginning and end of each range.

### 4.9.2 Hide Bookmarks

This feature hides bookmark ranges.

### 4.9.3 Show Index Tags

This feature shows embedded Microsoft Word index markers (XE field codes).

### 4.9.4 Hide Index Tags

This feature hides embedded Microsoft Word index markers (XE field codes).

## 4.10 Generate Index from Embedded Entries

This feature generates the index at the end of the document, based on the embedded entries in the document. If, however, all you see is a code like this one—

```
{ INDEX \c "2" \z "1033" }
```

—don't panic. That code *is*, in fact, the index, but it's being displayed as a field code rather than the index text it represents. To solve the problem, click **Tools > Options** (on a Macintosh, click **Word > Preferences**), click the "View" tab, and remove the check from the box labeled "Field codes." Then click the OK button. Your index will appear.

If you change the document and need to regenerate the index, right-click anywhere in the index text, click "Update field," and follow the prompts.

If you need to turn the generated index text into *actual text* (no longer generated by a field and no longer updateable), put your cursor anywhere in the index text and press **Ctrl + 6**. You can then copy the index text (and *only* the index text; don't include any returns or breaks before or after the text) and paste it into a new document. Be sure to *save* the document using a different name before doing anything else with it (like trying to "round trip" it by converting it to a tab-delimited file for use in your indexing software).

## 4.11 Remove Generated Index

If you've generated an index to see what it looks like but then want to get rid of it, click **DEXembed > Remove Generated Index**.

## 4.12 Modify Existing Index

### 4.12.1 Combine Coded Ranges

If you've marked ranges with range codes, and you've received a generated index from the publisher that includes those codes, you can use this feature to delete the codes and combine the locators of the matching entries. If you're doing this with an index you've generated yourself in the Word document, be sure to convert the index into actual text before proceeding. To do so, put your cursor anywhere in the generated index. The index will turn gray, indicating that it's a field rather than actual text. Press CTRL + 6 to turn the generated index into actual text. Then you can combine coded ranges if necessary.

### 4.12.2 Fix Orphans

This feature combines lone subentries with their main entries. For example, this:

Apples  
in pie, 26

becomes this:

Apples, in pie, 26

### 4.12.3 Format Inclusive Locators

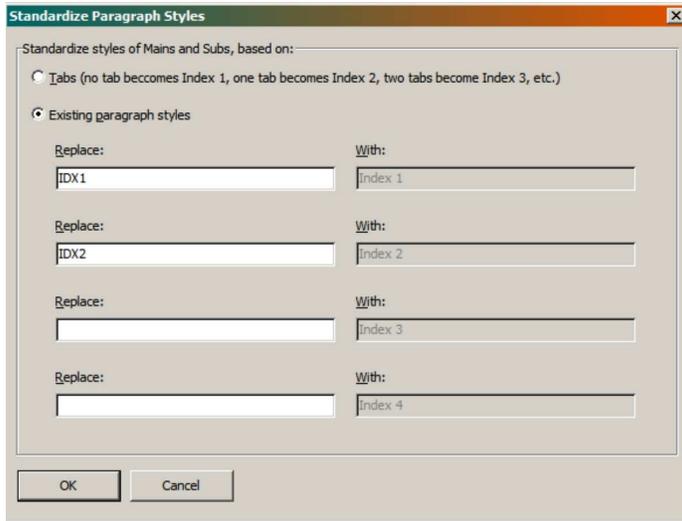
This feature puts inclusive locators (such as 212-214) into the style specified in *The Chicago Manual of Style* (212–14), including an en dash to separate the numbers.

### 4.12.4 Standardize Styles

This feature standardizes the paragraph styles used in an existing index. The main reason you might want to do that is so you can then convert that index into a tab-delimited file that can be imported into your standalone indexing software (see below).

To use the feature, identify the paragraph styles that are used for the different levels of an existing index. (You can see them on the left of Word's Formatting toolbar for the text where your cursor is placed.) Then enter the names of those styles in the boxes on the left. (The names of the styles are case sensitive, and

their spelling must be exact, including any spaces.) When you click the OK button, the existing styles will be changed to the default styles listed in the boxes on the right.



You can also convert tabbed indexes to styles: No tab represents a main entry, one tab represents a subentry, and so on.

#### 4.12.5 Convert to Tab-Delimited File

This feature converts a previously generated and formatted index back into a tab-delimited file that you can import into your standalone indexing software. For this to work, the index must be the *only* text in a Microsoft Word document, and it must be formatted with Microsoft Word's default index paragraph styles (Index 1, Index 2, and so on). If the index you need to convert isn't formatted with those styles, you can reformat it by clicking **DEXembed > Modify Existing Index > Standardize Styles** (see above).

As an example, let's say you have an existing, formatted index, one that looks something like this (run-in or indented, it doesn't matter):

- Adobe Acrobat, indexing files from, 51
- Angle brackets, in generated index, 47
- AutoCorrect, 58
- Bookmarks: counting, 16; upper limit on, 16; StartOfTopic, 19; displaying, 28, 37–38; tagging, 56
- Brackets, in generated index, 47

Capitalizing, headings, 24–25

But to import into a standalone indexing program, it needs to look like this, with tabs separating the parts of an entry:

Adobe Acrobat	indexing files from	51
Angle brackets	in generated index	47
AutoCorrect		58
Bookmarks	counting	16
Bookmarks	upper limit on	16
Bookmarks	StartOfTopic	19
Bookmarks	displaying	28, 37–38
Bookmarks	tagging	56
Brackets	in generated index	47
Capitalizing	headings	24–25

To make that happen (after backing up your original file), first convert the styles as described above. Then click **DEXembed > Modify Existing Index > Convert to Tab-Delimited File**. (Note that this feature isn't magic; it can't anticipate every possible variation in structure, which means it may not work correctly if your index has unusual formatting or other problems.)

DEXembed will put the tab-delimited entries into a new document, which it will save in text format with a “.dat” extension. Word will probably warn you that “Saving as a text file will cause all formatting, pictures, and objects in your file to be lost.” That's just as it should be, so click OK to save the file.

After the index has been deconstructed and the file saved, carefully check the tab-delimited entries against the original index to make sure the deconstruction was successful and accurate. Then save and close the file.

When you're finished, you can take a final step: In SKY Index select **File > Import**. In the “file types” dropdown menu, select CINDEX (\*.dat). Then navigate to where your .dat file is located, select it, and click Open. The index will flow into SKY Index, ready for you to perform your final edit.

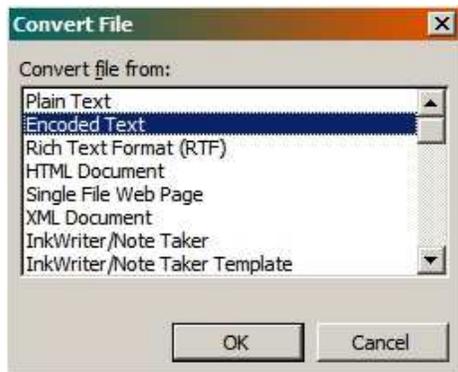
## 4.13 DocBook XML

The features under this menu make it possible to write an index in a standalone indexing program and then embed those entries in DocBook syntax into an XML document. They do this without messing up the existing DocBook tags, and *without* any conversion of the tags to Word formatting.

First, you'll need to open the XML file as plain text in Word, which is not easy unless you know the secret:

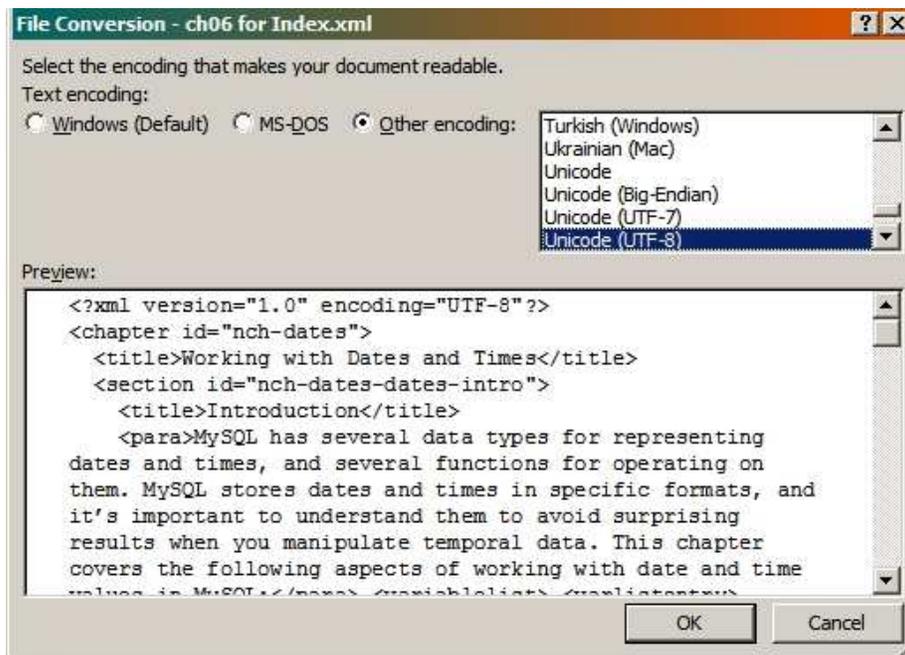
1. In Word, click **Tools > Options**. (In Word 2007, click the round Office button at the top left of your screen. Then click **Advanced > Word Options**.)
2. Click the General tab.
3. Put a check in the box labeled “Confirm conversion at Open.”
4. Click the OK button.

Now when you try to open an XML file, Word will ask you to confirm that you want to “Convert file from” XML, and it will show “XML Document” as the default selection. *Don't take it*. Instead, select “Encoded Text” and click OK.



If you don't, Word will display the XML tags in its own tagged format, which is *not* what you want. Converting as encoded text will bring the document into Word with all of the XML tags intact, which *is* what you want.

Next, Word will ask what encoding you want to use. Just click OK to accept the default encoding of Unicode (UTF-8).



Once you have the document open in Word, with the XML tags showing, do *not* try to save the file. DEXembed will take care of that as you use the following features to create and embed your index entries.

### 4.13.1 Add Paragraph Numbers to DocBook File

To use this feature, click **DEXembed > DocBook XML > Add Paragraph Numbers to DocBook File** (not to be confused with DEXembed > Prepare Documents > Add Paragraph Numbers). This feature does several things:

1. It removes carriage returns in any text between paragraph tags:

```
<para>like¶  
this</para>
```

2. It removes carriage returns from any text *within* any kind of tag:

```
<like¶  
this>
```

(Although such carriage returns won't actually hurt anything as far as XML is concerned, they'll wreak havoc when you're trying to index using paragraph numbers as locators—which, by the way, is the only type of locator DEXembed will use for DocBook indexing, and it does so automatically.)

3. It adds a paragraph number in front of each paragraph (except the first) in the form of an XML “comment,” so that the numbered paragraphs look like this in XML syntax (if you open the file in a text editor):

```
<?xml version=“1.0” encoding=“UTF-8”?>  
<!--2--><chapter id=“nch-dates”>  
<!--3--> <title>Working with Dates and Times</title>  
<!--4--> <section id=“nch-dates-dates-intro”>  
<!--5--> <title>Introduction</title>
```

4. It saves the document in UTF-8 encoding, adding “for Index” to the filename so that “MyChapter.xml” is saved as “MyChapter for Index.xml.” This newly saved file is the one you'll be using to embed your index, and it's the one you'll eventually return to your client. Do *not* use the original file, which will be left untouched in its original state.

5. It closes the document so you don't have to worry about how to save it in the correct encoding. You'll find the saved document in the same folder as your original XML file.

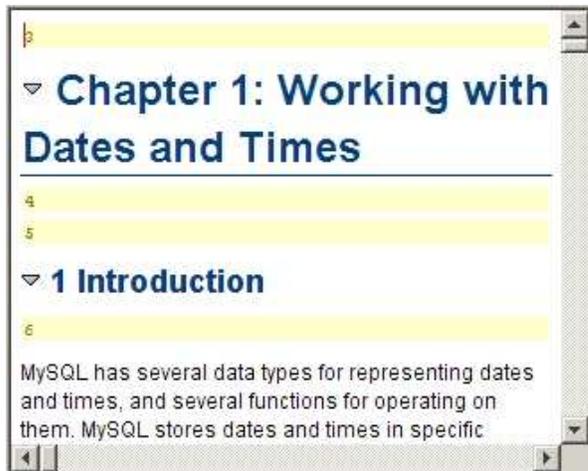
Now open the saved document (for example, "MyChapter for Index.xml") in a WYSIWYG XML editor, such as the free personal edition of XMLmind XML Editor, which you can download here:

<http://www.xmlmind.com/xmleditor/download.shtml>

If you're using Windows, download and install the "Windows auto-installable binary distribution, bundled with a private JavaTM 1.6.0\_04 runtime."

If you're using a Macintosh, download and install the "Mac OS X auto-installable binary distribution." This version requires Mac OS X 10.4 (Tiger) or Mac OS X 10.5 (Leopard) and the latest Apple Java 1.5 runtime.

Start your XML editor and open your "for indexing" XML file. You should see the paragraph numbers preceding each paragraph. In XMLmind, they appear in yellow bands *above* the paragraphs to which they refer, and you will use those numbers as locators while you write your index:



You'll probably find that the paragraph numbers are too small for easy reference. To fix the problem in XMLmind, click **Options > Preferences > View** and set "Default point size" to something big, like 20. While you're there, you may also want to change "Monospaced font family" to a more readable (bold, maybe?) font.

If you get an error message when trying to to open the file in the XML editor, there's something wrong in the file, probably with one or more of the XML tags. With any luck, your XML editor will tell you what the error is and on which line it occurs. If you know what you're doing, you can open the file in a plain-text editor such as the excellent (and free) Notepad++:

<http://notepad-plus.sourceforge.net/uk/site.htm>

(You can set Notepad++ to show the line numbers on the left of the text, making it easy to go to the line that has problems.)

If you don't know what you're doing, you probably shouldn't mess around with this, as you could inadvertently break something else in the file. You may need to check with an XML expert (such as the client for whom you are working). If you can't resolve the problem, you simply won't be able to embed entries in the DocBook files, and, of course, you'll need to let your client know that.

Once you've successfully opened the file in XMLmind, you can use the paragraph numbers displayed there as locators while writing the index in your standalone indexing program.

**CAUTION:** *Before* writing an entire index and embedding all those entries, you should *always* try embedding entries from a short test file. Then open the resulting XML file with your XML editor. If the editor gives you an error message, the embedding test was not successful, and you should *not* write the index or continue in any way without first resolving the problem, perhaps with the help of your client. DEXembed embeds DocBook entries correctly in our test documents, but it has not been used extensively in the real world for this purpose, and there's *no guarantee that it will work at all*. XML can be tricky stuff, so test, test, test before proceeding with the real thing.

### 4.13.2 Embed Entries for DocBook Index

After you've written your index and exported it as a tab-delimited text file, follow these steps to embed your entries:

1. In Word, use **File > Open** to open the "for Index" XML file (for example, "MyChapter for Index.xml"), using UTF-8 encoding as described above. Please *do not* just double-click the XML file outside of Word.
2. Open the tab-delimited text file, accepting the default "Plain Text" encoding.

3. With the tab-delimited file open as the active document, click **DEXembed > DocBook XML > Embed DocBook Index Entries** to embed the entries from the file into the DocBook XML document.

DEXembed will embed the entries, save the files, and close the files so you don't have to worry about how to save them.

Although you won't see the embedded entries unless you open the XML document into a text editor, the entries look something like this:

```
<indexterm>
  <primary>
    Apples
  </primary>
  <secondary>
    in pies
  </secondary>
</indexterm>
```

DEXembed can convert and embed the following using DocBook tags:

- Main entries
- Subentries
- Sub-subentries
- “See” cross-references
- “See also” cross-references
- Forced sort for main entries (based on the first character specified as a forced sort in your standalone program).

DEXembed currently does not support special page numbers in bold or italic.

After the entries have been embedded, DEXembed will (1) remove the paragraph numbers added earlier and (2) save and close the document ready for your client to use.

**Note:** When embedding DocBook index entries, DEXembed *ignores* the options set under **DEXembed > Set DEXembed Options** (except for “Use chapter designators for multiple chapters”). It automatically uses paragraph numbers as locators and handles ranges using DocBook syntax.

### 4.13.3 Remove Entries for DocBook Index

This feature removes existing DocBook index tags.

#### **4.13.4 Remove Paragraph Numbers from DocBook File**

This feature removes paragraph numbers that were previously added to the DocBook file.

#### **4.14 Register DEXembed**

DEXembed will stop working after its 45-day trial period. Clicking this feature explains how to purchase a license to use DEXembed so it will continue to work without limitation.

#### **4.15 About DEXembed**

Displays the current version of DEXembed and its registration status.

## 5 Keyboard Shortcuts

DEXembed includes useful keyboard shortcuts to help you work more efficiently:

Feature	Shortcut
Set a bookmark (named StartOfTopic) at the beginning of a passage to be indexed.	Ctrl + Alt + M
Get the locator for the selected text and place it in memory so it can be pasted into a standalone indexing program.	Ctrl + Alt + L
Find and select the text corresponding to the locator in memory (copied from a standalone indexing program).	Ctrl + Alt + F
Display the number of the current paragraph.	Ctrl + Alt + N
Go to and select the paragraph you specify (by number).	Ctrl + Alt + P

## 6 Locators

DEXembed can embed entries based on three kinds of locators:

- Word numbers
- Paragraph numbers
- Page numbers

But only one kind at a time, please.

The locators are listed in the options dialog in order of their precision. If you use word numbers, the entries will be embedded exactly before the *words* indicated by your locators. (Unfortunately, word locators can be ungainly; in a large document, they can get quite long.) If you use paragraph numbers, the entries will be embedded in the *paragraphs* indicated by your locators. If you use page numbers, the entries will be embedded in the *pages* indicated by your locators. (Unfortunately, page locators are not very precise; after the embedded entries have been imported into a composition program like QuarkXPress, the pagination will almost certainly change, making some of your page locator entries inaccurate.)

With paragraph numbering, the embedded tags will be placed five words into the first line of the designated paragraph, and in the case of a range of pages, several words in from the paragraph marking the end of the range. (This helps keep typesetters from inadvertently deleting them.) For most purposes, paragraph numbers offer a nice balance between the need for precision and ease of use, and they are the recommended option for use with DEXembed.

DEXembed makes it possible to select text and then press a key combination (**Ctrl + Alt + L**) to automatically obtain a locator that you can then paste into your standalone indexing program. The kind of locator you'll get is determined by your selection under **DEXembed > Set DEXembed Options**.

If you check the box labeled "Add comment when getting locator," a Microsoft Word "comment" that includes the locator will be added to your Word document; you may find this convenient for quick reference.

If you check the box labeled "Require chapter designators for multiple chapters," you are telling DEXembed that you are planning to embed entries in *multiple* documents from a *single* tab-delimited file, which indicates that you've added a two-digit chapter number to the front of each locator in your index *and* to the front of the name of each Word file so that DEXembed will know in which document to embed each entry.

Marking entries as a range of locators (for example, 323-327) can be done in two different ways:

- Bookmarks.
- Codes (range codes).

If you select “Bookmarks,” DEXembed will add uniquely named Microsoft Word bookmarks that span the range indicated by your locators. For example, if an entry specifies paragraph locators 3-5, then the third, fourth, and fifth paragraphs in your document will be marked with a bookmark named zzz3-5. The “zzz” is added to differentiate DEXembed bookmarks from other bookmarks that may already be in the document, and to force Word to sort them at the bottom of the bookmark list (under **Insert > Bookmark**).

If you select Codes, DEXembed will create *two* entries for *each* index entry in your tab-delimited file, one at the beginning and one at the end of the range specified by your locators, with the first entry using the “Start code” and the second using the “End code” that you’ve specified. This is an important feature because it enables publishers to generate indexes *with page ranges* in QuarkXPress, InDesign, and FrameMaker without the difficulties that usually occur with bookmarks. Then, after a publisher sends you the generated index for final editing (as a Word file, not a PDF), DEXembed will properly combine the paired entries and eliminate the range codes as part of the final editing process.<sup>1</sup>

You can also elect not to mark ranges at all, and in spite of tradition, many indexers now consider this to be a legitimate option. After all, most readers simply go to the first page in an index range and then read from that point, so it can be persuasively argued that the second locator in a range does little more than take up unnecessary space and add needless complexity to indexes and to indexing procedure.

---

<sup>1</sup> Please note that combining range codes will work correctly only on actual text and *not* on a generated index field. You can tell if your index is a field by placing your cursor anywhere in the index text. If the entire index turns gray, it’s a field. Before combining coded ranges, you *must* convert that field to actual text. To do that, put your cursor anywhere in the index; then press CTRL + 6. The index field will be converted into actual text, and combining coded ranges should work correctly. (Combining coded ranges is really intended for use with an index generated by the publisher in a composition program such as InDesign. If you’re generating an index in Word, marking ranges with bookmarks is a better option than using codes.)

### 6.1.1 Embedding with Multiple Files

If (and *only* if) you are going to embed entries from a *single* index file into *multiple* documents, you *must* follow these steps:

1. Click **DEXembed > Set DEXembed Options** and select “Require chapter designators for multiple chapters.”
2. Rename your files to include a two-digit chapter number at the beginning of the file name. These two digits must correspond to those used with the locators for that chapter in the index to ensure that entries are embedded in their proper chapters. For example, if you’re indexing a file named MyChapter.doc, you’ll need to rename it to something like 02MyChapter.doc. There’s no need to do this manually, however. A number of free renaming programs are available. One of the best is Flexible Renamer, which can be downloaded here:

<http://hp.vector.co.jp/authors/VA014830/english/FlexRena>

3. In your index file, start each locator with a two-digit number specifying the chapter into which that entry will be embedded, followed by a period. For example, a locator for paragraphs 10 through 12 in chapter 3 would look like this:

03.10-12

Note that “03.” occurs only before the first number in the range and is *not* repeated in front of the second. A range locator should *never* look like this: 03.34–03.78. This is true whether you use page, paragraph, or word numbering.

When you use chapter designators for embedding in multiple files, all cross-references (such as *See*, *See also*, and *See under*) must *also* be preceded by the two-digit chapter number and period in the page field of SKY Index. This is necessary in order to embed them properly in the relevant chapter. Thus, a cross-reference will look like this:

03.See also dogs.

*Tip:* You can avoid the extra keystrokes (03.) simply by entering the locator numbers by themselves and then, after indexing the chapter, add the chapter prefixes automatically. *The tutorial below explains how to do this in SKY Index.*

But remember: You'll need to do all of this *only* if you're embedding entries from a single index into multiple files. If the entire book is simply in *one* file, you won't need to use chapter designators at all.

## 6.2 Method 1: Working from Printed Pages

Some indexers prefer to work from printed pages. If you're one of them, here's how to do that. (Note: Using paragraph numbers as locators is the only option that allows this.)

1. Click **DEXembed > Set DEXembed Options > Paragraph Numbers**.
2. Open the chapter to be indexed.
3. In the DEXembed drop-down menu select **Prepare Document > Add Paragraph Numbers**. DEXembed will place paragraph numbers to the left of every paragraph.
4. Print the document.
5. Use the paragraph numbers as locators in SKY Index. They can be typed directly into the page field.

## 6.3 Method 2: Working On Screen

You can also work on screen, switching back and forth between the Microsoft Word document and your indexing program (press **Alt + Tab** or click the appropriate program window). If you have two monitors or a single wide-screen monitor—22" or 24" monitors work best—you can index on screen *without* switching—highly recommended.

Working on screen also allows you to avoid typing complex entries by copying and pasting from Word directly into SKY Index or other standalone indexing program. In fact, on many mice now available, you can program two buttons for copy and paste and perform these actions directly from the mouse (if you're a rodent lover!).

With this method you also have the option of obtaining paragraph or other locators automatically. You can do that in three ways:

1. Place your cursor in any paragraph of the document and press **Ctrl + Alt + L** (L for *locator*). DEXembed will automatically place the locator for that paragraph into the clipboard, ready to be pasted into the locator field in SKY Index or other indexing program.
2. For ranges, place your cursor at the beginning of the text to be selected. An easy way to select text is to hold down the SHIFT key and move your cur-

sor to the end of the text you want to select. You can also select text with your mouse (two clicks for a word, three clicks for a paragraph), or you can click at the beginning of the text, hold down SHIFT, and then click at the end of the text. With the text now selected, press **Ctrl + Alt + L**, and the full range locator will automatically be placed on the clipboard, ready to be pasted into your indexing program.

3. You can also let DEXembed select text for you:
  - A. Place your cursor at a point in a reference document that you know marks the beginning of your selection.
  - B. Press **Ctrl + Alt + M** to set the StartOfTopic bookmark.
  - C. Move your cursor to the end of your selection and press **Ctrl + Alt + L**. DEXembed will automatically select the text—from the StartOfTopic bookmark to the position of your cursor—and place the locator on the clipboard. It will then automatically delete the bookmark so you can set it again in a new position.

### 6.3.1 Word number locators

This option will embed tags exactly where you place your cursor in the Word document (between words, not characters). When using this option, you *must* work *on screen*. If necessary, you can still print out pages for reference, but you can obtain locators only by using **Ctrl + Alt + L** as described above.

### 6.3.2 Locating Text from a Locator

If you copy a locator from SKY Index into your clipboard and then insert your cursor anywhere in the Word document and press **Ctrl + Alt + F**, DEXembed will find the corresponding text in your reference document. Note that this is based on the locator type selected under **DEXembed > Set DEXembed Options**.

### 6.3.3 Locating Paragraphs in Word Files

There are two very useful keyboard shortcuts if you are indexing with paragraph numbers:

- **Ctrl + Alt + P** (go to paragraph number—if you know the number): the paragraph will be selected.
- **Ctrl + Alt + N** (display paragraph number): shows the number of the paragraph where the cursor is located.

These two commands come in handy during both the indexing and editing processes.

### 6.3.4 Cross-References

DEXembed places cross-reference embedded tags at the end of the Word chapter, several words in from the end of the last paragraph. Some publishers require special formatting of these tags (for importing into a layout program), which can easily be accomplished with Word's Find and Replace feature.

*Note:* Most layout programs don't handle embedded cross-reference tags well and thus require cleanup in the final generated index. A clever way to completely avoid this is to place your cross-reference at the end of the relevant entry and *not* in the page field. Thus your entry (main or sub) might look like this in SKY Index, CINDEX, or MACREX:

Opera singers. *See* divas.

In other words, add “. *See* divas” directly to the main entry or subentry rather than placing it in the page (locator) field.

The embedded tag will look just like that, and QuarkXPress or FrameMaker will read it as a single entry. If you don't like the way this looks in your indexing program, you can enter your cross-references in the usual way, since DEXembed has another great feature that will clean up the final Quark or Frame-generated output later on.

## 7 Ranges

In embedded indexing, the term *range* takes on a somewhat different meaning than in conventional indexing where you are using page numbers as locators.

Since you want the embedded tags that define a range to translate into correct pagination when the pages are composed in the layout program, and since you also want to take into account any possible reflow of text during layout or in a later revised version, *a range can encompass one or more paragraphs as well as one or more pages*. This is up to the discretion of the indexer and the requirements of the publisher. (In the final generated index, of course, locators will be displayed as page numbers, even if you're using paragraph numbers as locators while writing your index.)

Microsoft Word uses bookmarks to define ranges, but bookmarks create problems when imported into layout programs like QuarkXPress, FrameMaker, or InDesign, and most publishers don't want anything to do with them. But without bookmarks, how can these programs recognize index ranges?

As described earlier, many publishers have adopted a system of using arbitrary codes to signify the beginning and end of a range. Thus, DEXembed allows the indexer to create such coded entries (and tags) without ever having to type a single code. The process is fully automated.

When you **Set DEXembed Options** at the start of a project, you will enter the begin and end range codes you wish to use. Some indexers use BEG and END. Others use RRA and RRZ or something similar. The only rule when using DEXembed is that the start-of-range code must alphabetically *precede* the end-of-range code (as in the examples given here). Once this option is set, DEXembed will automatically add these codes and a unique numerical value to all embedded index tags (even those *without* ranges).

The embedded tags you would see in the Word file for the main entry "dogs" would look something like this:

```
{ XE "dogs|72BEG, 8" }  
{ XE "dogs|72END, 8" }
```

Note that there are two tags here even though there is no range, and that's the way it's supposed to be. DEXembed creates these double entries to facilitate the cleanup later.

The tags for the main entry "animals," with a subentry for "dogs," and a range of 8-12, would look something like this:

```
{ XE “animals:dogs|72BEG, 8” }  
{ XE “animals:dogs|72END, 12” }
```

This all occurs automatically in the embedding process. When the final index is generated in the layout program (QuarkXPress, FrameMaker, or InDesign) and returned to you as a Word file for final editing, it will have the correct final pagination but still contain the codes. It will look something like this (where BEG and END, for example, were the range codes used):

```
dogs|72BEG, 8  
  beagles|86BEG, 12  
  beagles|86END, 14  
  collies|345BEG, 9  
  collies|345END, 9  
  pinschers|45BEG, 10  
  pinschers|45END, 10  
dogs|72END, 16  
canines” \t “See dogs, 120
```

*Note:* DEXembed automatically adds the pipe symbol (vertical line), the unique numerical identifiers, and the designated codes during the embedding process to facilitate the cleanup process that follows.

The stray characters and extraneous locator in the See reference is typical of what QuarkXPress generates from cross-references. If the compositor has not cleaned this up (usually not), DEXembed will. If another composition program produces other extraneous material, you’ll need to use Word’s Find and Replace feature to eliminate it.

## 7.1 Range Code Cleanup

DEXembed has a feature that automatically removes range codes, properly combines the locators, and cleans up the stray characters and locators in the cross-reference entries—all at once! Click **DEXembed > Modify Existing Index > Combine Coded Ranges**.

The result, in the case of the above example, will look like this:

```
dogs, 8–16  
  beagles, 12–14  
  collies, 9  
  pinschers, 10  
canines. See dogs
```

This feature alone will save a great deal of time so you can focus on substantive editing rather than cleanup editing.

*Note:* A few publishers have devised a tool chain of their own that will remove the codes and properly combine the locators as part of the layout process prior to returning the index to you for editing. In this case, you will have to submit your embedded files with the codes in the form the publisher requests. A wildcard Find and Replace will usually handle this.

*Here's an example:* Suppose the publisher wants you to use BEG and END as the range codes. You would enter these under DEXembed options at the start of the process and proceed normally. Now, let's say the publisher already has a process in place that will clean up those codes during the layout process and therefore needs to see only those codes and nothing else in the embedded tags.

In that case, after embedding, run the following wildcard Find and Replace on the file before sending it back. (Click **Edit > Replace**. If the "More" button is showing, click it. Put a check in the box labeled "Use wildcards."):

In the Find What box, enter this:

```
|[0-9]{1,}
```

In the Replace With box, enter nothing (in other words, make sure the box is empty). Then click Replace All.

That would change all the tags from this:

```
dogs|65BEG and dogs|65END
```

to this:

```
dogsBEG and dogsEND
```

Please see "Editing the Final Index" later in this guide for a more detailed discussion of the final editing process.

## 8 Error Log

After you've embedded entries with DEXembed, the program will create and automatically display a log of any errors it encounters, including:

- The number for the kind of error (for debugging purposes).
- The row number in the file where the error occurred.
- The text for the main heading of the entry (e.g., 'Apples'), in single quotation marks.

Usually errors are caused by an illegal character in the locator, which should be composed only of numbers, with a hyphen or en dash to separate number ranges. Anything else will cause trouble.

A typical log entry looks like this:

```
Error 13 on entry 1, 'Apples.' Illegal locator or other problem.
```

The error log also includes the date and time when you started the embedding process:

```
DEXembed Error Log 1/23/2008 4:08:21 PM
```

Using the log, you can locate and correct the offending entries. It's difficult to predict everything that might cause an error. Sometimes you just have to check for anything that looks fishy and change it to something else. Be sure to close the error log before running DEXembed again.

DEXembed will delete the existing error log each time you embed entries, so if you want to keep a certain log, you should rename it, possibly using the date and time as part of the filename. The log is automatically saved to your Documents folder.

## 9 Embedding for LaTeX

You can use DEXembed to embed index entries into a Word document for conversion into the LaTeX typesetting system—*if* you or your clients are planning to convert the document using one of the following programs (both available at no charge):

Writer2LaTeX (which is also included as a built-in export filter with OpenOffice.org’s Writer program):

[www.hj-gym.dk/~hj/writer2latex/](http://www.hj-gym.dk/~hj/writer2latex/)

WordML2LaTeX:

[www.ctan.org/tex-archive/support/WordML2LaTeX/](http://www.ctan.org/tex-archive/support/WordML2LaTeX/)

Both do a fairly good job of converting Word documents into LaTeX, including embedded index entries. (Other converters may also work.) However, they won’t convert the more esoteric “switches” available in Word index entries, such as forced sorts. As long as you stick to such basics as main entries, subentries, cross-references, and locators, you should be okay. (Please consult the most recent program documentation for a full description of what can be converted.) As with everything else, be sure to run the process on test documents before proceeding with the real thing.

## 10 Tutorial

This tutorial uses SKY Index for the examples given. Any of the functions described here can most likely be duplicated in CINDEX or MACREX.

The organization of files, folders, naming conventions, and so on, are an individual choice, and the examples given here are simply how this indexer (Ron Strauss) decided to organize his work.

### 10.1 Step One: Organize Files and Folders

If your publisher's work flow is such that you are sent one or two Word chapters at a time to index and embed, then set up three folders for the book, naming them as follows:

- Original Word Files.
- Embedded Word Files.
- Index files. This will contain the exported tab-delimited files for each chapter.

#### 10.1.1 Master File.

You will also create a SKY Index "Master file," which you can name with the book title, ISBN number, or any other convenient designation. The "Master File" will contain your growing cumulative index in SKY Index.

You index each chapter in the SKY Index Master file (using the form of locator you chose under **Set DEXembed Options**) just as you would in a non-embedded index. If you will be embedding in multiple files, you must prefix the locators with their two-digit chapter numbers so DEXembed will know which entries are associated with which Word chapters (see step 3 below).

Some indexers may prefer to index each chapter in a separate SKY Index file, save those files, and then later merge them into a Master file in order to see the whole index as it grows. To do this in SKY Index, click **Files > File Management > Merge**.

## 10.2 Step Two: Back Up Files

Make copies of the original Word files as you receive them. Always work with these backups of your original files. Place the backups on your desktop or in a folder where they won't get confused with the originals.

## 10.3 Step Three: Rename Files

If you'll be embedding entries in multiple files, rename the backup copies by adding the two-digit chapter number to the *beginning* of the name.

*Examples:* 02.SmithCh02, or 03\_SmithCh03, or 04Smith.

The two-digit number of the chapter must occupy the first two places in the file name. (The rest of the file name is irrelevant to DEXembed.) This is critical to the embedding process. You can delete these initial digits from the file name after the files are embedded. Front-matter chapters (preface, etc.) can be named with 00, appendixes named with consecutive numbers following the last chapter (e.g., appendix A might start with 22 if there are 21 chapters in the book; appendix B would start with 23, etc.).

*Page Numbering.* It does not matter to DEXembed whether the pages of your Word documents are numbered or not. Some publishers request that you number the pages in some form prior to indexing.

## 10.4 Step Four: Set Options and Preferences

Set the following Preferences and Options in both Word and SKY Index before proceeding:

### 10.4.1 In Word:

If you want the index tags to show up in red or some other color for rapid identification, click **Tools > Options > Track Changes > Insertions** and set to a Color. This and most other options set in Word will become the default until you change them.

### 10.4.2 In SKY Index:

1. Click **Options > Index Options > Locators tab**. Set the chapter input and output separator to a period and check the checkboxes for "Chap-

- ters” and “In page Runs Only.” Set the page-range style to “Simple.” This will produce the SKY Index locators and corresponding index file in the form required by DEXembed.
2. Click **Options > Index Options > Locators tab > Volume Separators > Input & Output** and set the separator to a colon (:) or something other than a period.
  3. **Groups > Define.** Under **Name**, type “Current Chapter” (or something similar). Uncheck all fields except “**Page.**” Under “**Pattern,**” enter !. (an exclamation point followed by a period). You will use this later on to group all the entries for a currently indexed chapter prior to exporting from SKY Index.
  4. After setting these (and any other) options in SKY Index, export a Sky Index “options template” and name it “Embedding” or whatever name will remind you to import this template at the start of an embedded indexing project—or chapter (if you are creating separate SKY Index files for each chapter).

## 10.5 Step Five: Set Form of Locator

Open the book or chapter in Word. From the DEXembed dropdown menu select **Set DEXembed Options** and choose “Page numbers,” “Paragraph numbers,” or “Word numbers,” depending on the type of locator you wish to use. Your selection will become the default in DEXembed until you change it. The locator option you choose must be used throughout the project. Obviously, *you cannot combine two of these numbering options in the same project.* See the **Locators** section of this guide for a detailed explanation of locator usage. If you’re embedding index entries from a *single* index file into *multiple* chapters, put a check in the box labeled “Require chapter designators for multiple chapters.” Of course, for this option to work, your locators and filenames must actually include chapter designators. For more information, see section 6.1.1, “Embedding with Multiple Files.”

## 10.6 Step Six: Set Form of Ranges

In **Set DEXembed Options**, under “**Mark ranges automatically with,**” select “Automatically named bookmarks,” “Codes,” or “Nothing.” If you’ve selected Codes, enter the specific start and end range codes to be used. See the “Ranges” section in this guide for further explanation.

## 10.7 Step Seven: Clean Up Original File

If there are a lot of tracking changes and/or commenting in the document, launch the “**Reviewing**” toolbar (right-click on any tool bar) and select “**Final Markup**” to minimize their visibility. If there are old XE indexing tags in the document to be removed, select **Prepare Document > Remove Embedded Entries** from the DEXembed menu. Or you can search and replace (*Find: ^d XE Replace: Nothing*). Number the pages if necessary or directed to do so by the publisher. *Save* the document.

## 10.8 Step Eight: Number Paragraphs

In step three above, if you selected **Paragraph Numbers**, now select **Prepare Document > Add Paragraph Numbers** from the DEXembed menu. All the paragraphs in the document will be numbered in the left-hand margin. **DO NOT SAVE**. You will index from this numbered document, but you will embed into the document saved in step 7 above.

## 10.9 Step Nine (optional): Print Document

Print the paragraph-numbered document—unless you will be working on-screen with Word and SKY Index open simultaneously. After printing, close the document *without saving*.

## 10.10 Step Ten: Index Chapter

Index the chapter in your SKY Index “Master File,” typing paragraph numbers directly into the Page field, or using **Ctrl + Alt + L** (perhaps first using **Ctrl + Alt + M** [mark range]) to get single or range locators automatically copied directly to your clipboard. Paste the locator(s) into the Page field in SKY Index. If you will be embedding into multiple files, everything in the page field (locators *and* cross-references) must be preceded by the two-digit chapter number. Sky Index can add these automatically at the end of each chapter (see 9.10.2 below)

### 10.10.1 Cross-References

As mentioned above, if you will be embedding into multiple files, then whenever you enter a *See* or *See also* cross-reference in SKY Index’s page field,

always prefix the *See* with the two-digit chapter number followed by a period. For example, for chapter 3, “03.see also . . .,” or for chapter 21, “21.see . . .”

The cross-references will thus embed in the chapters in which you created them. You can make this a keyboard shortcut if you like for each chapter. If you use **Ctrl + Alt + L** to get your locators, the two chapter digits will automatically be included in the locator (except for cross-references).

## 10.10.2 Adding Two-Digit Chapter Designators

If you choose to enter the paragraph numbers manually (either from printed pages or from the on-screen paragraph-numbered file), you can do all your entries without worrying about the two-digit chapter designators and then add them at the end as follows:

1. In SKY Index—Select **Groups > Current Chapter** (or whatever name you chose to define the Group in Step Four above. The **!** symbols in the Pattern Field will tell SKY Index to group all entries whose locators do not have a period. This instantly groups all the entries from your currently indexed chapter as these will be the only ones without the 2-digit prefix (since previously indexed chapters would all have them). Your current chapter entries are now isolated (grouped).
2. In SKY Index—**Tools > Add/Remove Volume/Chapter Labels** (or **Alt + T + V**). Check “add” and “chapter” and enter the 2 digit number in the “labels” field (*no period*, just the digits). Press okay and the locators of all your grouped entries (except Cross-References) will show the desired prefixes.
3. Then, on the same grouping, for cross-references—Find: “See” and Replace: “##.See” (include the period). That will add the desired prefixes to all cross-references in the group. These steps take a matter of seconds at the end of indexing each chapter.

## 10.11 Step Eleven: Edit Chapter

At this point this indexer sometimes likes to return to “As Entered” mode in SKY Index and quickly scan to see how the newly indexed chapter entries fit in with the rest of the index. One might also group the current chapter entries again in alphabetical order (now you can “Group by Chapter Number”—**Ctrl + Alt + H** in SKY Index), and do a quick edit on them. Performing mini-edits on these chapters prior to embedding may be something you will want to do as a

routine with each chapter in order to save time in the final edit phase. Such ongoing editing will also help you make consistent entries in future chapters.

*Important:* Don't forget to check your locators for the chapter prefixes at the conclusion of indexing each chapter, as this is what differentiates paragraph 42 in Chapter 01 from paragraph 42 in Chapter 03, for example. And DEXembed needs to know this, of course, when it comes time to embed.

See the **Locators** section in this guide for an explanation of the other locator types if you prefer not to use paragraph numbers.

### 10.11.1 Indexing Tips

1. Use Sub-entries as much as possible to qualify mains that seem to be broad enough to warrant subs (a standard indexing practice).
2. Most publishers do not want tags placed in heads or subheads, captions, tables, figure reference fields, or figure captions. A safe bet is to always embed your tags in body text and nowhere else.
3. A very useful keyboard shortcut in SKY Index, **Ctrl + Alt + U**, will refresh the Auto-Complete feature to account for any changes, corrected typos, etc. Using this command at regular intervals can save a lot of typing.
4. If you are a mouse lover, the Microsoft IntelliMouse, Logitech Laser mice (and many others) have programmable buttons. Setting one button for copy, another to paste, and another to cut is invaluable, particularly if working on-screen, where you can cut, copy, and paste complex entries (or any entry) directly from Word to SKY Index without letting go of the mouse (helps eliminate typos).

## 10.12 Step Twelve: Export the Index File

The index file is what DEXembed uses to embed the Word document. In order to export only the entries for a particular chapter, follow these steps in SKY Index:

1. *Group* the entries for a particular chapter using **Ctrl + Alt + H**. Leave the "Volume" field blank and enter the 2-digit chapter designator in the "Chapter" field (no period). Click OK and all the entries from that chapter will be grouped and ready for export.
2. **File > Export** will bring up the export dialog. Select TEXT format. This will give you a tab-delimited file (.txt), which is exactly what you want. Also, be sure to *uncheck* "Enclose fields within Quotes." You can name

the text file anything you like but include the chapter number for future reference. So you might name it Ch03IDX or Ch03TDF (for tab-delimited file). Save to a convenient place like your desktop. For convenience we will refer to this as an “index file” throughout this Guide.

## 10.13 Step Thirteen: Embed the File

*Important—Follow These Steps Exactly:*

1. Open the (non-numbered) original file you just indexed in Word. If you accidentally embed the numbered file, don't forget to remove the numbers with **Prepare Document > Remove Paragraph Numbers** on the DEXembed menu before submitting your file!
2. Open the index file. You now have two Word windows open.
3. With the index file as the active window, select **Embed from Tab-Delimited File** from the DEXembed menu (in the index file toolbar, not the chapter toolbar).

This will automatically embed the index tags in the Word document and simultaneously add the range codes you chose in step 4. There will be no bookmarks in these tags unless you told DEXembed to mark ranges with bookmarks under Set DEXembed Options.

**Note on Placement of Tags:** Word automatically places all cross-references at the end of the document. To avoid any possibility of losing tags, DEXembed places all the cross-references several words into the last paragraph of the document.

*Important Note:* When using paragraph numbers as locators, DEXembed automatically places index tags four or five words in from the start of a paragraph and, for ranges, several words in from the end of the last paragraph in the range. Therefore try to use paragraphs that are at least eight words long for your embedding.

## 10.14 Step Fourteen: Saving and Renaming

Save and rename the Word file (Save As), adding a suffix to the file name such as IND (for Indexed) or EMB (for Embedded) and deleting the two-digit chapter prefix you added in Step Two.

## 10.15 Step Fifteen: Checking Tags

Briefly scroll through the now-embedded file, spot-checking to see that the tags are in the right places and have the codes appended to the entries. DEXembed is very accurate, but we suggest this quick review as you may find something you wish to change or add. Also, if you made an entry error in a SKY Index locator field, the tag might be in a place other than where you intended it. If you should move or change a tag, make the corresponding locator change in your SKY Index file.

## 10.16 Step Sixteen: Organize Your Files

1. Store the index file in the dat folder you created in Step One.
2. Before sending the embedded file off to the publisher, make a copy of it for the Embedded Files folder you created in Step One.

## 10.17 Step Seventeen (optional): Preview Word-Generated Index

This step is not usually necessary, but if you ever want to preview a given chapter's index entries *as generated by Word*:

1. Click **DEXembed > View > Hide Index Tags**.
2. Click **IDEXembed > Generate Index from Embedded Entries > OK**.
3. Look through the index as needed.
4. Delete the index at the end of the document before sending the document to the publisher.

See also “Previewing the Combined Index in Word” in this guide.

## 10.18 Step Eighteen: Final Editing

When all chapters have been indexed, sent off, laid out, and the final index generated, your client should send you a Word file (in rare cases a PDF) to edit. Please see the following section.

## 11 Editing the Generated Index

Editing the final index is a tricky business in embedded indexing. The approach to your final edit depends on the workflow of your publisher. There are three basic scenarios:

### 11.1 Scenario 1: Changes in the final edit must be made in the embedded tags themselves

If the embedded files have not yet gone to layout and you are given access to them after completing the indexing, you can perform your final edit in SKY Index and re-embed the entries into the Word chapters. Your SKY Index file contains the index for the entire book, and the locator prefixes indicate which chapter each entry came from (which is how DEXembed knows where to embed the tags).

Thus, after your final edit you can generate a new index file for the entire book and use it to quickly re-embed all the files, one at a time.

But first you must select **Prepare Document > Remove Embedded Entries** from the DEXembed menu to remove the previously embedded tags from each file. Then select **“Embed from Tab-Delimited File”** on the DEXembed menu to re-embed the file.

### 11.2 Scenario 2: Changes apply only to the printed book index and will not require changing embedded tags

In this scenario you should receive a Word file (generated by the layout program) which now has the correct pagination. The range codes and possibly other extraneous characters will still be part of this document. Here is the clean-up/final edit process:

1. DEXembed can clean up this file in short order. Click **DEXembed > Modify Existing Index > Combine Coded Ranges**. This feature will eliminate all the range codes, combine the appropriate locators with an en dash, and clean up cross-reference debris left over from QuarkXPress in particular. The file should then be reviewed for any other anomalies left over from the layout program, and corrected.

2. At this point, the Word file can either be edited in Word directly or prepared for import back into SKY Index, where it is much more efficient to perform the final edit. In order to import your index back into SKY Index you must first convert it to a tab-delimited table. This is described in sections 4.13.4 and 4.13.5 above and repeated here for emphasis and further detail.

For example, let's say you have an existing, formatted index, one that looks something like this (run-in or indented, it doesn't matter):

- Adobe Acrobat, indexing files from, 51
- Angle brackets, in generated index, 47
- AutoCorrect, 58
- Bookmarks:
  - counting, 16
  - upper limit on, 16
  - StartOfTopic, 19
  - displaying, 28, 37–38
  - tagging, 56
- Brackets, in generated index, 47
- Capitalize or lowercase a word, 34
- Capitalizing, headings, 24–25

You will have to “deconstruct” that index into a tab-delimited file in order to import it into CINDEX, MACREX, or SKY Index. In other words, you want it to look like this (with tabs between the elements):

Adobe Acrobat	indexing files from	51
Angle brackets	in generated index	47
AutoCorrect		58
Bookmarks	counting	16
Bookmarks	upper limit on	16
Bookmarks	StartOfTopic	19
Bookmarks	displaying	28, 37–38
Bookmarks	tagging	56
Brackets	in generated index	47
Capitalize or lowercase a word		34
Capitalizing headings		24–25

In order for DEXembed to make this conversion, the index levels *must* be formatted as follows: Index 1 (for Mains), Index 2 (for Sub-1s) and Index 3 (for

Sub-2s). DEXembed will do this for you. Select **Modify Existing Index > Standardize Styles**. Enter the names of the existing styles and click OK. DEXembed will replace those styles throughout the index.

To ascertain what the names of the existing styles, place your cursor over any main, sub-1 or sub-2 and note the name of its style in the dropdown Styles menu on Word's formatting toolbar.

Once DEXembed has standardized the styles, you are ready to deconstruct your index (after backing up your original file, of course). Select **Modify Existing Index > Convert to Tab-Delimited File**. DEXembed will convert your index into, believe it or not, a .dat file (plain text)! It will automatically open. Check it carefully against the original index to make sure the deconstruction was successful and accurate and the formatting is correct. Save to your desktop or other convenient location and close the file.

Now the final step: In SKY Index select **File > Import**. In the "file types" dropdown menu select CINDEX (\*.dat). Then navigate to where your .dat file is located, select it, and click open. The index will flow into SKY Index with all the elements neatly placed in the correct fields, ready for you to perform your final edit.

## 12 Editing Microsoft Word Index Tags

### 12.1 Tag Syntax

At times you may want to edit a few tags directly in an embedded Word document. These tags can be edited, copied, cut, and pasted. Their exact format is:

```
{ · XE · "dogs" · } Main entry = dogs  
{ · XE · "dogs:poodles" · } Main entry = dogs, Sub1 = poodles  
{ · XE · "dogs:poodles" · \t · "See · canines" · } Cross-Reference  
(See and See also)
```

The dots (for purposes of illustration) indicate spaces, and the colon indicates sub-headings. The beginning and ending braces are part of the index-entry field and *cannot* be typed in by hand. If you try doing so, your index entry will be ignored.

### 12.2 Special Characters in Tags

Since colons and quotation marks are part of Word's syntax for index tags, if you have either of these characters in the text of your entry you will have to ask your publisher how to handle them (particularly if these files will be imported into a layout program).

The solution used when indexing directly in Word (when Word will generate the index) is to "escape" those characters by inserting a backslash ( \ ) before any colon or quote mark in the entry. Word will then treat those characters as part of the entry text.

Examples:

```
{ · XE · "\"All About Dogs\"" · }  
{ · XE · "FileMaker Pro\ : For Dummies" · }
```

### 12.3 Forced Sorts

This is another point to check with your publisher.

Let's say you have an entry like <body tags> and you want it to sort under "B" in the index. Again, if indexing directly in Word, you would use a semicolon ( ; ) to force the sort, as follows:

Example: { · XE · "<body · tags>;body · tags" · }

The entry will *appear* in the index as it looks *before* the semicolon, but it will *sort* as it looks *after* the semicolon. This will work for a Word-generated index but may not work for an index generated by Quark, PageMaker, or InDesign. Check with your client.

## 13 Previewing the Developing Index in Word

If you ever need to preview your compiled index in Word at any stage of development:

- For a single chapter, simply insert a page break after the end of the text (**Insert > Break > Page Break**) and then click **Insert > Reference > Index and Tables**, and click OK on the Index tab. The index appears at the end of your Word document.
- To view the combined index for a number of Word chapters:
  1. Set up some sort of convenient page numbering if the chapters are not already sequentially numbered (e.g. Chapter 1 starting at 101, Ch. 2 starting at 201, etc.)
  2. In the same file folder as your chapters, create a new Word document that will hold the combined index.
  3. In the index document, set up an RD (“referenced document”) field for each chapter to be covered by the index:
    - a. Click **Insert > Field > RD**.
    - b. Under “Field properties,” type `filename` (e.g., `ch01.doc`).
    - c. Under “field options,” select “Path is relative to current doc.” This will insert an RD field, which looks like this: `{RD "ch01.doc" \f}`
  4. Repeat these steps for each chapter you want to include in the index, or copy and paste the entire tag (including the brackets) and manually edit the filename so it looks like this: `{RD "ch01.doc" \f}{RD "ch02.doc" \f}`, and so on. Use one RD field per chapter, and list each chapter sequentially (ch01.doc before ch02.doc, etc.)
  5. Generate the index by placing the cursor at the end of the index file (after the final bracket) and clicking **Insert > Reference > Index and Tables > OK** (on the index tab). This will generate the index, using markers from all the referenced documents.

To update the index later on, click to the right of the index and then hit F9, or right-click and select Update Field from the pop-up menu that appears.

If you're not able to see the RD fields, go to **Tools > Options > Formatting marks > Hidden text** and click the **Show > Hide Paragraph Marks** button.

If you ever want to cut and paste a Word-generated index into its own separate file for editing, place the cursor anywhere in the index and type Cntrl-6. This will convert the fields into copyable text.

A way to circumvent this entire process is to make a copy of your embedded files and, after numbering the pages in some form of non-overlapping order, use DEXembed's **Prepare Document > Combine Documents** command. This will combine the individual files into one file. Once the files are merged simply generate the index for the entire file.

## 14 Registering DEXembed

If you like DEXembed and plan to continue using it, you should purchase a license to do so. If you don't, your copy of the program is for evaluation purposes only, and it will stop working after 45 days. After you purchase a license to use the program, we'll send you a password that will unlock the program to run without limitation on time or use.

The terms of your license prohibit you from giving your program password to someone else or using it on someone else's computer. However, you may use the password on up to three of your own computers. For example, you could install DEXembed and use your password on your computer at work, your computer at home, and your laptop. However, you may run the program on only one of your computers at a time. If you need to run the program on more than one computer at a time (for example, for use by a family member or employee), you must purchase another license and get another password for the program. This is the honest and legal thing to do. Besides that, we're a small company and need your support. Thanks for your cooperation.

### 14.1 Obtaining a Password

Here's how to purchase a program license so you can obtain your password:

1. Click the DEXembed menu at the top of your Word window.
2. Click "Register DEXembed."

You'll be presented with two options:

1. Get a password for this computer.
2. Enter the password for this computer.

Click option 1, "Get a password for this computer." Then click "OK."

You'll be presented with two more options:

1. Register on the Internet (at [www.editorium.com](http://www.editorium.com)).
2. Register by mail.

Click the option that meets your needs and follow the instructions on your screen. Registering on the Internet offers some distinct advantages:

1. You'll receive your password automatically by return email as soon as your payment is processed. If you're paying by credit card, you'll receive your password almost immediately. Just check your email as soon as your online registration is complete.
2. You can make your payment in several different forms: credit card, check, or money order. If you don't pay with a credit card, however, you won't receive your password until after we receive your payment.
3. You can make your payment in several different ways: on our secure online order form, by fax, or over the phone.

If you're interested in using a purchase order, please let us know by emailing [editor@editorium.com](mailto:editor@editorium.com).

If you don't have access to the Internet, you can still register by postal mail. In that case, we'll send your password by email (if you have it) or postal mail after we receive your check or money order and your registration form. If you're registering by mail, the program will create a registration form in Microsoft Word. Please fill out the form, using your cursor keys to move from item to item. Then print the form and mail it to the address at the top of the form.

## 14.2 Using Your Password

Once you've received your password from the Editorium, you'll need to enter it into the DEXembed program. To do so:

1. Click the "DEXembed" menu item at the top of the Word screen.
2. Click "Register DEXembed."
3. Click "Enter the password for this computer." Then click "OK."

The password entry box will appear on your screen. Carefully type the password into the box labeled "Enter your password."

If you have a valid password and type it correctly, the program will tell you that your registration was successful. After that, the program will run without limitation on time or use.

Thanks for your support!

## 15 Troubleshooting

### 15.1 Macros Are Disabled

*Problem:* When you try to open the file to install the program, Microsoft Word tells you that “The macros in this project are disabled . . .”

*Solution:* Microsoft Word’s macro virus protection is enabled or set to a high level of security. To change this:

In Word 2007 (PC):

1. Click the round Office button at the upper left of your Word window.
2. Click “Word Options.”
3. Click the “Trust Center” button on the left.
4. Click the “Trust Center Settings” button on the right.
5. Select “Enable all macros,” which you should change back to your previous setting after the installation is finished.
6. Click the OK button.
7. Click the next OK button to close the Word Options dialog.

In Word 2004 (Macintosh):

1. Click the “Word” menu.
2. Click “Preferences.”
3. Click “Security.”
4. Uncheck “Warn before opening a file that contains macros.”
5. Click the OK button.

In Word 2002/XP or 2003 (PC):

1. Click the “Tools” menu.
2. Click “Options.”
3. Click the “Security” tab.
4. Click the “Macro Security” button (on the lower right).
5. Click the “Security Level” tab if it’s not already active.
6. Set your security level to medium and click the OK button.
7. Click the next OK button to close the Options dialog.

In Word 2001 (Macintosh):

1. Click the “Edit” menu.
2. Click “Preferences.”
3. Click the “General” tab if it’s not already active.

4. Uncheck “Macro virus protection.”
5. Click the OK button.

In Word 2000 (PC):

1. Click the “Tools” menu.
2. Click “Macro.”
3. Click “Security.”
4. Click the “Security Level” tab if it’s not already active.
5. Set your security level to medium and click the OK button.

In Word 98 (Macintosh):

1. Click the “Tools” menu.
2. Click “Preferences.”
3. Click the “General” tab.
4. Uncheck the box labeled “Macro virus protection.”
5. Click the “OK” button.

In Word 97 (PC):

1. Click the “Tools” menu.
2. Click “Options.”
3. Click the “General” tab.
4. Uncheck the box labeled “Macro virus protection.”
5. Click the “OK” button.

After installing the program, you may want to reset your security settings to their previous state. If you don’t (in Word 2000 through 2003 on PC), any time you open a document or template that includes macros, Word will give you the choice of whether to disable or enable macros. If the document or template isn’t *supposed* to have macros in it, you should click the “Disable Macros” button, because the macros could be a virus. If the document or template *is* supposed to have macros and comes from a source you know is reliable, click the “Enable Macros” button so you can run the macros.

In other versions of Word, you don’t have these options. Macro virus protection is either on or off. Before turning it off permanently you may want to read more about it in Word’s Help file or check with your system administrator.

If you need more help, please send an email message to:

*support@editorium.com.*

## 15.2 You Generated an Index but See Only a Code

If you generate the index from the embedded entries in your Word document, but all you see is a code like this one—

```
{ INDEX \c "2" \z "1033" }
```

—don't panic. That “code” *is*, in fact, the index, but it's being displayed as a field code rather than the index text it represents. To solve the problem, click **Tools > Options**, click the “View” tab, and remove the check from the box labeled “Field codes.” Then click OK. Your index will appear.

## 15.3 DEXembed Won't Embed Your Entries

Make sure your tab-delimited index file is the active document (the one up front, with your cursor in it) before trying to embed. If the *reference* document (on the other hand) is active, DEXembed won't be able to find the entries in your index file, because it looks for entries in the active document.

Also, did you set the option to “Use chapter designators for multiple chapters”? If so, you *must* include those designators, both in your locators and in your filenames. If you don't, DEXembed won't embed your entries. For more information, please see the “Locators” section in this guide. If you don't need to embed entries from a single index into multiple chapters, simply turn off **DEXembed > Set DEXembed Options > Use chapter designators for multiple chapters**.

## 15.4 DEXembed Won't Work at All

*Problem:* DEXembed won't work at all, even though you've properly installed it as a global template and the DEXembed menu is visible at the top of your Word window.

*Solution:* You may see this problem if you're working on documents that have been created in other word-processing programs, such as WordPerfect, and then opened into Microsoft Word. If that's the case, you should save the documents from the other program into Microsoft Word format *before* opening them into Word. You may also need to use a dedicated document-conversion program.

## 15.5 Microsoft Word Crashes

*Problem:* Microsoft Word crashes at some point when you're using DEXembed.

*Solution:* Your document may be corrupt. If possible, open the document, copy all of its text but the final paragraph mark, and paste the text into a new document.

## 16 Any Questions?

We hope you find DEXembed to be immensely useful. If you have any questions or comments, please let us know.

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