

emDEX

**...embedded indexing in real time for FrameMaker®**



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# Table of Contents

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Table of Contents .....	i
Introduction .....	ii
Benefits of Using emDEX .....	ii
Conventions .....	ii
Installing emDEX .....	ii
Technical Support Resources .....	iii
Contacting emDEX .....	iii
Using emDEX .....	4
Starting emDEX .....	4
Using the Formatting Buttons .....	5
Customizing emDEX Using the emDEX Server .....	6
About the emDEX Window .....	9
About the emDEX Client .....	10
Preparing an Index Using emDEX .....	12
FAQs .....	13

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# Chapter 1

## Introduction

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Congratulations on purchasing emDEX v2.0, the embedded indexing tool for FrameMaker™. emDEX provides a separate window, so you can easily view the index entries without having to refresh the index each time you make a change.

This guide contains instructions on how to install and use emDEX v2.0 to index the FrameMaker™ files.

### Benefits of Using emDEX

With emDEX you can view the index in real-time, and check for orphan ranges, edit the entries, and check cross-references.

### Conventions

The following tables provide an explanation of the conventions used in this guide.

<i>italic</i>	<ul style="list-style-type: none"><li>• Path names, file names, and URLs</li><li>• Terms introduced for the first time</li><li>• Figure captions</li></ul>
<b>Bold</b>	<ul style="list-style-type: none"><li>• Controls in procedures such as menu items, button names, and keyboard key names.</li><li>• e-mail addresses</li></ul>

### Installing emDEX

If you do not have autorun enabled, you can install emDEX from the setup.exe on the software CD. Double-click the executable to begin the installation and follow the installation instructions on the screen. The executable installs emDEX on

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the hard drive. By default, emDEX is installed in the *C:\Program Files\emDEX* folder. If desired, you can change this directory during the installation.

### **Minimum System Requirements**

The minimum system requirements for emDEX are

- Win 9x, Win 2K, XP, or NT4 operating system

A help file is included with emDEX v2.0.

### **Technical Support Resources**

If you have purchased emDEX v2.0, you are entitled to free technical support. Contact us at **support@emdex.ca**.

### **Contacting emDEX**

You can also send your comments and suggestions to us by mail. Write to us at the following address:

emDEX  
P.O. Box 41117  
4141 Dixie Road  
Mississauga, Ontario  
L4W 5C9  
Canada

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# Chapter 2

## Using emDEX

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This section explains how to start and configure emDEX, and how to use its options.

emDEX is comprised of the following four components:

- The emDEX server, which is found in the tooltray
- The emDEX window, which shows the index in real-time.
- The emDEX client, which is on the FrameMaker® main menu.
- The emDEX Marker window, which allows you to add and edit entries.

### Select a topic:

- [Starting emDEX](#)
- [Using the Formatting Buttons](#)
- [Customizing emDEX Using the emDEX Server](#)
- [About the emDEX Window](#)
- [About the emDEX Client](#)
- [Preparing an Index Using emDEX](#)

## Starting emDEX

After installation, the emDEX client will be available from the FrameMaker® main menu, and the emDEX server will be available in the tooltray. When you start emDEX, it will list all the index entries for the selected file. Therefore in order to list all the index entries for a book, start emDEX with the focus on the book window.

### To start emDEX

**Note:** If you are indexing a book, start emDEX with the focus on the book window.

- 1 From the **emDEX** menu, click **Open emDEX window**.

By default, the **Always on top**, **Real-time updates**, and **Use emDEX marker editor** features are enabled.

- 2 From the **emDEX** menu, click **Marker**.

The **emDEX Marker** window opens.

- 3 In the document, click where you want to insert an index entry, type the entry, and then click **New Marker**.

When you click **New Marker**, the entry will appear in the emDEX window.

## Using the Formatting Buttons

The emDEX Marker window contains predefined formatting buttons. Instead of entering the FrameMaker® code manually, you can click a button and automatically insert a format, page ranges, or cross references. You can also define your own formats.

### To define a marker button

- 1 If open, close the emDEX Marker window.

- 2 From the **emDEX** menu, point to **Marker buttons**, and then click **Edit**.

The **emDEX Marker Buttons** window opens.

- 3 You can do one of the following:

- Edit a button as required.
- If you are creating a new button, in the **Display Text** box, type the text that will appear on the button. In the **Action** box, type the text or building block that will appear in the emDEX Marker window.

**Tip:** Type an ampersand before a letter to create a hot key for your user-defined button.

- 4 Click **OK** to apply changes and close the window.

### To save defined marker buttons

- 1 If open, close the emDEX Marker window.
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- 2 From the **emDEX** menu, point to **Marker buttons**, and then click **Edit**.

The **emDEX Marker Buttons** window opens.

- 3 Edit the Marker buttons as described in **To define a marker button**.

- 4 Click **OK** to apply changes and close the window.

- 5 From the **emDEX** menu, point to **Marker buttons**, and then click **Save**.

The **Save Buttons** dialog box opens.

- 6 Save the \*.EMB file to a directory.

### **To load defined marker buttons**

- 1 If open, close the emDEX Marker window.

- 2 From the **emDEX** menu, point to **Marker buttons**, and then click **Load**.

The **Load Buttons** window opens.

- 3 Browse to the \*.EMB file location, and then click **Open**.

## **Customizing emDEX Using the emDEX Server**

From the emDEX server located in the tooltray, you can customize the emDEX window using the following options:

- **Select a font**
- **Select a background colour**
- **Set an orphan range alert**
- **Change the sort order to either letter-by-letter or word-by-word.**
- **Select characters to ignore when sorting**
- **Set the page range separator**
- **Set real-time updates**
- **Set the emDEX window to be always on top**
- **Use emDEX Marker editor**

**Note:** Once set, changes are retained the next time emDEX is started.



**To select the font**

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Click **Font**.  
The **Windows Font** dialog box opens.
- 3 Choose the font, font size, and font colour.

**To change the background colour**

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Click **Background colour**.  
The **Windows Colour** dialog box opens.
- 3 Choose the background colour.

**To set orphan range alert**

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Point to **Orphan ranges** and click **Audio alert** or **Visual alert**.

If you select Audio alert, an audible alert will sound when an orphan range is detected.

If you select Visual alert, a message box will open, advising you that orphan ranges have been detected.

- 3 If you want to set both alerts, repeat step 1 and click the other alert option.

**To change the sort order**

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Point to **Sort order** and click the sort order required.  
Sort orders are reflected in the emDEX window only. If you want to change FrameMaker®'s sort order, refer to the FrameMaker® documentation.

**To set characters to ignore**

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Click **Characters to ignore**.  
The **Characters to ignore** dialog box opens.

Orphan range: A start range tag without a corresponding end range tag, or vice-versa.

- 3** Type the characters to be ignored when sorting in the emDEX window.
- 4** Click **OK** to confirm or **Cancel** to close the dialog box.  
Characters you choose to be ignored are reflected in the emDEX window only. If you want the same characters ignored in the FrameMaker® index, refer to the FrameMaker® documentation.

### **To set page range separators**

- 1** Right-click the emDEX server icon in the tooltray.
- 2** Click **Range separators**.  
The **Page Range Separators** dialog box opens.
- 3** Type the range separator to appear between the page range numbers.
- 4** Click **OK** to confirm or **Cancel** to close the dialog box.  
The page range separator you choose is reflected in the emDEX window only. If you want the same characters ignored in the FrameMaker® index, refer to the FrameMaker® documentation.

### **To enable real-time updates**

**Note:** If you are indexing a very large book, it is suggested that real-time updates is disabled. Depending on the speed of your computer, emDEX may not refresh immediately.

If you disable real-time updates, you will have to manually refresh the emDEX window.

- 1** Right-click the emDEX server icon in the tooltray.
- 2** Click **Real-time updates**.  
In the Marker menu, the Update window option is disabled.

### **To disable real-time updates**

- 1** Right-click the emDEX server icon in the tooltray.
- 2** Click **Real-time updates**.  
In the **Marker** menu, the Update window option is enabled.
- 3** Go to *To refresh the emDEX window*.

**To refresh the emDEX window**

- 1 Click the emDEX window.
- 2 Do one of the following:
  - Click **Marker**, and then click **Update window**
  - Press **F5**.

**To set the emDEX window to be always on top**

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Click **Always on top**.

**To use the emDEX Marker editor**

This option controls which editor window appears when you double-click an entry in the emDEX window. If disabled, the FrameMaker® marker window will open.

- 1 Right-click the emDEX server icon in the tooltray.
- 2 Click **Use emDEX marker editor**.  
Once enabled, a checkmark appears next to the option.

## About the emDEX Window

The emDEX window shows the real-time index for the particular document or book. The options found in the Marker menu allow you find, edit, or delete markers. You can also find orphan ranges, check cross-references, and save the window position.

**Edit**

Edit will open the **Marker** dialog box in FrameMaker® for the highlighted index entry. Edit the index entry and then click **Edit Marker**.

**Delete**

Delete removes the highlighted index entry.

Pressing the delete button on the keyboard will also delete the currently selected item.

## Find

Click **Find** to open the emDEX **Find** dialog box. Click **OK** to find subsequent occurrences of the text.

## Replace

Click **Replace** to open the emDEX **Replace** dialog box. Click **OK** to perform a global replace.

## Find orphan ranges

Find orphan ranges will find any start range tags without corresponding end range tags, and vice-versa.

## Check cross-references

Check cross-references searches for any *see* or *see also* tags, and then checks whether the text referenced does exist.

## Update window

**Update window** is only enabled if **Real-time updates** is disabled. **Update window** refreshes the emDEX window.

## Save window position

**Save window position** saves the size and position of the emDEX window. Once set, when emDEX is started, the size and position of the window is set to the last saved position.

## Close window

**Close window** closes the emDEX window.

## About the emDEX Client

The emDEX client is the menu installed on the main FrameMaker® menu. From the menu, you can open the emDEX window and the emDEX Marker window. You can also customize the window size, font, and button functionality.

## Open emDEX window

**Open emDEX window** starts emDEX. If you are indexing a book, open emDEX with the focus on the book file.

## Include marker types

**Include marker types** determines which marker types emDEX displays. The default marker is index. Any changes are saved and used the next time emDEX is started.

## Marker

**Marker** opens the emDEX Marker window. In the MarkerText window you can type the entries, and you can apply formats using the predefined buttons. For more information, see [Using the Formatting Buttons](#).

## Range marker

**emDex Range Marker** automatically adds start and end range tags.

### To add a range marker

- 1 Select all the text to be included in the range.
- 2 From the **emDEX** menu, click **Range marker**.  
The **emDEX Range Marker** dialog box opens.
- 3 Type the index entry and click **New Marker**.  
The start and end ranges markers are automatically set.

## Marker buttons

Use **Marker buttons** to edit, save, or load user-defined buttons. Once you have edited or predefined buttons, you can save the settings to a file. This allows you to set predefined buttons for different documents or client preferences.

The Display Text box is the text that appear in the marker editor window. The ampersand preceding the text defines the shortcut key for that button.

The Action box defines the text that will be inserted in the Marker Text window when you click the button.

**Marker size**

You can set the window size of the emDEX Marker window.

**Marker font**

You can select the font that will be used within the Marker Text of the emDEX Marker window.

**Preparing an Index Using emDEX**

As you index, you can use emDEX to locate and edit the entries as required.

If you click an item in the emDEX window, the focus within FrameMaker® will move to the position of that particular marker. If you double-click on an item in the emDEX window, or press Enter with an entry highlighted, the focus within FrameMaker® will shift, and a marker dialog box will open.

If you have multiple locators for an entry, highlight the whole entry, right-click and select the locator you want to view.

Once you are satisfied with the index, you can generate the index as usual. Again, you can use emDEX to locate and edit the entries after comparing the index results with emDEX.

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## Chapter 3

### FAQs

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Q : Why don't all of my markers appear in the emDEX window?

A : If it's a book you are trying to view, you must start emDEX with the focus on the book file.

A : If you are running the demo version, you will only see the first 100 markers.

Q : When I tried to start emDEX, why did I receive a warning message that the emDEX server is not active?

A : When FrameMaker® is started, the emDEX server icon should appear in the tooltray. If it does not appear, either restart FrameMaker®, or start the emDEX server from Start>Programs>emDEX>emDEX server.

Q : Why is all the imported text highlighted when I click on an index entry that is contained in imported text?

A : FrameMaker identifies index entries in text insets the same way.

Q : Why when I deleted one entry in emDEX other entries were deleted as well?

A : If within one marker you have several entries, deleting one entry will delete all other entries within that marker.

Q : Why is the page number displayed in emDEX different from where the marker is?

A : The marker page is taken from the beginning of the enclosing paragraph.

Q : Why did all the emDEX entries disappear when I closed a file?

A : emDEX will only display markers for open documents. Automatically, emDEX will open all files in the book. Closing a file will remove all the entries in emDEX for that particular file.

Q : I have Real-time updating turned off. When I click on an existing marker emDEX can't find it?

A : You have to refresh the emDEX window before searching for an entry, if changes have been made to the document.

Q : What versions of FrameMaker® will emDEX work with?

A : Versions 5.5, 5.5.6, 6.0, and 7.0.