

USER GUIDE

Cross-References 1.0 Mac/Win

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sub chapter references are hyperlinks

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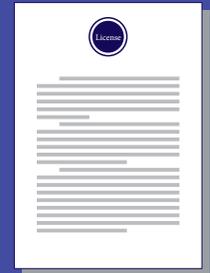
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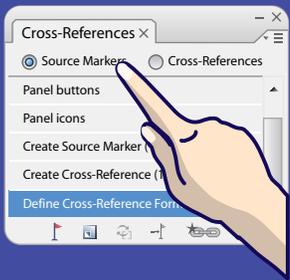
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Cross-References panel

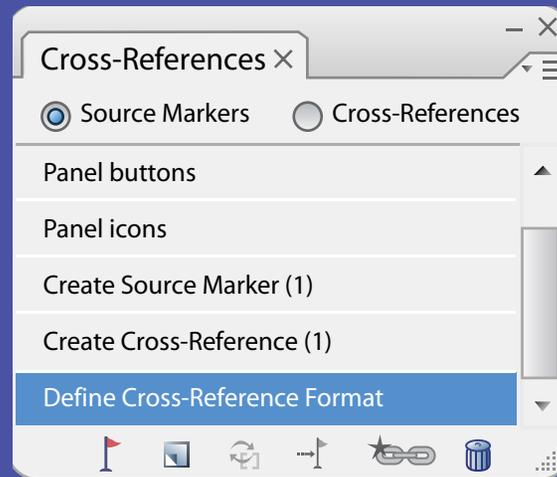


- Cross-References view
- Source Markers view

TIP: To show this panel choose **Window → Cross-References**

Cross-References panel

1.1 Source Markers view



When the **Source Markers** radio button is active in the Cross-References panel, it displays a list of Source Markers in the current document.

Alt+Click on the list item will bring you to the selected source marker.

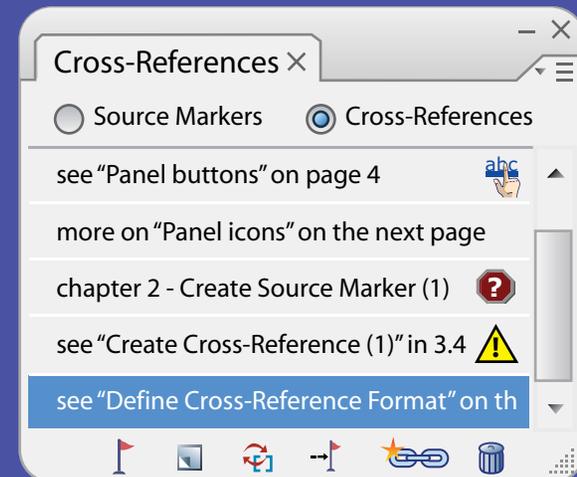
Double click opens **Modify Source Marker** dialog.

Hovering over the item will display the entire marker name, in case it does not fit in the panel.

When Source Markers view is active with no selection only the first two buttons from left are active, **Insert Source Marker** and **Insert Cross-Reference**.

When one or more markers are selected, you can delete them by using the **Trash** button. Nothing else but markers will be affected (you can select entire story containing both markers and cross references, but only the markers will be deleted by clicking the **trash** button in Source Markers view)

1.2 Cross-References view



When **Cross-References** radio button is active, the Cross-References panel displays a list of Cross-References in the current document. Some of their states are indicated by **icons**.

Double click opens **Modify Cross-Reference** dialog.

Alt+Click on the list item will bring you to the selected cross-reference.

Shift+Alt+Click on the list item will bring you to the source marker of the selected cross-reference.

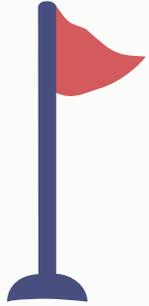
Hovering over the item will display its Source document, Source marker name, Format name, Format definition and time of the last update.

Without selection only the first two buttons from the left are active: **Insert Source Marker** and **Insert Cross-Reference**.

When Cross-Reference is selected, you can **Update**, **Go-to source marker** and **Change Cross-Reference source document**. When the last is clicked with **Alt**, the source document will be set to the current document. For more on External References see page 24

Selected cross-references can be deleted by clicking on the trash button. Even if the selection contains markers and text, nothing but cross-references will be affected when clicking the trash button in the Cross-References view.)

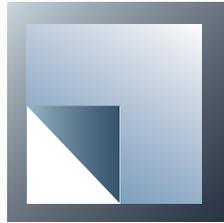
1.8



This button will create a new source marker at the current cursor position.

[For info on how to Insert Source Marker see page 11.](#)

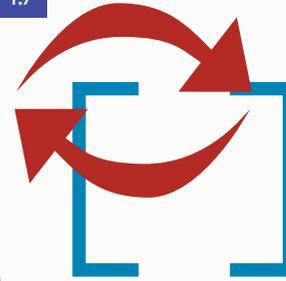
1.6



This button in the Cross-References panel will create a new cross-reference at the current cursor position.

For more information about creating cross-references See ["Insert Cross-Reference" on page 9.](#)

1.7

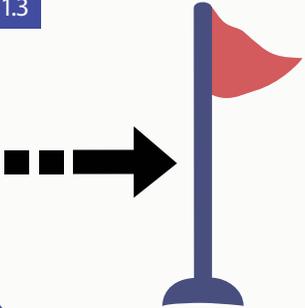


This button updates a reference. Cross-References within open documents are updated live by default, live updating can be turned off.

[More on Manual updates on p. 25](#)

This button is enabled when at least one cross-reference is selected.

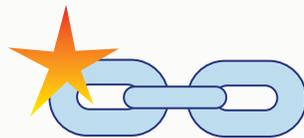
1.3



Go to source marker button will show you a source of a selected cross-reference and highlights the source marker in the list and in the text.

It is only enabled when you select a single cross-reference.

1.4



This button will open the **Choose new source document** dialog for selected reference(s).

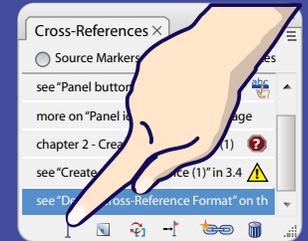
Alt+Click on the button will re-link the reference(s) to a current document.

1.5



This button in the Cross-References panel deletes the selected Cross-Reference(s) or Source Marker(s), depending on the view selected.

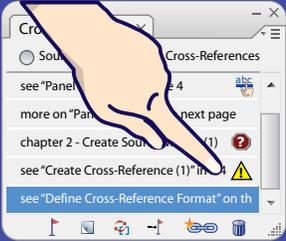
Panel buttons



- **Create Source Marker**
- **Create Cross-Reference**
- **Update Reference**
- **Go To Source**
- **Re-Link**
- **Delete**

TIP: Panel button commands can also be found in the context menu while typing, panel menu, and **Type** → **Cross-References** menu

Panel icons



- Unresolved
- Invalid
- Hyperlinked

1.9

This icon next to the cross-reference in the list indicates a source error. Hovering over the icon will pop up a tool-tip showing the cause of the problem. For more on unresolved references and source errors refer to chapter X-references Maintenance on page 25

1.10

This icon next to the cross-reference in the list indicates composition error in the cross-reference. Hovering over the icon displays a tool-tip showing the cause of the problem. For more on composition errors refer to chapter X-references Maintenance on page 25

1.11

When this icon appears next to the cross-reference name in the list, it means that the reference is also a hyperlink to its source. To change this setting you can either go to Hyperlinks panel and delete the hyperlink, or modify the reference and uncheck **Create Hyperlink**.

Panel menu

- Insert
- Modify
- Updates
- Single reference controls
- Document references controls
- Format Controls

Cross References Panel Menu

Menu in the Cross-References panel (and the same menu in *Type* → *Cross-References*) is divided into 6 areas:

Insertion controls: [Insert Cross-Reference](#) p.9; [Insert Source Marker](#) p.11

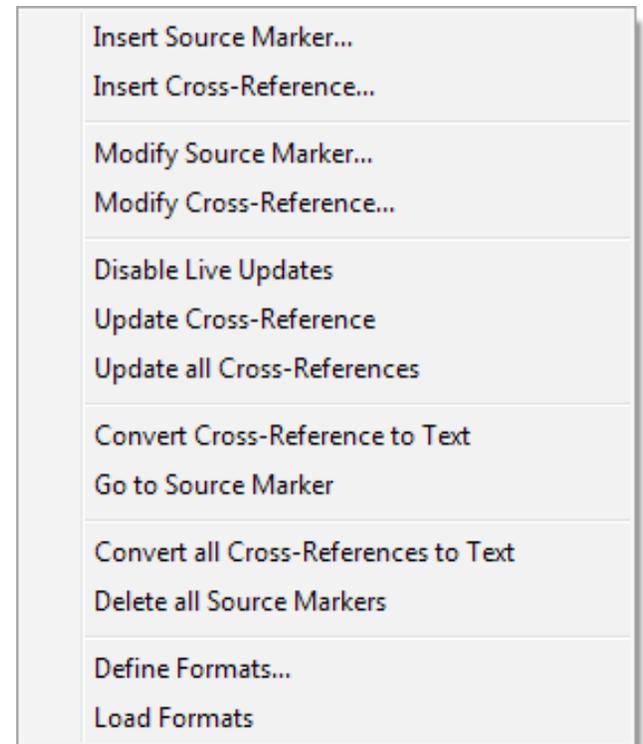
Modification controls: [Modify cross reference](#) p.9; [Modify Source Marker](#) p.11

Update controls: [Live updates](#) p.25; [Manual Updates](#) p.25

Single x-ref controls: [Convert cross-reference to text](#) p.9; [Go to source marker](#) p.5

Document x-ref controls: [Convert cross-reference to text](#) p.9; [Delete All Source Markers](#) p.11

Format Controls: [Format basics](#) p.12; [Loading and saving formats](#) p.12



Context menu controls

To open a cross references context menu:

place click type cursor into a text frame, or select a cross-reference or source marker- Windows - **Right click**; Mac - **Ctrl + Click**
select item **Cross-References** and the menu will pop up.

Different menu variations appear depending on what was selected while opening the context menu:

The diagram illustrates the context menu structure for cross-references. The main menu on the left lists various options, with 'Cross-References' highlighted. Three sub-menus are shown to the right, each corresponding to a different selection state:

- Top sub-menu (No selection):** Contains 'Insert Source Marker...' and 'Insert Cross-Reference...'. A yellow callout box states: "If no source marker or cross-reference is selected, only the **Insert Source Marker** and **Insert Cross-Reference** items will be displayed."
- Middle sub-menu (Source marker selected):** Contains 'Insert Source Marker...', 'Insert Cross-Reference...', and 'Modify Source Marker 'Panel buttons 1 (2)'...'. A yellow callout box states: "If a source marker is selected, **Modify Source Marker** command will be added to the basic menu."
- Bottom sub-menu (Cross-reference selected):** Contains 'Insert Source Marker...', 'Insert Cross-Reference...', 'Modify Cross-Reference "'Create Cross-Reference" on page 6'...', 'Update Cross-Reference "'Create Cross-Reference" on page 6'', 'Convert Cross-Reference "'Create Cross-Reference" on page 6' to Text', and 'Go to Source Marker'. A yellow callout box states: "If a cross-reference is selected, the **Modify Cross-Reference**, **Update Cross-Reference**, **Convert Cross-Reference to Text** and **Go to Source Marker** commands will be added to the basic menu."

Context menu controls

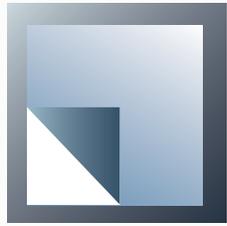
- Type cursor
- Marker selection
- Reference selection

TIP:
Context menu commands apply to the text selection which might differ from the selection icon the panel.

Format controls

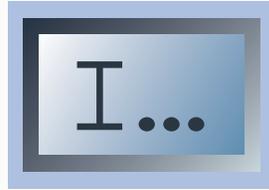
- Insert Element
- Modify Element
- Insert Special character
- Language
- Online Help
- New format
- Modify format

1.12



This button in the **Insert Cross-References dialog - Format Name pane** will create a new format. If you use a reference more than once, we recommend creating a format for it to save time on editing the definition.

1.13



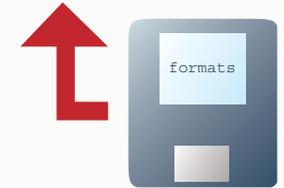
This button opens the dialog for Format editing. Changes from this dialog will be saved in the format, unlike the changes made in the **definition field** of **Insert Cross-References dialog**.

1.14



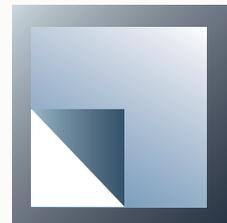
This button deletes a format definition. All cross-references using this format will keep the definition as a Custom Format.

1.15



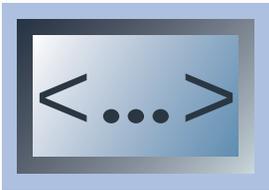
To loads formats from other documents, push this button and select a document to load from. Your format settings are saved into any InDesign document. To save default settings, create a new document and save it (the document can be empty).

1.16



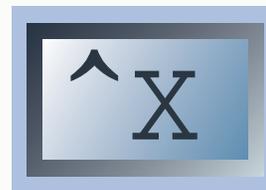
This button in the **Format Definition Pane** will open **Insert format element dialog** and insert a format element at the cursor position.

1.17



To modify already inserted element press this button in the **Format Definition Pane** while the element is selected. Only one element can be edited at a time.

1.18



To insert a special character as static text in your format definition, push this button. [For more on Special characters see page 13](#)

1.19



This button in the Cross-References panel will roll out a menu with available languages. Elements with languages selected will only appear in text using this language as a character attribute. [For more on Language dependent elements and text see page 19](#)

TIP: To select an element to be modified, it is sufficient to just place a cursor between its opening and closing angle brackets.

Create cross reference

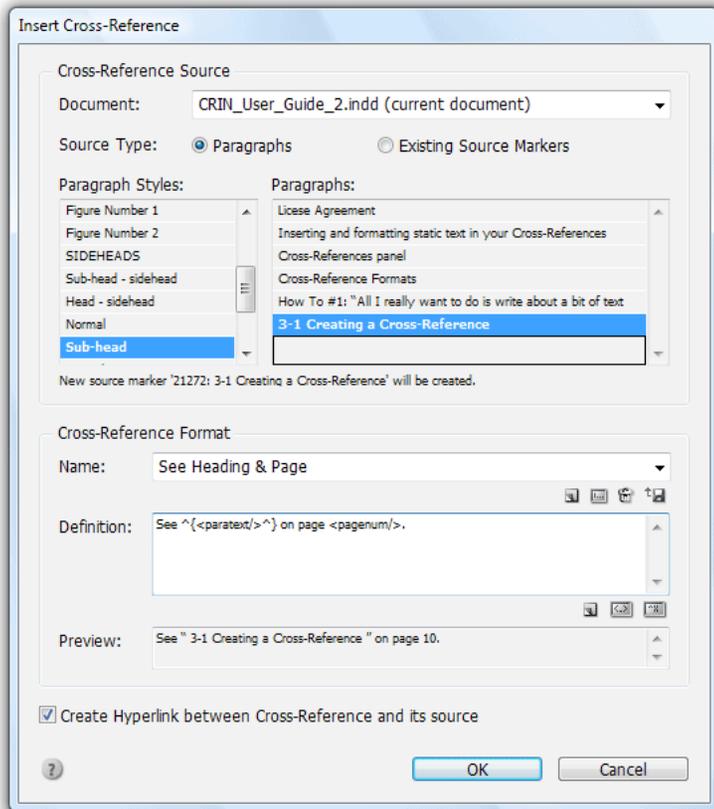
To create a new reference, first choose a position in text where you want your reference to be.

A/ Click  in the [Cross-References panel](#)

B/ [Panel menu](#) → **Insert Cross-Reference**

C/ [Context Menu](#) → **Cross-References** → **Insert Cross-Reference**

To open **Insert Cross-Reference** dialog:



Choose source document (current by default) and type of source. **Paragraphs** option will display two lists, one on the left with all paragraph styles, the second on the right listing all paragraphs using the selected style. Your cross-reference will lead to the highlighted paragraph. When a paragraph is selected, you will see whether a new marker will be created and its name, or name of the existing marker in the paragraph.

Existing Source Markers option will list all source markers created in the selected document. These can be either created manually via [Insert Source Marker - more on page 11.](#)

Choose a **Cross-Reference Format**. Format definition influences how the resulting reference will look and how it will describe the source and its location. You can either choose a name of the existing format, or create a new definition (either from scratch or from an existing one). In this case your cross-reference will display it has "Custom format" [For more on Cross-Reference Format Basics see page 12](#)
Composed reference will be marked by `[cross-reference tags]` when **Type** → **Show hidden characters** (**Alt+Ctrl+I**) is turned on

Modify cross reference

The reference source can be changed and its format modified at any time. **Double click** the cross-reference in the panel to open a modification dialog which is the same as when inserting a reference. If you only want to remove the hyperlink, you can also do it by deleting it in the hyperlinks panel.

Delete cross reference

If you want to delete a cross-reference, you can delete it either by deleting the reference the same way as normal text, or by choosing one or multiple cross-references and clicking  button in the [Cross-References view](#) fig. 1.2

Convert cross-reference to text

When you want to freeze the appearance of the reference, you can select it and choose **Convert Cross-Reference to Text** in either of the menus. The same can be done with all document references at once using **Convert All Cross-References to Text** command.

Cut & paste, copy & paste references

When a cross-reference is cut or copied and pasted, its name remains the same, and the copied references will be linked to the same source as original.

When you copy and paste the cross-reference and its marker, the reference will remain linked to the original source marker.

Insert Cross-Reference

- Create cross-reference
- Modify cross-reference
- Delete cross-reference
- Convert cross-reference to text
- Cut & Paste, Copy & Paste References

Insert Cross-Reference

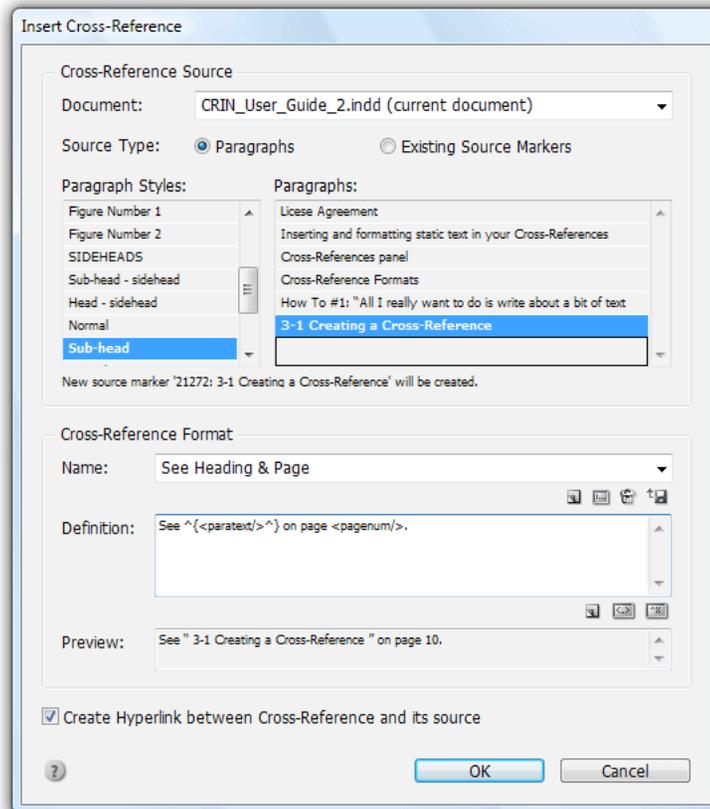
- How to

How To: “All I really want to do is write about a bit of text within document and refer to a page on which it appears.”

STEP 1 Let’s say you want to refer to the following text formatted with the paragraph style “Subhead”:

3-1 Creating a Cross-Reference

STEP 2 Place the cursor where you want the reference to be and open *Insert Cross-Reference* dialog¹



TIP: Multiple references can point to the same source.

¹ *Context menu* → *Cross-References* → *Insert Cross-Reference*, or click the  button in the *Cross-References panel*, or *Cross-References panel menu* → *Insert Cross-Reference*, or *Type* → *Cross-References* → *Insert Cross-Reference*

STEP 3 Choose *Paragraphs* as a Source for your reference. Select Paragraph Style “Subhead” and find “3-1 Creating a Cross-Reference” text in the list.²

STEP 4 Choose the Cross-Reference Format you want to use. If you only want to refer to a page, choose the Page format. The resulting reference will look like this: “*page 3*”:

By modifying the format you can add your custom words and elements. This is the definition of the default format “*Page*”:

```
page^s<pagenum/>
```

When you add “See” before the default words - *See page^s <pagenum/>* - the resulting reference becomes “*See page #*”

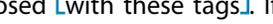
If you want all references using this format to look like this you need to modify the format by clicking  button in the Insert Cross-Reference dialog.

Preview: This field shows the Cross-Reference which will be created. There are two error messages that can appear in this field:

“*No Cross-Reference source selected*”: please select a source you want to refer using one of the described methods.

“*Invalid format definition*”: please check whether you have not accidentally written over a part of element. All elements have to start with < character and end with / and > characters (except for span, which can have opening and closing form) with no extra spaces. If you are unsure of what is wrong, please try selecting one of the default formats. [For more on Cross-Reference Format Basics see page 12](#)

STEP 5 The bottom checkbox state determines whether the cross reference will act as a hyperlink to the source in the PDF output. This means that clicking on the cross-reference text in the pdf output will bring you to the place of a source.

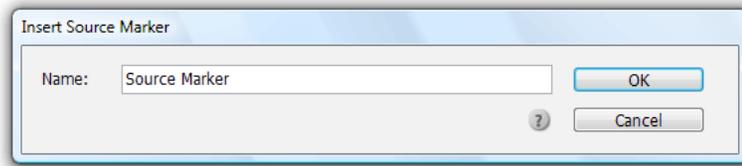
STEP 6 Click OK. The new Cross-Reference will be added in place of your text cursor and in the Cross-References panel list. The reference will be enclosed . If you want to change any of the settings just double click on the reference in the panel list, or select it in text and choose “*Modify Cross-Reference*” from any of the Cross-Reference menus.

² In a longer document it might be difficult to find the paragraph you need using only the style filtered search. To make the search easier, you can insert a Source Marker in the desired paragraph first. When creating a reference to such paragraph, Choose Source - Use Existing Source Marker and find the name of the marker in the list. The list contains all manually created source markers, as well as source markers generated when inserting a reference (these have a unique number and source paragraph text in the name). You will also see the page the Source Marker is currently on.

Insert Source Marker

Place the text cursor where you want the source located

- A/ Push the  button in [Cross-References panel](#) - (fig.1.8,p.5)
 - B/ [Cross-References panel](#) → [Source Markers view](#) → **Insert Source Marker**
 - C/ [Context Menu](#) → **Cross-References** → **Insert Source Marker**¹
- The following dialog will appear:



Choose a name for the marker (a default name is created using the first 60 characters of the current paragraph)

This serves for manual marking of source to which your reference will lead. In complex texts this might save time when creating references - you won't have to search all paragraphs according to used style, but just the list of pre-created markers sorted by page.

If **Type** → **Show hidden characters** (*Alt+Ctrl+I*) is turned on, marker will be represented by this image: 

Modify Source Marker

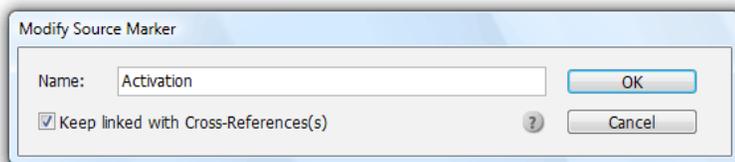
Choose a marker you want to modify.

A/ Select the marker symbol in text (selection can contain text around, it, but only as a single marker)) and choose [Context Menu](#) → **Cross-References** → **Modify Source Marker**

B/ **Double click** the marker in the [Cross-References panel](#) → [Source Markers view](#)²

C/ Select the marker in the panel and choose **Cross-References panel menu** → **Modify Source Marker**

The following dialog will pop up:



¹ Insert Source Marker dialog can also be opened from: **Type** → **Cross-References** → **Insert Source Marker**

² Or select it and choose **Cross-References panel menu** → **Modify Source Marker**

Change the name of the marker and indicate whether you want to keep current cross-references linked to this marker, or whether you want to break the connection. If there are any unresolved cross-references leading to the marker name you've chosen, they will be linked to the modified source marker.

Cut & Paste, Copy & Paste Markers

When a source marker is cut and pasted, its name remains the same and all cross-references remain linked. When you copy and paste the marker, a copy will be created with a number indicating the ordinal number of the copy. Cross-references will remain linked to the first source marker.

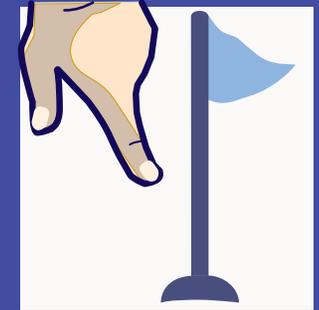
Delete Source Marker

If you want to get rid of unused or redundant source marker, you can delete it either by deleting the marker the same way as text, or by choosing one or multiple source markers and clicking  button in the [Source Markers view](#) fig. 1.1

Delete All Source Markers

After you've converted all your references to text, you can get rid of the markers. If you do it the other way round you will see a lot of unresolved references. Do not panic though, the references remain in their last known state, so they can still be converted to text. For more see [Delete all source markers](#) on page 26

Source Marker



- [Insert Source Marker](#)
- [Modify Source Marker](#)
- [Cut & Paste, Copy & Paste Markers](#)
- [Delete Source Marker](#)
- [Delete All Source Markers](#)

Cross-Reference Formats

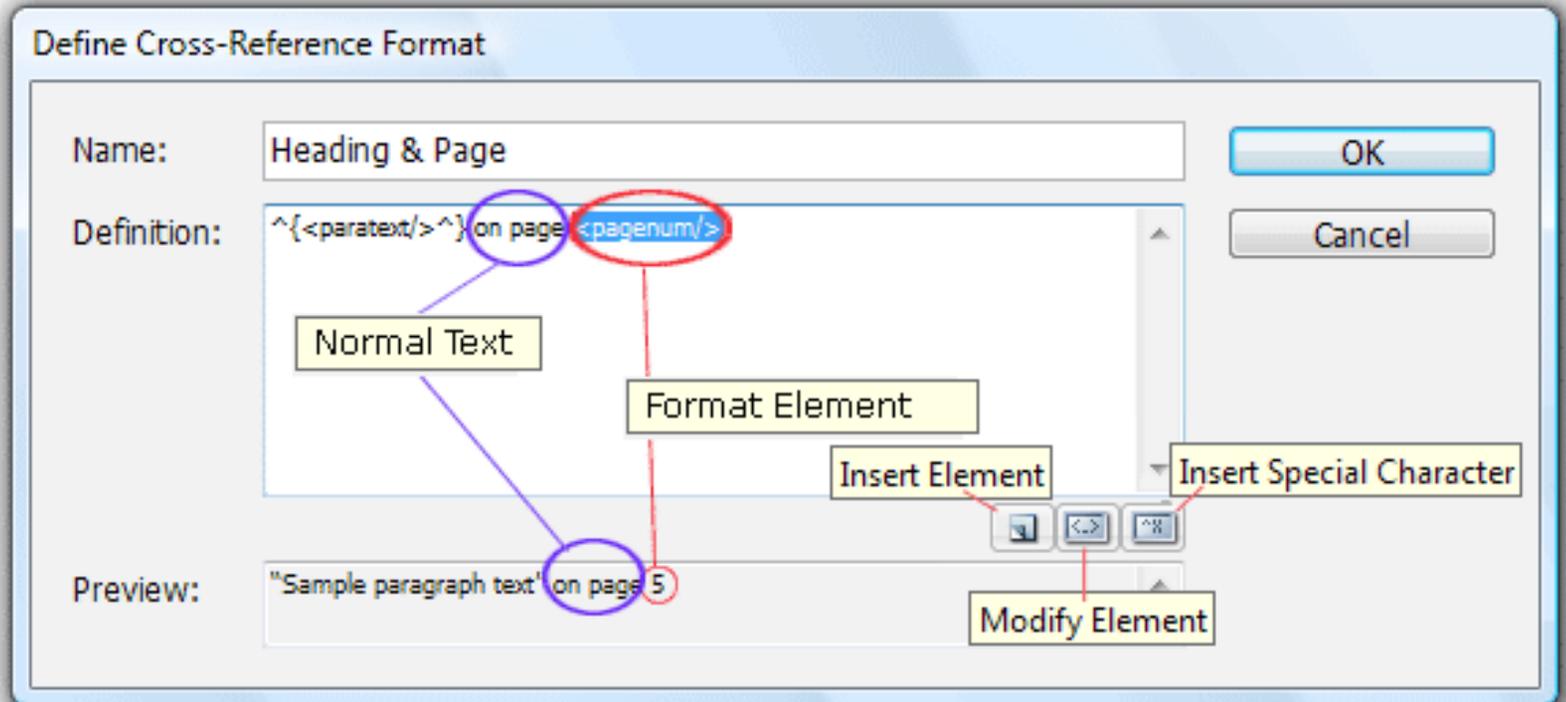
see page <pagenum/>



- Format basics
- Creating new formats
- Loading and saving formats

Cross-Reference Format Basics

Cross-reference composition is driven by its format, defined in XML. Formats consist of static text (including special characters) which will appear in every reference using the format and variables represented by elements. Every part of text and every element, can use specific character styles or style overrides and can be [Language dependent](#). To create a new format choose **Cross-References panel menu**¹ → **Define Formats** → **New** - the following dialog will appear:



When creating a format, first type a unique name in the **Name** field. Then create your format in the **Definition** field. Definition fields can contain static text ([more on page 13](#)) and information about the source and its position represented by elements. Elements can be added using **Insert element** button and subsequent Insert Cross-Reference Format Element dialog ([pages 14–19](#)). Users who prefer to type the code by themselves can do so. ([For more on XML elements see page 20](#)) A DTD is also available. Format settings work the same way as any other InDesign preferences - when no documents are open, the new format will stay in the settings, if some document is open, the format is specific to this document.

Loading and saving formats

Choose **Cross-References panel menu**¹ → **Load Formats** and select a document containing cross-references to load the definitions. To quickly add to the default formats you can download documents containing format definitions from www.dtpools.com/cross-references. Format settings work the same way as any other InDesign preferences. When no documents are open, the loaded formats will be loaded to InDesign workspace. If any documents are open, the format will be loaded only to active document.

To save your custom formats, create a new document and save it immediately after creation. This document will contain the current definitions of formats and the formats can be loaded from it on any computer running the Cross-References plug-in.

¹ the same can be achieved via **Type** → **Cross-References** → **Define Formats** → **New**

TIP: Additional format definitions can be downloaded from www.dtpools.com/cross-references

Inserting and formatting static text in your Cross-References

Apart from the variable elements as content or position of the source, references can also contain static text.

A good example is the default format “Heading & Page” When you choose to edit this format in the **Define Cross-Reference Formats** dialog, you will see the following definition: `^<paratext/>^} on page <pagenum/>` .

The expressions in italics are the format elements, the text in bold is the static text which will appear in every cross-reference using this format. These characters `^<` represent double left quotation mark¹.

To include static text in your cross-reference format, you can type the text directly into the format **Definition** field next to the elements; example: `Figure <paratext cstyle= filterbycstyle=“Figure #”/>`

This format will create a reference which will always contain the word Figure and a quote of the source paragraph words formatted using the “Figure #” Character style. Such formatting can be useful when referencing illustrations. To use a specific Character style for the word “Figure” select the word in the **Define Cross-Reference Formats** dialog:

```
<span cstyle=“character style name”> Figure </span>
```

`` is a code for Character override element you can find in the Insert Cross-Reference Format Element dialog

When using character styles while formatting remember that InDesign style names are case sensitive.

¹ The same way of displaying special characters is used in InDesign’s footnotes dialog or find/replace dialog. A list of all available metacharacters can be found on [this page](#).

Special characters

The following special characters can be added as static text to the format definition either from the menu or by typing the code directly in the definition:

•	Bullet Character	^8
^	Caret Character	^^
©	Copyright Character	^2
...	Ellipsis	^e
¶	Paragraph Symbol	^7
®	Registered Trademark Symbol	^r
§	Section Symbol	^6
™	Trademark Symbol	^d
—	Em Dash	^_
-	En Dash	^=
	Discretionary Hyphen	^-
-	Nonbreaking Hyphen	^~
	Em Space	^m
	En Space	^>
	Flush Space	^f
	Hair Space	^
	Nonbreaking Space	^s
	Thin Space	^<
	Figure Space	^/
	Punctuation Space	^.
“	Double Left Quotation Mark	^{
”	Double Right Quotation Mark	^}
‘	Single Left Quotation Mark	^[
’	Single Right Quotation Mark	^]
	Tab Character	^t

You can insert these characters either by clicking the  button and selecting from the list, or by copy/pasting either the metacharacter code or directly typing the character into the definition field.

Cross-Reference Formats

- Inserting and formatting Static Text
- Special characters

TIP: When inserting static text keep in mind that variable elements will change. Make the text prepared for every alternative.

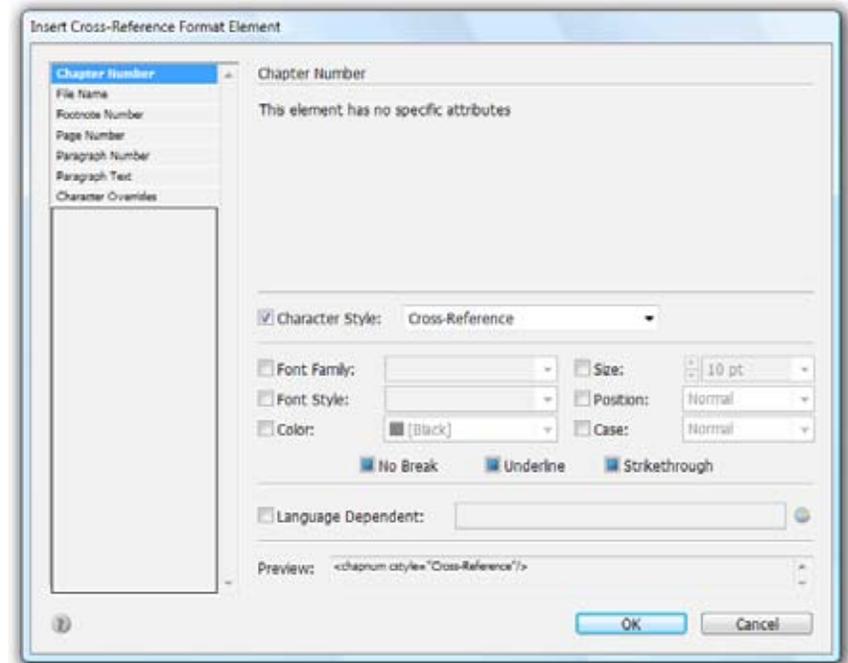
Cross-Reference Format

- Chapter number (CS3 only)
- File Name

Chapter Number

This element displays the number of the chapter your source is in. It has no specific attributes to be set. The XML code of this element is `<chapnum/>`

To insert the element into your format definition click **Insert** button when **Chapter Number** is selected in the list on the left.

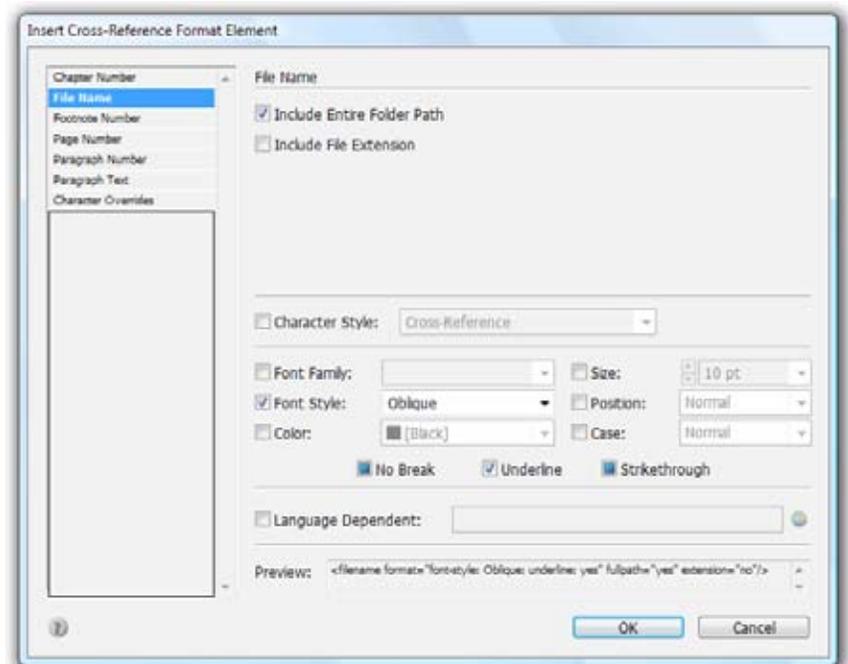


File Name

This element displays the name of a file your source is in. You can choose whether the file name will include a full path to the document location (attribute *fullpath*) and whether you want the file name to also show the extension (attribute *extension*). The XML code of this element is `<filename/>`.

This element is mainly used for External References ([more on External References on page 24](#)).

To insert the element into your format definition click the **Insert** button when **File Name** is selected in the list on the left.



TIP: Chapter number element will not display anything in CS2, but will remain part of the format and work correctly in CS3

Footnote Number

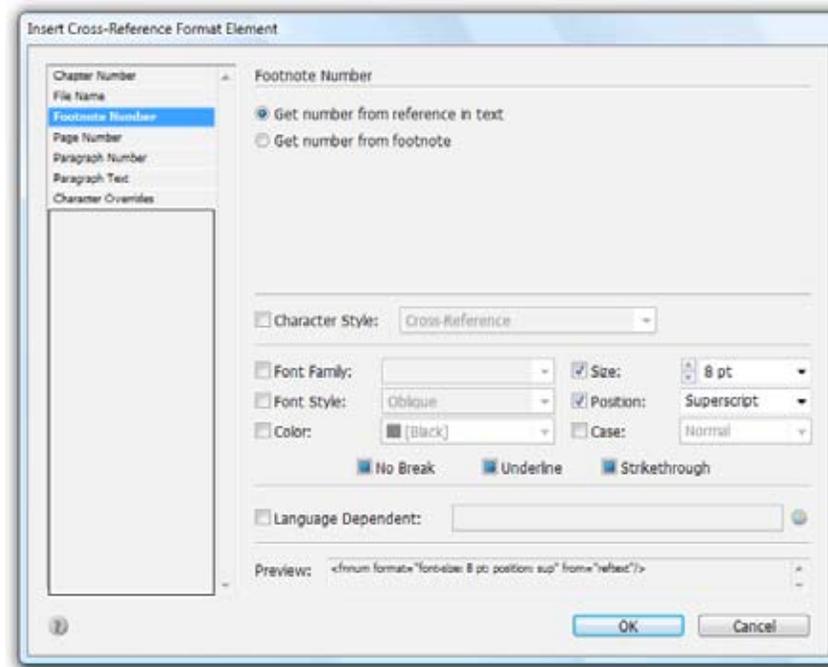
References can also point to footnotes. To refer a footnote number use the Footnote number element - `<fnnum/>`

Since prefixes and suffixes of footnotes can vary in text reference and in the actual footnote, you can choose which of the two will display.

Using this element is useful when you need one footnote for more instances in text, with this reference element you can use the standard footnote for the first instance and cross-reference for the rest. You can also create a character style to format the footnote number in reference the same way as a normal footnote.

To insert the element into your format definition click the **Insert button** when **Footnote Number** is selected in the list on the left.

If you want to create footnotes like a pro, see *Real World Adobe InDesign CS2* p.215-221.



Page Number

This element displays the reference to the page your source is in. The reference in its basic setting is just the number assigned to the page. The XML code for this element is `<pagenum/>`. By using the attributes of this element you can create relative references such as “opposite page”. Use Preceding Paragraph With Style: you can either make your references point directly to the place where source marker is, or to the first preceding paragraph using the specified style. If no such text exists in the story, the current paragraph/marker position will be used. This can be useful when you are pointing to the specific text in a paragraph, but want readers to find it easily using first available sub-head. (`precedingstyle="Sub-head"`). Remember that style names in InDesign are case sensitive.

Include Section Name: references to the page will contain page number and section names (as set in **Pages -> Numbering and section options**) (`usesectionname="yes"`)

Always Use Arabic Numerals: 1,2,3,4,... style will be used regardless of the settings in page numbering options (`forcearabic="yes"`) ‘page #’: when checked without value filled- default word “page” will be added before page number. (`usepage="yes"`)

“Page #” text in the edit box will be used in the page reference. The # character in customized text marks the place where the page number will be used. Omitting the # character will lead to a reference without a number displayed (`pagetext="page numéro #"`).

Relative references: When the source is on the same or neighboring page as the reference, its position can be described by words instead of just the page number. By checking the following fields you can choose which of these relative references to use when applicable and customize/localize them if needed.

“this page”: When the source is on the same page as reference, its position can be described by the words “on this page” instead of just the page number. If you wish to use this form of a relative reference check this field. (`usethis="yes"`) Words you fill in the edit box on the left will replace the default English “this page” (`this text="cette page"`).

Cross-Reference Formats

- Footnote number
- Page number

TIP: Footnote number element can be used to create auto-updated footnote references in tables - this is not possible to do in InDesign. Insert real footnote number above or below table and assign them paper color. Cross-reference with just Footnote number element will replace them in table,

Cross-Reference Format

- Page number (Continued)
- How to make a localized relative page reference

“next page”: When the source is on the page following the page with the reference, its position can be described by the words “on next page” instead of just the page number. If you wish to use this form of a relative reference check this field. Words you fill in the edit box on the left will replace the default English “next page”.

“previous page”: When the source is on the page preceding the one with the reference, its position can be described by the words “on previous page” instead of just the page number. If you wish to use this form of a relative reference check this field. Words you fill in the edit box on the left will replace the default English “next page”.

“opposite page”: When source and reference are on different pages on the same 2 page spread, their mutual position can be described by the words “opposite page” instead of just the page number. If you wish to use this form of a relative reference check this field. Words you fill in the edit box on the left will replace the default English “opposite page”. This relative reference overrides the Next page and the Previous page references when applicable.

To insert the element into your format definition click the Insert button when Page Number is selected in the list on the left.

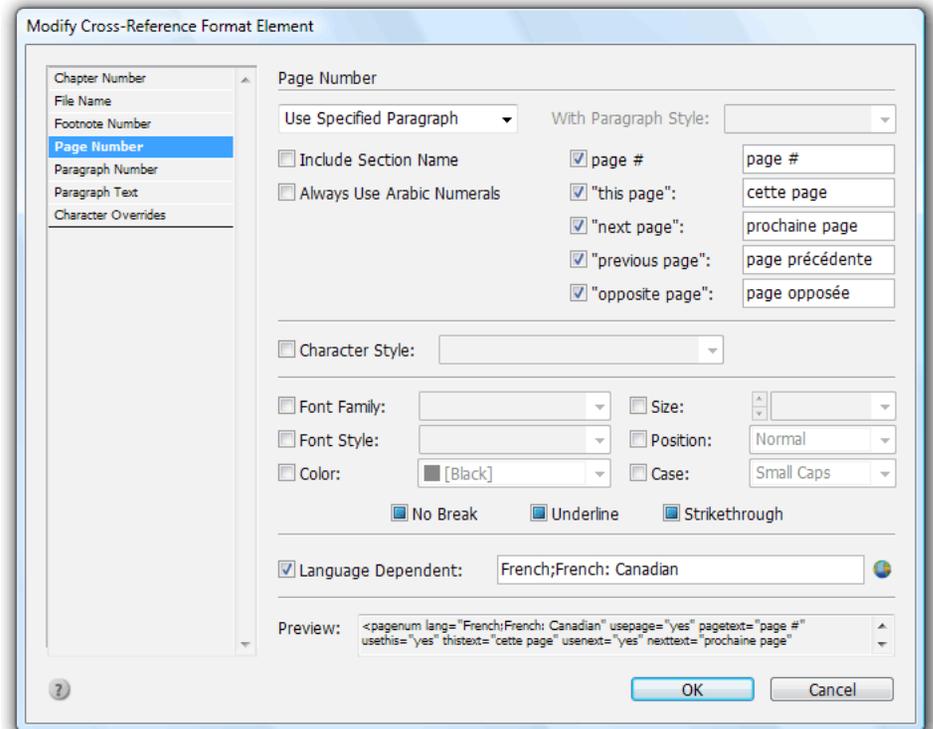
How to make a localized relative page reference

Settings in this dialog will create the following XML element in your format definition:

```
<pagenum lang="French;French: Canadian" usepage="true" pagetext="page numéro #" usesthis="true" thistext="cette page" usenext="true" nexttext="prochaine page" useprev="true" prevtext="page précédente" useopposite="true" oppositetext="page opposée"/>
```

In plain language it means that the page reference will only appear in French text. It will show the number of the page where the first heading is before the marker. It will show the page number as set, without forcing arabic numerals and it will not mention section name. All page references will be in French and in case the reference will point to neighboring pages, appropriate relative description will be used instead of plain page number. Page number will be displayed as “page numéro 6”, as set by the description “page numéro #”

This modification can be set for each of your elements separately. By adding elements with standard words replaced by their translation and the language dependency set to appropriate language, you can create a reference which will always point to the source in the language of the text it's in.



TIP: Additional format definitions can be downloaded from www.dtpools.com/cross-references

Paragraph Number

This element displays the number of the paragraph your source is in. This is useful when you use automatic paragraph numbering via *Paragraph Styles Options* → *Bullets and Numbering* → *List Type: Numbers*. XML code for this element is `<paranum/>`.

You can choose whether to include an entire paragraph number or just the current level. (When you want to refer to figures in chapter 1.4 numbered 1.4.1, ..., you can also use only the last number - See figure 1 on this page).

Remember that if you want to convert numbering to text, you either need to change the element to Paragraph Text, or convert the cross-reference to text first. [For more on Converting references to text see page 25](#)

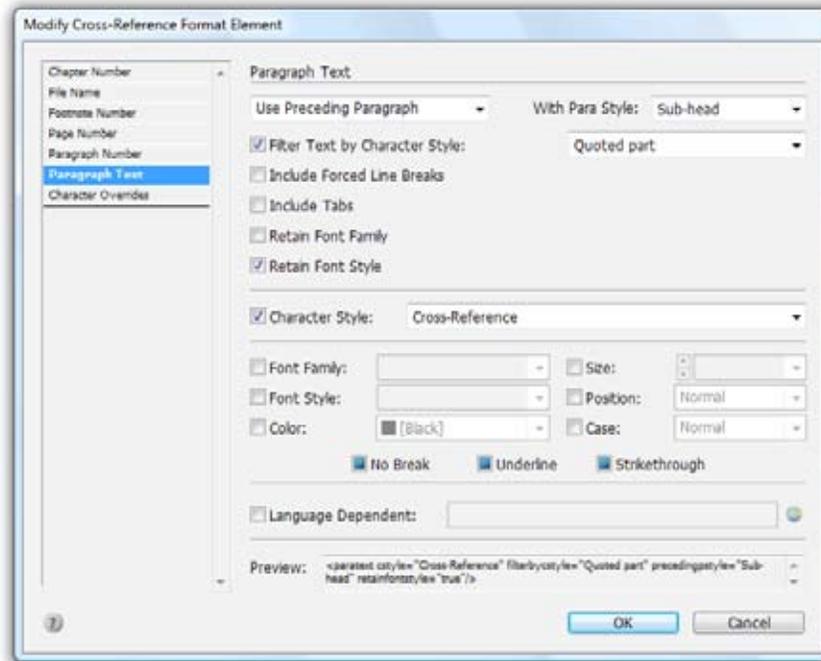
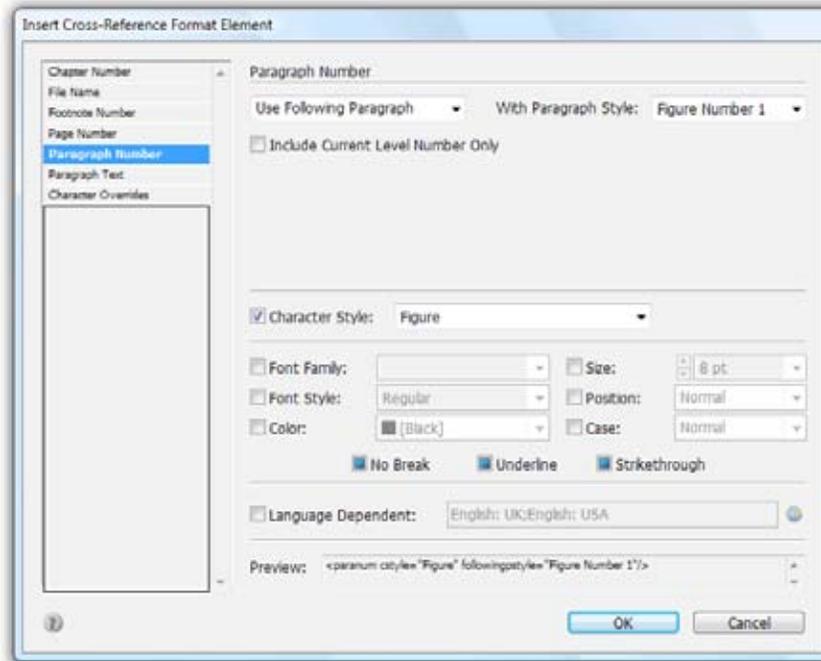
To insert the element into your format definition click the **Insert button** when Paragraph Number is selected in the list on the left.

Paragraph Text

This element quotes the source paragraph. XML code for this element is `<paratext/>`.

Use Preceding Paragraph With Style: you can either make your references point directly to the place where the source marker is, or to the first preceding paragraph using a specified style. If no such text exists in the story, the current paragraph/marker position will be used. This can be useful when you make sure you are pointing to the specific text in paragraph, but want readers to find it easily using first available sub-head. (`precedingstyle="Sub-head"`). Remember that style names in InDesign are case sensitive.

Filter Text by Character style: By enabling this feature and selecting a specific style in the combo box you can limit the quoted content down to the text using this style. (`filterbycstyle="Sub-head Bolded Underlined"`) Some of the references in this book point to a specific subhead and localize it by also displaying the heading of the sub-head. This can be achieved by using two paratext elements in one definition each with different settings: `<paratext precedingstyle="Heading"/> <paratext precedingstyle="Sub-head" >`



Cross-Reference Formats

- Paragraph number
- Paragraph Text

TIP: If you plan to convert numbering to text, choose a specific character style for the number. To keep your references working after converting numbering you only need to change `<paranum/>` to `<paratext filterbycstyle="Figure"/>`

Cross-Reference Format

- Paragraph text (continued)
- Character overrides
- How to apply formatting to entire reference or just part

Include Forced linebreaks / Tabs: When selected, source paragraph is quoted including forced line breaks or tabs. Tabs do not retain the settings from original paragraph and use settings from the paragraph the reference is in.

Retain Font Family / Font Style: These two settings determine whether the font family or font style of the original text will be used when composing the reference. This can be useful when you are using special fonts and styles in your text as in this sample reference to the previous page "[Paragraph Styles Options](#) → [Bullets and Numbering](#) → [List Type: Numbers](#)"

List Type: Numbers"

Character overrides

Each part of the reference format can have its Character Style assigned, or can have specific overrides (e.g., page and paragraph numbers can always be bold). Styles and overrides can be set for every element.

If you wish to have an entire reference or reference part formatted by the same style, it is easier to format it all at once instead of changing the settings manually for each element. Character Override elements also format the static text in your reference. Select the text you want to format and click the  button for a new element. The desired override will apply to the selected text (`< span>your text< span/>`)

How to apply formatting to entire reference or just part

If we want the format definition from the "Filter Text by Character style:" on previous page to use the standard character style Cross-Reference, we could set it to both elements separately like this:

```
<paratext cstyle="Cross-Reference" precedingpstyle="Heading"/>
<paratext cstyle="Cross-Reference" precedingpstyle="Sub-head"/>
```

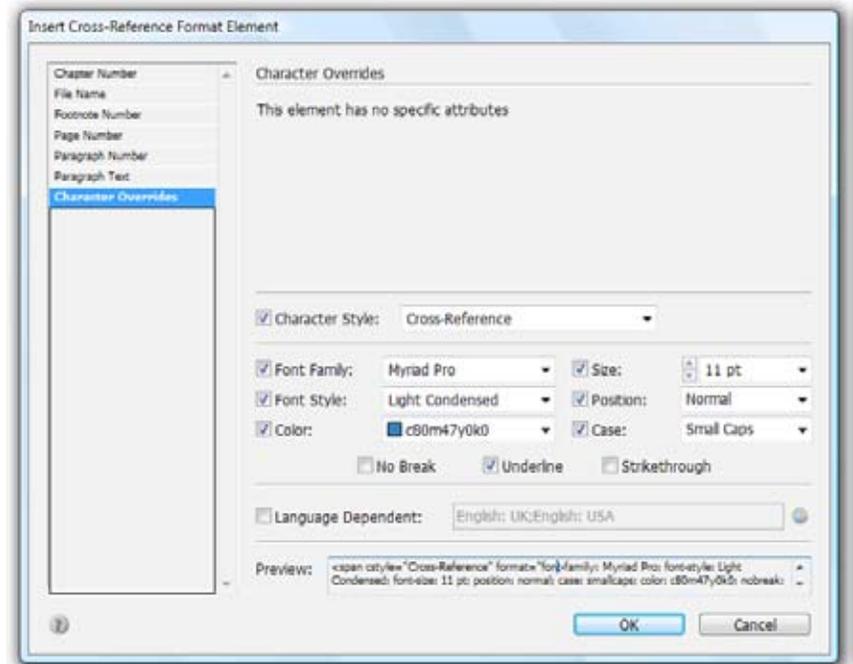
The reference pointing to the current chapter and using this definition would look like this: [Cross-Reference Format Character overrides](#) .

An easier solution (which will also take care of the missing underline between elements) is to apply the formatting to both elements:

```
<span cstyle="Cross-Reference"> <paratext precedingpstyle="Heading"/> <paratext precedingpstyle="Sub-head"/> <span/>
```

When you need different character attributes for each part of the reference as used here: [Cross-References panel](#) → [Source Markers view](#) , select

```
<paratext cstyle="Cross-Reference" precedingpstyle="Head - sidehead"/><span format="font-family: Wingdings">à</span> <paratext cstyle="Cross-Reference"/>
```



TIP: Cross-references in this user guide use character style "Cross-Reference". When used on blue background, text color is overridden in the format settings to white and forced underline. In TOC listing sub-heads, font size is the overridden attribute.

Language dependent elements and text

You can choose which text of the reference will display and what kind of reference will be used automatically depending on the language set to your text in the **Character Styles -> Advanced Character Formats** or in the bottom part of InDesign's Character panel¹

When editing an element or character override of static text, press the  button in the **Insert/Modify format element** dialog and choose the languages in which the element should display.

Attribute `lang="..."` will be added to your element indicating languages where such element will display.

Now let's take one more look at the reference we've created in "How to make a localized relative page reference" on page 16.

This is the format definition, which will display relative page references in French when in French text and nothing in any other text.

```
<pagenum lang="French;French: Canadian" usepage="true" pagetext="page numéro #" usethis="true" thistext="cette page" usenext="true" nexttext="prochaine page" useprev="true" prevtext="page précédente" useopposite="true" oppositetext="page opposée"/>
```

This element will only display English relative page references in any English text:

```
<pagenum lang="English: USA;English: UK;English: Canadian" usepage="true" pagetext="page #" usethis="true" thistext="this page" usenext="true" nexttext="next page" useprev="true" prevtext="previous page" useopposite="true" oppositetext="opposite page"/>
```

When we combine the two, we get a self-localizing page reference for English/French publications:

```
<pagenum lang="English: USA;English: UK;English: Canadian" usepage="true" pagetext="page #" usethis="true" thistext="this page" usenext="true" nexttext="next page" useprev="true" prevtext="previous page" useopposite="true" oppositetext="opposite page"/><pagenum lang="French;French: Canadian" usepage="true" pagetext="page numéro #" usethis="true" thistext="cette page" usenext="true" nexttext="prochaine page" useprev="true" prevtext="page précédente" useopposite="true" oppositetext="page opposée"/>
```

If we want to say more than just "Page #", or "this page", we can add localized static text "See" for English and "Voir" for French the same way:

```
<span lang="French;French: Canadian">Voir</span><span lang="English: USA;English: UK;English: Canadian">See</span> <pagenum lang="English: USA;English: UK;English: Canadian" usepage="true" pagetext="page #" usethis="true" thistext="this page" usenext="true" nexttext="next page" useprev="true" prevtext="previous page" useopposite="true" oppositetext="opposite page"/><pagenum lang="French;French: Canadian" usepage="true" pagetext="la page numéro #" usethis="true" thistext="cette page" usenext="true" nexttext="la prochaine page" useprev="true" prevtext="la page précédente" useopposite="true" oppositetext="la page opposée"/>
```

Note that French grammar required an addition of the article before some of the relative references to combine with "Voir"

Now we create a reference to this story in text set as French: Voir cette page

Now the copy pasted reference in English text: See this page

Cross-Reference Formats



- Language dependent elements and text

¹ more on assigning a Language in Real World Adobe InDesign CS2 p.253, figure 4-16 Assigning a Language

XML elements

- Chapter number
- File name
- Footnote number

Chapter Number

In place of the <chapnum/> element, chapter number where the source is will be rendered in the reference.

<chapnum/>		
Attribute	Value	Description
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format</i>	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2;...]	If this attribute is present, element will only display values in text with the listed language set.

File Name

In place of the <filename/> element, file name of the document where the source is will be rendered in the reference.

<filename/>		
Attribute	Value	Description
<i>fullpath</i>	to show full path - ["true"] by default [fullpath="false"]	Full path to the source document can be part of the source document file name element.
<i>extension</i>	to hide source file extension - ["false"] by default [extension="true"]	Source document can be referenced with our without file extension.
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format</i>	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2;...]	If this attribute is present, element will only display values in text with the listed language set.

Footnote number

In place of the <fnum/> element, footnote number of the paragraph where the source is will be rendered in the reference.

<fnum/>		
Attribute	Value	Description
<i>from</i>	to get the number from the reference in text - ["reftext"]; the number from footnote is used by default	Format on the footnote number can differ in text and in the footnote. (see Real World Adobe InDesign CS2 p.215-221.) you can choose which of the two to use in reference.
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format</i>	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2;...]	If this attribute is present, element will only display values in text with the listed language set.

Page Number

In place of the <pagenum/> element, number or relative location of the page where the source is will be rendered in the reference.

<pagenum/>		
Attribute	Value	Description
<i>precedingpstyle</i>	Paragraph style [name or full path in form of Group Name:Style Name]	Text flow where source marker is will be searched and position of the first preceding paragraph using selected paragraph style will be considered when referring to a page.
<i>followingpstyle</i>	Paragraph style [name or full path in form of Group Name:Style Name]	Text flow where source marker is will be searched and position of the first following paragraph using selected paragraph style will be considered when referring to a page.
<i>usesectionname</i>	false by default, to show section name with page number - [true]	Section prefix can be displayed together with page number.
<i>forcearabic</i>	false by default, to only use arabic numbers for page number - [true]	Page numbering options allow non-arabic numerals to be used, this attribute overrides the optional numbering
<i>usethis</i>	["true"] - thistext="..."	attribute changes page number reference to "this page" or any text value in the <i>thistext</i> attribute when applicable
	["false"] - default	
<i>usenext</i>	["true"] nexttext="..."	attribute changes page number reference to "next page" or any text value in the <i>nexttext</i> attribute when applicable
	["false"] - default	
<i>useprev</i>	["true"] - prevtext="..."	attribute changes page number reference to "previous page" or any text value in the <i>prevtext</i> attribute when applicable
	["false"] - default	
<i>useopposite</i>	["true"] - oppositetext="..."	attribute changes page number reference to "opposite page" or any text value in the <i>oppositetext</i> attribute when applicable
	["false"] - default	
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format'</i>	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2;...]	If this attribute is present, element will only display values in text with the listed language set.

XML elements

- Page number

XML elements

- Paragraph number
- Paragraph text

Paragraph Number

In place of the <paranum/> element, number of the source paragraph will be rendered in the reference, if source paragraph has such number.

<paranum/>		
Attribute	Value	Description
<i>numberonly</i>	to show full path to the source document ["true"] by default [<i>numberonly</i> ="false"]	This attribute determines whether the element will use all characters from the numbering definition, or just numbers.
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format</i> ¹	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2; ...]	If this attribute is present, element will only display values in text with the listed language set.

Paragraph Text

In place of the <paratext/> element, text of the source paragraph will be quoted.

<paratext/>		
Attribute	Value	Description
<i>precedingpstyle</i>	Paragraph style [name or full path in form of Group Name:Style Name]	Text flow where source marker is will be searched and the first preceeding paragraph using selected paragraph style will be quoted instead of the source.
<i>followingpstyle</i>	Paragraph style [name or full path in form of Group Name:Style Name]	Text flow where source marker is will be searched and the first following paragraph using selected paragraph style will be quoted instead of the source.
<i>filterbycstyle</i>	Character style [name]	Quote from source paragraph will be limited to text formatted using specified character style.
<i>includesoftcr</i>	to include forced line breaks if present in source paragraph - ["true"] default - ["false"]	Forced line breaks from the source paragraph will also be applied in the cross-reference. They are omitted by default.
<i>includetab</i>	to include tabs if present in source paragraph - ["true"] default - ["false"]	Tabs from the source paragraph will also be used in the cross-reference. Tabs are omitted by default.
<i>retainfontfamily</i>	["true"] default - ["false"]	Font family of the source text will be used in reference.
<i>retainfontstyle</i>	["true"] default - ["false"]	Font style of the source text will be used in reference.
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format</i> ¹	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2; ...]	If this attribute is present, element will only display values in text with the listed language set.

Character Override

In place of the <chapnum/> element, chapter number where the source is will be rendered in the reference.

<chapnum/>

Attribute	Value	Description
<i>cstyle</i>	character style [name or full path in form of Group Name:Style Name]	Value of this attribute determines character style of the text created by this element.
<i>format</i> ¹	character format overrides [key1: value1; key2: value2; ...]	If present, this attribute determines character format overrides of the text created by this element.
<i>lang</i>	Character language [language 1; language 2; ...]	If this attribute is present, element will only display values in text with the listed language set.

¹ Format attribute

Format attribute controls character overrides for element or span where used.

format attribute

Key	Value	Description
<i>font-family:</i>	font family [name]	Font family which overrides current element text.
<i>font-style:</i>	font style [name]	Font style which overrides current element text. Example: <i>font-style: Bold</i> - element containing this attribute will always display the text in bold if this style is available.
<i>font-size:</i>	[* pt]	Font size of element will be overridden to chosen value.
<i>position</i>	[normal; sub; sup]	Character position of element will be overridden to normal, subscript or superscript.
<i>case</i>	[normal; smallcaps; allcaps]	Character case of element will be overridden to normal, smallcaps or allcaps.
<i>color</i>	swatch [name]	Character color of element will be overridden to chosen swatch.
<i>nobreak</i>	[yes; no]	No break settings will be overridden in text of this element.
<i>underline</i>	[yes; no]	Underline setting will be overridden in text of this element.
<i>strike</i>	[yes; no]	Strikethrough settings will be overridden in text of this element.

XML elements

- Character override
- Format attribute

External References



- Creating external reference
- Updating external references
- Re-linking external references

TIP: Alt+Click on the Re-link button re-links to the current document.

Creating external references

Creating references to another document is very similar to creating references within a document. The only difference is that before clicking **Insert Cross-Reference** you need to open the document you will refer to. Then before choosing the source paragraph or marker, you choose the source document in the first drop down list in the **Insert Cross-Reference dialog**. You will be able to choose from all currently open documents.

Source document needs to be saved at least once before creating the reference.

Updating external references

When live updates are enabled cross-references across all open documents update in real time. Live Updates don't update cross-references with external source markers in closed documents - to update cross-references in closed documents, use [For more on Manual Updates see opposite page](#). Manual update of the external reference opens the document on background and updates all references which lead from current document to the source one. **Update all Cross-References** command initiates update for all references, internal and external.

Re-linking references

When you want to change the target document of a reference select it in the panel and click  button. You will be offered to automatically re-link remaining cross-references linked to this document, if there will be such documents. Remember that re-linking to a document different from the one previously linked will result in unresolved cross-references, unless the new document contains markers of the same name as the ones used. **Alt+Click** on the  button will re-link selected cross-references to the current document.

- Live updates
- Manual updates
- Unresolved references
- Invalid reference
- Re-linking references
- Converting references to text

Live updates

References to the same document and external references with currently open source documents are by default updated live. The initial update request can come from two sources - from the cross-reference itself, or from its source marker. When line of text with cross-reference or source marker is affected by text composition (e.g., line is moved, attributes are applied, etc.), cross-reference update is scheduled. When a document which contains many references is dramatically modified (eg. frequent shuffling of pages), updating can be turned off to save computing capacities by: **Cross-References panel menu**¹ → **Disable Live Updates** Live updates can be enabled again on the same place. Live Updates don't update cross-references with external source markers in closed documents - to update cross-references in closed documents, use manual update.

Manual Updates

When live updates are disabled, you can still update one or more selected references manually by pushing the  button or **Cross-References panel menu** → **Update Cross-Reference(s)**. When live updates are off and you want to update all references just once, choose **Cross-References panel menu** → **Update All Cross-References**. This feature is also useful when you want to make sure all references are up to date before the final output.

Unresolved reference

When your reference has a red tinted background **like this text** and this icon  next to its name in the panel list, it means that it can't retrieve the data from its source marker. Hovering over the icon in panel will display a tooltip with the cause of the problem.

This can be caused by missing source marker in the current document (the marker was deleted or renamed with Keep Linked Cross-References feature off). If the reference was an external one, it is either caused by a missing document, or a document which can't be opened (e.g., locked by another user). If the document was moved to another known location or renamed to a known name, you can use select the reference in the panel and click the  button to re-link to a correct location. If there are other references leading to the same document, you will be offered to re-link them all automatically.

Invalid reference

When your reference has a magenta tinted background **like this text** and this icon  next to its name in the panel list, it indicates that there is a problem with the reference composition. Hovering over the icon in panel will display a tooltip with the cause of the problem.

Re-linking references

When you want to change the target document of a reference, select it in the panel and click the  button. You will be asked to automatically re-link remaining cross-references linked to this document, if such documents exist. Remember that re-linking to a document different from the one previously linked will result in unresolved cross-references, unless the new document contains markers of the same name as the ones used. **Alt+Click** on the  button will re-link selected cross-references to the current document.

Converting references to text

If your document layout is finished and you want to make sure it will stay the way it is right now, you can freeze the state of cross-references by converting them to normal text. This will also prevent them from displaying incorrect information due to page imposition. **Cross-References panel menu**¹ → **Convert all Cross-References to Text** If you only want some references to stay as they are right now, you can select them in the panel and choose **Cross-References panel menu**¹ → **Convert Cross-Reference to Text** **ONCE CONVERTED TO TEXT REFERENCES WILL NO LONGER UPDATE AND CAN NOT BE CONVERTED BACK**

TIP: Alt+Click on the Re-link button re-links to the current document.

¹ or **Type** → **Cross-References**

X-references Maintenance

- Delete all source markers
- Free Reader plug-in

Delete all source markers

After you've converted all your references to text, you can get rid of the markers. If you do it the other way round you will see a lot of unresolved references. Do not panic though, the references remain in their last known state, so they can still be converted to text.

Cross-References panel menu → *Delete all Source Markers* will purge your documents from all source markers

Free Reader

A free reader ensures compatibility of documents with cross-references and source markers. It will also take care of updating the references on the computers of your co-workers and service providers.. Automatic updating in reader can be disabled. Reader also has the **Update all Cross-References**, **Delete all Source Markers** and **Convert all Cross-References to Text** feature. After the trial version expires, the plug-in behaves the same way as reader.

TIP: When your collaborators install a free reader, you don't have to convert cross references to text everytime when sharing the document.

Composition Errors

	General composition error	this can be caused by internal InDesign error - this is very rare. problem
	Can't find specified paragraph style	Preceding or following style set in element does not exist.
	Can't find specified character style	Character style in specified element settings (either for element format, or for narrowing paragraph text quote) does not exist.
	Can't find preceding paragraph with specified style	Your definition refers to specifically formatted paragraph preceding the source. No such paragraph was found in the story.
	Can't find following paragraph with specified style	Your definition refers to specifically formatted paragraph following the source. No such paragraph was found in the story.
	Source is in overset	Source paragraph does not fit into its frame - its position is not in the document as it will appear in output.
	Source is on pasteboard	Your page number reference can't render any result.
	Missing number sign # in page number definition	page # attribute of Page Number element has no placeholder character for the actual number
	Source is not in footnote	Format uses Footnote number element, but the source text is not in footnote.
	Source is not in numbered paragraph	Format uses Paragraph number element, but the source paragraph does not use numbering .
	Can't find any text with specified character style	Your Paragraph text quote is limited to text using character style, which is not used in source paragraph.
	Composition failed	error in the definition - format definition dialogs preflight your code the problem is in scripting or in CS3->CS2 migration of unsupported element chapnum

Source Errors

	Cross-Reference can't be updated, the story is locked.	unlock the story to proceed with the update
	Can't find source document	re-link to the correct location or move the source document back to its original location
	Can't open source document ...	somebody else is probably editing the source document
	Source marker '...' doesn't exist in this document.	source marker was deleted or renamed breaking the connection
	Source marker '...' doesn't exist in document '....	did you re-link to correct document?
	Can't update cross-reference, source document '...' is not open.	Either open the document, or use manual update which opens the source on the background.

X-references Maintenance

- Composition errors
- Source errors

TIP: Hovering over the error icon will display the error in a tool-tip

Purchasing

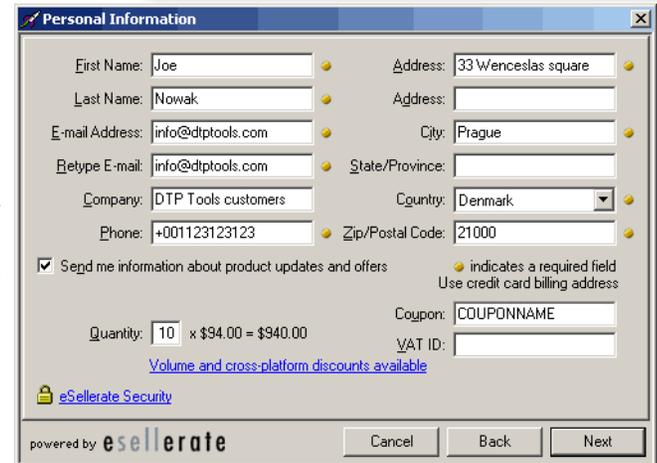
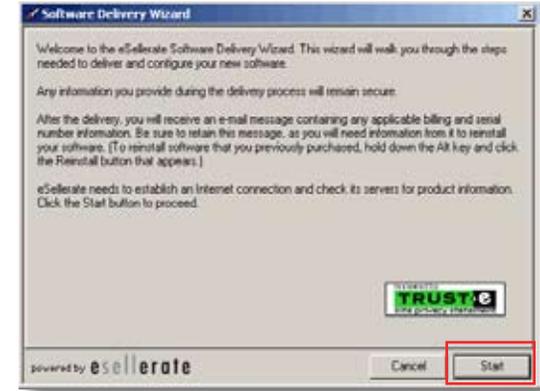
- Buying in the application

Purchasing

After installation, Cross-References plug-in will be in the try-out mode. To get all the benefits of the fully functional software, you need to purchase it. To carry out the purchase, choose **DTP Tools** → **Buy Cross-References now...** or click the purchase link in the intro screen. Your computer needs to be connected to internet to make a purchase. The eSellerate Software Delivery Wizard will guide you through the purchase. Choose Start in the Software Delivery Wizard dialog.

The next dialog contains the License Agreement. Please read it carefully. You can also save the text of License Agreement for future reviewing. To proceed with your purchase, you must agree with the conditions of Agreement. After indicating so, click on the Next button. For the address field use the billing address for the credit card used for the transaction. For the email address you enter, you will receive Order confirmation e-mail, containing all information regarding the transaction and product's serial number. If you do not wish to receive information about product updates and offers, make sure this item is not checked.

If the billing address you selected at the Personal Information screen was for a country in the European Union, you will have the option to enter a Value Added Tax (VAT) ID number. The VAT ID applies only to qualified business customers from the European Union. All other customers should leave this field blank. If VAT applies to your purchase, you will find the specific amount after proceeding. After you specify the quantity of licenses you want to buy, you will see a total price with volume discounts included. To find out more about current volume and cross-platform discount policy for Cross-References, follow the link [Volume and cross-platform discounts available](#). If there are any Coupons applicable, you will have the option to enter a Coupon ID to obtain the discount.



Buying more licenses	If you need to use this plug-in on more than one computer, you can buy more licenses within the application. The plug-in, which you used for purchase, will activate automatically. To activate remaining copies see "Activation" on page 30 .
Volume discounts	A volume discount is a price reduction applicable if you purchased more licenses of the product. If purchasing amounts exceeding those specified in the discounts table, please contact sales@dtptools.com
Cross-platform discount	Cross-platform discounts is an expansion of usual volume discount. It enables you to use a total number of licenses purchased for Windows® and Macintosh® edition of the plug-in to calculate the discount. Simply choose one of the platforms and use the serial number for activation of all installations regardless of the platform.
Online store	Cross-References plug-in is also available for sale in DTP Tools online store. For online purchase visit www.dtptools.com If you prefer other ways of purchasing, please contact us at sales@dtptools.com .

1 DTP Tools menu is located in **Help** menu on Windows and **InDesign** menu on Mac

To proceed with the transaction, fill in your credit card information. If the billing address you selected at the Personal Information screen was for a country other than the United States, you will have the option to select a local currency (if that currency is supported). This option is supported for Visa and MasterCard only.

If the billing address you selected at the Personal Information screen was in the European Union country, the purchase will be subject to a Value Added Tax (VAT). Unless you entered a valid VAT ID as a qualified business customer, the order total will include VAT.

Your order will be processed after confirming the information. If everything is correct, click on the submit button in the following dialog.

For more information about security follow the link eSellerate security.

You can save or print confirmation page, which contains all information you might need for future reinstallations, upgrading or "switching" of Cross-References.

After purchase will the **Buy Cross-References now...** item disappear from the **DTP Tools** menu.



Purchasing

- Buying in the application (continued)

Reinstallation

When you reinstall a copy of Cross-References that was already purchased and subsequently uninstalled, you need to reactivate it. Your computer needs to be connected the Internet during reinstallation. This option is not available for CS3 Macintosh version. It can be fully replaced by "Activation Transfer" (more on page 31)

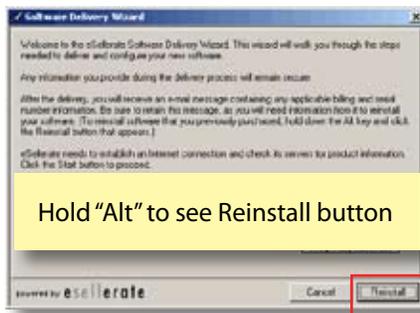
Choose **DTP Tools**¹ → **Buy Cross-References now...** Hold **Alt** key in the first dialog of Software delivery wizard. The **Reinstall** button will appear in place of Start button.

To verify that your order was previously processed, please enter your Order number (you will find it on Receipt or in Order Confirmation e-mail you received after buying Cross-References). Your order number will start with letters ST (for example, ST123456).

There is a limit of three reinstallations per license. Once you reach this limit, you need to contact support@dtptools.com before reinstalling again.

Reinstallation

- Reinstallation



¹ DTP Tools menu is located in **Help** menu on Windows and **InDesign** menu on Mac

Activation

- Standard Activation

Standard Activation procedure

Cross-References are activated automatically when the purchase is done within application. However, when you purchase from the web-store or from a reseller, you need to activate it. When you buy more than one license from within the application, only the plug-in on the computer you've used for purchasing will be activated. Remaining copies need to be activated too.

To do so choose **DTP Tools¹** → **Activate**. You will be prompted for your serial number - it is in your order confirmation e-mail.

Your computer has to be connected to the Internet during activation. If this is not possible, please follow the [Manual Activation](#) procedure described below.

Activation message	Countermeasure
Entered serial number has incorrect length. Please check whether you typed or copied the whole serial number.	If you were copy/pasting the number, there is most likely an extra space after the last character, or the last four numbers missing.
Entered serial number is not valid. Please check whether you typed or copied it correctly.	DT-110-XXX-XXXX-XXXX-XXXX-XXXX-XXXX - this is a correct form of the serial number. The serial number is in your order confirmation e-mail.
To finish DTP Tools plug-in installation, please restart InDesign/In-Copy with Administrator privileges.	Privileges of your user account are not sufficient to save the activation data. Please log-in as an administrator and start the application again.
eSellerate Engine is not installed or has been damaged. Please uninstall and reinstall your DTP Tools product.	Download the latest installer from www.dtptools.com/cross-references and run it on your computer.
That serial number is unrecognized. Please check the number and try again.	If you have purchased your license in the web-store, please wait 20 minutes before you start the activation. If the problem persists, it might be caused by proxy settings and can be solved by Manual Activation
Serial number is blacklisted.	Please contact support@dtptools.com .
Our records indicate that this product was returned by the purchaser, and its serial number retired. If you believe our records are in error, please contact us.	Please contact us with your order details, we'll double check our records.
Our records indicate that this product has already been activated the maximum number of allowed times.	Please contact support@dtptools.com to get additional activation.
No product on this computer is activated by this serial number.	Download and install the try-out version of the plug-in and try again.
Serial number is already associated with another order.	Please contact us with your order details, we'll give you a new S/N.
The activation server has deemed to deny the action requested.	Please try again in a minute or two.
Activation was not successful. Please check your internet connection and try again. If you receive this message again, please check the 'Manual Activation' box to activate this product via a Web interface.	If you are connected to the internet and still get this message, it is caused by the proxy settings. Manual Activation is a safe work-around for this problem.
Activation completed successfully. Thank you for choosing DTP Tools!	Hurray! This message means your plug-in is now a full version.

TIP: If you've purchased your license through the Web store, it may take up to 20 minutes for the store to notify all activation servers and authorize your serial number. Therefore, if you receive an 'unknown serial number' message, please wait several minutes and try again.

¹ DTP Tools menu is located in **Help** menu on Windows and **InDesign** menu on Mac

Manual Activation

Choose activate, and check **Manual Activation** checkbox in the **Activation** dialog. Fill in the serial number and hit **Activate**. You will be offered to either **Activate using a web browser on this computer**, or to **Activate using different computer that has web access**, or to enter an **Activation Key** (provided you already got one).

Activate using a web browser on this computer - You will be brought to a web page with pre-filled installation ID. You only need to click **Submit** button to get the **Activation Key**. Copy the key and return to the **Activation Dialog** and click next until you'll see the field to fill the key into.

Activate using different computer that has web access - You will obtain your installation ID and a link to the activation website <http://store.esellerate.net/store/support/ManualActivation.aspx>. After entering the **Installation ID** you will obtain **Activation Key** - save it or print it and fill it back in the dialog when prompted. If you have closed the dialog on the first computer meanwhile, start activation again with **Manual Activation** checked and choose **I already have an Activation Key and would like to activate now**. You will be prompted for the Activation Key again.

Activation Transfer

If you plan to reinstall your InDesign or entire operating system, or you simply want to utilize your Cross-Reference license on a different computer, you should de-activate it first to make sure you'll stay within your license's activation limit.

MAC: **InDesign** → **DTP Tools** → **Transfer Activation...**

WIN: **Help** → **DTP Tools** → **Transfer Activation...**

Transfer DTP Tools Activation dialog will prompt you for a serial number of the installed plug-in. If you have more serial numbers, you can easily find out which is used by checking the list of used serial numbers. The last part is replaced by XXXX to prevent unauthorized manipulation. Serial number in full form is in your order confirmation e-mail. If you can not find it, contact support@dtptools.com preferably using the same e-mail address as for ordering.

Activation

- Manual Activation
- Activation Transfer

TIP: Problems with activation caused by Macintosh Proxy settings can be avoided by using manual activation.

Last words

- Feedback
- Special Thanks

Feedback

Our ambition is to make Cross-References the best referencing solution ever. If you'll think of some missing feature, or if you encounter a problem while using it, please let us know on feedback@dtptools.com or by any other means of contact.

Special Thanks

Our special thanks for helping us to improve this product belong to Peter Gold of KnowHow Pro Services, whose comments, observations and ideas were a great resource. Peter Gold is an Adobe Certified Expert (ACE) in InDesign, FrameMaker, and Acrobat, and is active in their beta-testing programs. Peter, a longtime FrameMaker and Acrobat trainer, specializes in working with technical writers. He is currently working on a book he's creating with FrameMaker and InDesign; it's about creating long documents with InDesign, for FrameMaker authors and technical writers.

Email: contact: peter@knowhowpro.com.

Thank you, Peter!

You might have noticed, that all the true InDesign wisdom references lead to the same book - Real World InDesign CS2 by David Blatner and Olav Martin Kvern. If you want to learn InDesign from the same book we did, visit <http://indesignsecrets.com/books-and-videos/>

Thank you, David!

Scott Citron is an award-winning graphic designer and principal of Scott Citron Design in New York City, specializing in fine book design and corporate identity development. Scott is an Adobe Certified Instructor in InDesign, InCopy, Illustrator, and Photoshop CS2. Yet Scott finds time to proof read product guides for plug-in developer who are not native English speakers. Thank you, Scott! - <http://scottcitrondesign.com/>

Mark Niemann-Ross is the Developer Evangelist for Adobe InDesign, who has done so much to make our plug-ins a success. Thank you, Mark!

Activation

Product Activation is our anti-piracy technology designed specifically to verify that your software has been legitimately licensed. Activation turns the try-out product into a fully functional version.

Attribute

Attribute determines the behaviour and appearance of objects created by format elements. In `<filename fullpath="true"/>`, `fullpath` is an attribute.

Context Menu

"Context menus are menus that pop up at the location of the cursor, and change according to the location of the cursor and the object you have selected. On the Macintosh, you summon a context menu by holding down Control as you click the mouse button. In Windows, click the right mouse button." (*Blatner, Kvern: Real World Adobe InDesign CS2, p.55*) Some Cross-References features are accessible via the context menu while typing.

Chapter Number

In InDesign CS3 you can divide your document into chapters in *Layout* → *Numbering & Section options*

Character Style

Character style is a set of text formatting attributes you can apply to a piece of text smaller than an entire paragraph. Character styles can also be used to mark text you want to appear in a reference quotation. If you never used this InDesign feature, it is worth it starting right now - *Real World Adobe InDesign CS2 p.300*

Cross-Reference

A cross-reference is an instance within a document of referring to information elsewhere (either within the same work or in a separate work) (*source: Wikipedia*)

DTP Tools menu

This menu contains tools for purchasing the plug-ins, activations, updates and support. On Mac it is located in *InDesign* menu, on Windows in *Help* menu

Element

Active part of the cross-reference format definition. Specified reference will appear in place of element in the composed cross-reference. Element appearance is set by attributes. `<paranum/>` is an element.

Key

Part of the element attribute.

In `<paratext format="font-family:Helvetica"/>` the `font-family` is a key of `format` attribute.

Page Number

Relative number of the page in the document as set in *Layout* → *Numbering & Section options*
more in Real World Adobe InDesign CS2 p.128

Paragraph Number

Paragraph number quoted by using the element `<paranum/>` can be set in the *Paragraph Panel Menu* → *Bullets and Numbering* → *List Type* → *Numbers* or for entire style in the *Paragraph Style Options* → *Bullets and Numbering* → *List Type* → *Numbers and Type* → *Bulleted and Numbered Lists* → *Define Lists*

Paragraph Style

"Paragraph styles encapsulate all text formatting—both paragraph formatting and character formatting..."
Real World Adobe InDesign CS2 p.306

Scripting

"Scripting is what computing is supposed to be *about*: having your computer take over boring, repetitive tasks so that you can spend more time playing *World of Warcraft*. Er, we mean, concentrate on your creative work." – *so says about scripting Real World Adobe InDesign CS2 Chapter 12 p.729*. From Cross-References point of view we can only add, that the plug-in is fully scriptable. See [Appendix 2](#) for scripting guide and many script samples.

Section

"Sections are ranges of pages that have unique properties – for instance, the often have different page numbering style" – *Real World Adobe InDesign CS2 p.126*

Source Marker

Source Marker is a special character which provides a unique identification of a piece of text.

Value

Setting of the element attribute or attribute key.

In `<paratext format="font-family: Helvetica" includetab="true"/>` the `Helvetica` is a value of `font-family` key and the `"true"` word is a value of the `includetab` attribute.

XML

XML stands for "Extensible Markup Language. Cross-References format definitions can either be set using dialog with buttons and edit fields, or typed in as XML. more in XML in InDesign- *Real World Adobe InDesign CS2 Chapter 14 p.789*

Keywords

- Activation
- Attribute
- Context menu
- Chapter number
- Character Style
- Cross-reference
- DTP Tools menu
- Element
- Key
- Page Number
- Paragraph Number
- Paragraph Style
- Scripting
- Section
- Source Marker
- Value
- XML

Appendix 1

• DTD

```

<!ELEMENT chapnum EMPTY>
<!ATTLIST chapnum
  cstyle          CDATA          #IMPLIED
  format          CDATA          #IMPLIED
  lang            CDATA          #IMPLIED
>
<!ELEMENT filename EMPTY>
<!ATTLIST filename
  cstyle          CDATA          #IMPLIED
  format          CDATA          #IMPLIED
  lang            CDATA          #IMPLIED
  fullpath        (yes | no | true | false) "no"
  extension       (yes | no | true | false) "yes"
>
<!ELEMENT fnnum EMPTY>
<!ATTLIST fnnum
  cstyle          CDATA          #IMPLIED
  format          CDATA          #IMPLIED
  lang            CDATA          #IMPLIED
  from            (reftext | footnote) "footnote"
>
<!ELEMENT pagenum EMPTY>
<!ATTLIST pagenum
  cstyle          CDATA          #IMPLIED
  format          CDATA          #IMPLIED
  lang            CDATA          #IMPLIED
  precedingpstyle CDATA          #IMPLIED
  followingpstyle CDATA          #IMPLIED
  usesectionname (yes | no | true | false) "no"
  forcearabic    (yes | no | true | false) "no"
  numbertype     (default | actual | ordinal) "default"
  usepage        (yes | no | true | false) "no"
  pagetext       CDATA          "page #"
  usethis        (yes | no | true | false) "no"
  thistext       CDATA          "this page"
  useprev        (yes | no | true | false) "no"
  prevtext       CDATA          "previous page"
  usenext        (yes | no | true | false) "no"
  nexttext       CDATA          "next page"
  useopposite    (yes | no | true | false) "no"
  oppositetext   CDATA          "opposite page"
>
<!ELEMENT paranum EMPTY>
<!ATTLIST paranum
  cstyle          CDATA          #IMPLIED
  format          CDATA          #IMPLIED
  lang            CDATA          #IMPLIED
  precedingpstyle CDATA          #IMPLIED

```

```

    followingpstyle      CDATA      #IMPLIED
    numberonly          (yes | no | true | false) "no"
>
<!ELEMENT paratext EMPTY>
<!ATTLIST paratext
  cstyle      CDATA      #IMPLIED
  format      CDATA      #IMPLIED
  lang        CDATA      #IMPLIED
  precedingpstyle CDATA      #IMPLIED
  followingpstyle CDATA      #IMPLIED
  filterbycstyle CDATA      #IMPLIED
  includesoftcr CDATA      "no"
  includetab   CDATA      "no"
>
<!ELEMENT span ANY>
<!ATTLIST span
  cstyle      CDATA      #IMPLIED
  format      CDATA      #IMPLIED
  lang        CDATA      #IMPLIED
>

```

Appendix 1

- DTD (continued)

Appendix 2

• JavaScript Scripting

To avoid conflict with present CrossReference objects in CS2/CS3, all objects provided by Cross-References plug-in are prefixed with “dt” (dt cross references, dt source markers, etc.).

dtCrossReferencePreference Object

Object representing Cross-References plug-in preferences.

Parent: application, document

Property	Type	Access	Description
liveUpdates	Boolean	r/w	If true, live updates are enabled.

Following example disables live updates in active document:

```
app.activeDocument.dtCrossReferencePreferences.liveUpdates = false;
```

dtCrossReferenceFormat Object

Object representing cross-reference format.

Parent: application, document

Property	Type	Access	Description
formatName	String	r/w	Unique name.
formatDefinition	String	r/w	Format definition.

Method	Returns	Description
remove	Nothing	Delete format.

Following example deletes cross-reference format “My format”:

```
var myFormat = app.activeDocument.dtCrossReferenceFormats.item("My format");  
myFormat.remove();
```

dtCrossReferenceFormats Object

Object representing collection of cross-reference formats.

Parent: application, document

Property	Type	Access	Description
item	Object	read	Returns cross reference format with the specified index or name.
length	Long	read	The number of cross reference formats in the collection.

Method	Returns	Description
add	dtCrossReferenceFormat	Create a new cross reference format.

Following example adds new cross-reference format:

```
app.activeDocument.dtCrossReferenceFormats.add({formatName: "My format", formatDefinition: "My definition"});
```

Following example modifies definition of cross-reference format “My format”:

```
var myFormat = app.activeDocument.dtCrossReferenceFormats.item("My format");  
myFormat.formatDefinition = "New definition";
```

TIP: “Be Not Afraid - you do not need to know how to *write* scripts to be able to *run* scripts.” *Real World Adobe InDesign CS2* p.730
Sample scripts can be downloaded from www.dtpools.com/cross-references

dtSourceMarker Object

Object representing source marker for cross-reference.

Parent: document, story, insertion point

Property	Type	Access	Description
name	String	r/w	Unique name. Rename retains links to local cross-references.
index	Long	read	Index of the object within its parent object (story).
parent	Object	read	The parent of the object (story).
location	Text	read	The text where this source marker is located.

Method	Returns	Description
remove	Nothing	Delete source marker.

Following example deletes "My Source Marker":

```
var mySourceMarker = app.activeDocument.dtSourceMarkers.item("My Source Marker");
mySourceMarker.remove();
```

dtSourceMarkers Object

Object representing collection of source markers.

Parent: document, story, insertion point

Property	Type	Access	Description
item	Object	read	Returns source marker with the specified index or name.
length	Long	read	The number of cross reference formats in the collection.

Method	Returns	Description
add	dtSourceMarker	Create a new source marker. Required parameter is InsertionPoint object.

Following example adds new source marker "My source marker" at the beginning of the story:

```
var myInsertionPoint = app.activeDocument.stories[0].insertionPoints[0];
var mySourceMarker = app.activeDocument.dtSourceMarkers.add(myInsertionPoint);
mySourceMarker.name = "My source marker";
```

Appendix 2

- Java Script Scripting

dtCrossReference Object

Object representing cross-reference.

Parent: document, story, insertion point

Property	Type	Access	Description
contents	String	read	Composed text.
index	Long	read	Index of the object within its parent object (story).
parent	Object	read	The parent of the object (story).
location	Text	read	The text where this cross-reference is located, including both anchors.
sourceMarkerName	String	r/w	Source marker name.
sourceMarkerFile	String	r/w	Source marker file path.
formatName	String	r/w	Format name.
formatDefinition	String	r/w	Custom format definition.

Method	Returns	Description
convertToText	String	Convert cross-reference to text.
update	Nothing	Update cross-reference.
remove	Nothing	Delete cross-reference.

Following example updates the first cross-reference:

```
var myCrossReference = app.activeDocument.dtCrossReferences.item[0];  
myCrossReference.update();
```

Following example deletes the first cross-reference:

```
var myCrossReference = app.activeDocument.dtCrossReferences.item[0];  
myCrossReference.remove();
```

dtCrossReferences Object

Object representing collection of cross-references.

Parent: document, story, insertion point

Property	Type	Access	Description
item	Object	read	Returns cross-reference with the specified index.
length	Long	read	The number of cross reference formats in the collection.

Method	Returns	Description
add	dtCrossReference	Create a new cross-reference. Required parameter is InsertionPoint object.

Following example adds new source marker “My source marker” at the beginning of the first paragraph and new cross-reference to the second paragraph:

```
var myStory = mySourceMarkerInsertionPoint = app.activeDocument.stories[0];
var mySourceMarkerInsertionPoint = myStory.paragraphs[0].insertionPoints[0];
var mySourceMarker = app.activeDocument.dtSourceMarkers.add(mySourceMarkerInsertionPoint);
mySourceMarker.name = "My source marker";
var myCrossReferenceInsertionPoint = myStory.paragraphs[1].insertionPoints[0];
var myCrossReference = app.activeDocument.dtCrossReferences.add(myCrossReferenceInsertionPoint);
myCrossReference.sourceMarkerName = mySourceMarker.name;
myCrossReference.formatDefinition = "See <paratext/> in the previous paragraph.";
```

Appendix 2

• AppleScript Scripting

To avoid conflict with present CrossReference objects in CS2/CS3, all objects provided by Cross-References plug-in are prefixed with “dt” (dt cross references, dt source markers, etc.).

dt cross reference preference object

Object representing Cross-References plug-in preferences.

Parent: application, document

Property	Type	Access	Description
live updates	Boolean	r/w	If true, live updates are enabled.

dt cross reference format object

Object representing cross-reference format.

Parent: application, document

Property	Type	Access	Description
format name	String	r/w	Unique name.
format definition	String	r/w	Format definition.

Method	Returns	Description
delete	Nothing	Delete format.

dt source marker object

Object representing source marker for cross-reference.

Parent: document, story, insertion point

Property	Type	Access	Description
name	String	r/w	Unique name. Rename retains links to local cross-references.
index	Long	read	Index of the object within its parent object (story).
parent	Object	read	The parent of the object (story).
location	Text	read	The text where this source marker is located.

Method	Returns	Description
delete	Nothing	Delete source marker.

dt cross reference object

Object representing cross-reference.

Parent: document, story, insertion point

Property	Type	Access	Description
contents	String	read	Composed text.
index	Long	read	Index of the object within its parent object (story).
parent	Object	read	The parent of the object (story).
location	Text	read	The text where this cross-reference is located, including both anchors.
source marker name	String	r/w	Source marker name.
source marker file	String	r/w	Source marker file path.
format name	String	r/w	Format name.
format definition	String	r/w	Custom format definition.

Method	Returns	Description
convert to text	String	Convert cross-reference to text.
update	Nothing	Update cross-reference.
delete	Nothing	Delete cross-reference.

Appendix 3

• VB Script Scripting

To avoid conflict with present CrossReference objects in CS2/CS3, all objects provided by Cross-References plug-in are prefixed with “dt” (dt cross references, dt source markers, etc.).

dtCrossReferencePreference Object

Object representing Cross-References plug-in preferences.

Parent: application, document

Property	Type	Access	Description
LiveUpdates	Boolean	r/w	If true, live updates are enabled.

dtCrossReferenceFormat Object

Object representing cross-reference format.

Parent: application, document

Property	Type	Access	Description
FormatName	String	r/w	Unique name.
FormatDefinition	String	r/w	Format definition.

Method	Returns	Description
Remove	Nothing	Delete format.

dtCrossReferenceFormats Object

Object representing collection of cross-reference formats.

Parent: application, document

Property	Type	Access	Description
Item	Object	read	Returns cross reference format with the specified index or name.
Length	Long	read	The number of cross reference formats in the collection.

Method	Returns	Description
Add	dtCrossReferenceFormat	Create a new cross reference format.

dtSourceMarker Object

Object representing source marker for cross-reference.

Parent: document, story, insertion point

Property	Type	Access	Description
Name	String	r/w	Unique name. Rename retains links to local cross-references.
Index	Long	read	Index of the object within its parent object (story).
Parent	Object	read	The parent of the object (story).
Location	Text	read	The text where this source marker is located.

Method	Returns	Description
Remove	Nothing	Delete source marker.

dtSourceMarkers Object

Object representing collection of source markers.

Parent: document, story, insertion point

Property	Type	Access	Description
Item	Object	read	Returns source marker with the specified index or name.
Length	Long	read	The number of cross reference formats in the collection.

Method	Returns	Description
Add	dtSourceMarker	Create a new source marker. Required parameter is InsertionPoint object.

Appendix 3

- VB Script Scripting

dtCrossReference Object

Object representing cross-reference.

Parent: document, story, insertion point

Property	Type	Access	Description
Contents	String	read	Composed text.
Index	Long	read	Index of the object within its parent object (story).
Parent	Object	read	The parent of the object (story).
Location	Text	read	The text where this cross-reference is located, including both anchors.
SourceMarkerName	String	r/w	Source marker name.
SourceMarkerFile	String	r/w	Source marker file path.
FormatName	String	r/w	Format name.
FormatDefinition	String	r/w	Custom format definition.

Method	Returns	Description
ConvertToText	String	Convert cross-reference to text.
Update	Nothing	Update cross-reference.
Remove	Nothing	Delete cross-reference.

dtCrossReferences Object

Object representing collection of cross-references.

Parent: document, story, insertion point

Property	Type	Access	Description
Item	Object	read	Returns cross-reference with the specified index.
Length	Long	read	The number of cross reference formats in the collection.

Method	Returns	Description
Add	dtCrossReference	Create a new cross-reference. Required parameter is InsertionPoint object.

Appendix 3

- VB Script Scripting

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