

# MACREX GENERAL OPTIONS MENU 1

(Need another help file? Try [Macrex Help Contents](#) Macrex Help Keystrokes <CTRL><ALT>F1 or <CTRL><ALT>F10)

(see also [General Options 2](#))

The options menu (press **O** or **Options->General Options 1** from the Main Menu) gives you the choice to set up some features which will vary for each index and others which you may wish to keep as permanent options for all your indexes. The options can be saved as a group (if desired) so that they become the *defaults* when MACREX is used on another occasion. The default settings when MACREX is first installed are shown below. If you want to load options from MACREX Version 7 use **Option D** Load version 7 option file.

- a. Subjects covered by the Options part of the program include:
- b. Listing the index in entry order on the printer or in a file (options A, B, C)
- c. Setting for the keys used for various MACREX commands and functions (options E, F, G, I, Q, U)
- d. Recognition of roman numerals as page references (option H)
- e. Settings for automatic sorting and merging (options J, K, L)
- f. Settings concerning the appearance of the index on screen (options M, N, O, P, W)
- g. Settings to facilitate making entries from text not in final page form (options R, S)
- h. Settings to help protect the index from power failures and locate it on the disk (options X, Y)
- i. Further option settings are available in [General Options Menu 2](#).

Selecting **Options->General Options 1** from the Main Menu produces a menu like this:

## M A C R E X   O P T I O N S

<u>A</u> - List on printer? No	<u>S</u> - Current page number 1
<u>B</u> - List in a file? Yes	<u>T</u> - Unused Option
<u>C</u> - Name of list file C:\DATA\MX8TEMP\cows. LST	<u>U</u> - Intelligent flip? Yes
<u>D</u> - Load Version 7 options file	<u>V</u> - unused option
<u>E</u> - Capitalize flips? No	<u>W</u> - Type of screen list Wrap around
<u>F</u> - Check on deleted entries? No	<u>X</u> - Change index description
<u>G</u> - Unused option	<u>Y</u> - Minutes between automatic saves 5
<u>H</u> - Recognize roman numbers? Yes	<u>Z</u> - Version 5 page number checking? No
<u>I</u> - Insert on? Yes	<u>1</u> - Number of heading levels (fields) 0
<u>J</u> - Autosort On	<u>2</u> - Keep scroll buffer? Yes
<u>K</u> - Automerge On	<u>3</u> - Cumulative backup? No
<u>L</u> - Track added entries? Yes	<u>4</u> - Printer lines per inch 6
<u>M</u> - Set Colours	<u>5</u> - Printer characters per inch 12
<u>N</u> - Screen width 100	<u>6</u> - Check for bad page ranges? Yes
<u>O</u> - Screen height 39	<u>7</u> - Hypertext markup features
<u>P</u> - Set Code Page 437	<u>8</u> - Version 6 page number checking? No
<u>Q</u> - Beep with messages Yes	<u>9</u> - Macro Options
<u>R</u> - Page number increment 0	<u>0</u> - Macrex Options Menu 2

Press <ESC> to save defaults, ^L or ^S/F8 to load or save named option files  
Select feature(s) to change; press <return> when done ==>

The numbers in brackets refer to the relevant section numbers in the manual. \* - this setting is made automatically by the program when you install it on your machine

Choose the option that you wish to change by pressing the appropriate letter. When you have finished you can save the general options (E, F, G, H, I, N, O, Q, U, W, X, Y, Z, 1, 2, 3, 4, 5, 6, 8) so that they become permanent by pressing <ESCAPE>. They will be saved in a file called DEFAULT8. OP8. You will be asked whether you want to save this in the default folder (in which case your choices will be operative for all indexes or in the current index folder (in which case they will be operative for indexes in that folder only). Options A, B, C, J, K, L, R and S (the index-specific options) do not have to be saved because they are automatically stored in the .INF file of the current index. They will remain the defaults for the current index but will not affect the settings chosen for other indexes.

### A - List on printer

You may wish to have a list of your entries in the order they were typed on paper. Pressing A makes this possible. You will be asked if you want a list produced on the printer. Choose **Y** or **N** for **Yes** or **No**. If **Yes** has been selected then the following things will happen:

1. Each time a new entry is typed in it will be echoed on the printer preceded by its number. The printer used will be the windows default printer. If you want to change this use the *Printers* option on the Windows *Control Panel*. Note that on a laser printer the page will only be ejected when it is full.
2. Each time an entry is edited it will be echoed on the printer preceded by its number and the word EDIT.
3. Each time a keyword is defined it will be echoed on the printer followed by the word KEYWORD and then the full (expanded) form of the keyword.
4. Each time an entry is deleted it will be echoed on the printer preceded by the word DELETED.

### **B - List in a file**

Select by pressing B. You will be asked if you want the entries echoed in a disk file. If you reply **Y** for **yes** then a file will be created with the name currently defined in option **C** below. All entries which are subsequently entered, deleted or edited will be echoed on the list file in the same way as that described for the printer listing above.

If a list file with the same name already exists from a previous session in MACREX then the new entries are appended to the existing file.

Apart from the straightforward list of entries the time and date will be entered in the list file each time MACREX is started and stopped. This allows you to get a permanent record of the exact times spent working on a particular index.

If you are making the list file on a removeable disk you must be careful not to change the disk, otherwise you may get an error message (see Section 31 - [insert link](#) - for instructions on what to do next).

### **C - Name of list file**

This option allows you to change the drive and name of the list file. The default is the current index name and drive with the extension .LST added. If a list file was already in use when you changed the name it will be closed with a note of the time and date in it, and a new file with the requested name will be opened. If you change the name to that of an existing file, the existing file will be overwritten and the contents lost.

### **D - Load Version 7 options file**

Allows you to load an options file using the general options (including the colour scheme) from a MACREX Version 7 options file. Note that on Version 8 the colour scheme is saved separately in a file called default.t8.col from the [MACREX Colour Setting Menu Colours](#) menu. If you load a Version 7 file in order to get the colour scheme, you must save the colours from the [MACREX Colour Setting Menu](#) menu before exiting MACREX if you want to keep them as the defaults.

### **E - Capitalize flips**

This is used only if all first letters are to be capitalized. If **E** is set to **Yes** and the first letter of an entry is a capital letter, when a [flip](#) is performed then the flipped entry will be given a capital letter for its main heading and lower case for the subheading. If **No** then the main heading and subheading are flipped without change. N.B. This option should be watched carefully to avoid aberrations like Bananas, uganda.

### **U - Intelligent flip?**

This option is normally set to **Yes** so that

1. any word which is in the list of ignored words (set from the sort options menu) and occurs at the beginning of a subheading will be kept in the subheading when flipped.

For example

cows, and cheese, 66

would be flipped to

and cheese, cows, 66

with intelligent flip off, but to

cheese, and cows, 66

with intelligent flip on. Note that the list of words accounted for by the intelligent flip is defined in MACREX sort options, K - Edit list of ignored words - [insert link](#).

2. *see also* references are flipped so that, for instance

cows, ^see al so^ ani mal s

is flipped to

ani mal s, ^see al so^ cows

rather than

^see al so^ ani mal s, cows

## **F - Check on deleted entries**

This option controls the response to pressing <CTRL>Y (the delete entry command) while editing. If **Yes** you will be asked to confirm that the entry is to be deleted on the bottom line of the screen. If **No** the entry will be deleted without asking.

## **I - Insert on?**

This is exactly the same as the `insert on/off` function controlled by the <i ns> key. It is displayed here so that you can set the default the way you want.

## **N - Screen width**

## **O - Screen height**

These options allow you to set the width and height (using the number of characters / lines) for the window that MACREX uses. By default MACREX will use a screen width of 100 and a height of five lines less than the maximum that will fit on the screen. If you want to get more lines on the screen you may be able to do this by changing to a smaller font - alternatively the default font may be too small so you may want to change to a larger font. You can [change the font size](#) by using Windows to change the settings for the MACREX shortcuts - but you should do this only when you have exited MACREX or you may generate error messages. You can also change the screen width and height from the [MACREX startup program](#). If you have changed the screen height or width, when you exit from the General Options Menu 1, you will be asked whether you want to save them. If you do not do so the settings will only last during your current editing session. If you choose to save them they will be saved to the `macrex.ini` file in the `macrex` default folder, along with the current code page.

## **P - Set Code Page**

The code page determines the special characters (currency symbols, accented characters, greek letters etc) that can be displayed on the screen. We support code page 437 (usually used in the USA) and 850 (used in many European countries). The main difference is that 850 has more accented characters available while 437 has more Greek characters. Code pages can be changed using this option, but only if a True Type font (usually Lucida Console) is in use. If you are using a raster font you are stuck with the code page that is the default for your computer. You can [change the font](#) when MACREX is shut down by using Windows to change the properties of the MACREX shortcuts.

When you use this option you will see a 16 character square box displaying all of the characters and symbols available on the current code page. To the right of this is a list of the numbers of all the code pages available with the current one highlighted. Use the arrow keys to select the one you want and press <ENTER> to see what characters are available. Press <ESCAPE> or F1 to exit this menu and you will be asked if you want to confirm the change.

For the sort and merge to work as expected you need to have the correct tables (First letter table, character translation tables and capitalisation table) loaded. We provide tables for code pages 437 and 850 which should load automatically. If you want to use any of the other code pages and the sorting or merging does not work correctly, you can edit your own tables from the Sort Options Menu ([insert link](#)) and the [Merge Options Menu, Option 6 - Edit capitalisation table](#).

You can use a much wider range of characters and accents than are available on the screen by coding them with printer and wordprocessor replacement codes. For example š is coded as `s{[v]}`. This is automatically converted to the correct character when you make a wordprocessor file or print the index. For a list of the built in replacement codes [click here](#) ([insert link](#)). For general information on coding characters, see the [Characters](#),

[fonts and accents](#) help file.

If you have changed the code page, when you exit from the General Options Menu 1, you will be asked whether you want to save it. If you do not do so the settings will only last during your current editing session. If you choose to save them they will be saved to the `macrex.ini` file in the macrex default folder, along with the current screen height and width.

### Q - Beep with messages

If you do not wish to have the beep to remind you when you have omitted the page number from an entry or that MACREX has completed one of its tasks, you can set this to **No**.

### H - Recognize roman numbers?

If this is set to **No** the automatic recognition of roman numerals as page references is disabled. Since there is the possibility of confusion between roman numerals used within text (e.g. Henry VI) and roman numerals used as page numbers, as well as between roman numerals and some words (e.g. mix) it is wise to set this option to **No** on all occasions except when roman numerals are used. If you choose to recognize roman numerals it would be advisable to use the blocker ([F7](#)) to separate text from page numbers wherever there might be any confusion.

See also the sort option [P - Sort roman numbers within an entry](#).

### J - Autosort

This option allows you to turn the automatic sorting on and off. The only reason to turn it off is if there is not enough memory (RAM) on your computer to accommodate the index. By default MACREX Version 8 allocates 40 Mb of memory for storing the entries. This should allow 100,000 - 200,000 entries on automatic sorting. Additional memory can be allocated up to the maximum amount your computer can accommodate using the MACREX [command line](#) option, -M. It is very seldom necessary to turn it off on contemporary computer unless the index has literally millions of entries.

When the automatic sort is turned **on**:

1. On the *add entries* screen - insert link - entries are sorted immediately when they scroll off the top of the screen. When you return to the [Main Menu](#) the remaining entries on the screen are also sorted
2. Each time an entry is edited on the [Inspect and Edit](#) screen it is re-sorted to make sure that it is the right place. If an entry is deleted it disappears immediately.
3. When new entries are added on the [add on edit screen](#) they are immediately placed in the correct position. If [tracking](#) is on the screen will follow the added entries. The sorting sequence is as defined on the Sort options menu - insert link. If you want to change the sorting sequence (e.g. word-by-word to letter-by-letter) you must go to the Sort Options Menu, change whatever is necessary, press <ESCAPE> if you want this new setting to be the default, set option **J - Unconditional re-sort** to **Yes** and then select **S - Sort index** from the Sort Subprogram Menu.

When the automatic sort is turned **off**:

1. On the *add entries* screen - insert link - entries are stored in one 10 of alphabetically determined batches when they scroll off the top of the screen. When you return to the [Main Menu](#) the remaining entries on the screen are also stored. Within the batches entries are not sorted.
2. Each time an entry is edited on the [Inspect and Edit](#) screen it is replaced in the same place if it remains with the same batch, and the place previously occupied by the entry is replaced by a message saying "zzz Edited entry filed in different batch". If an entry is deleted it replaced by a message saying "zzz Deleted".
3. When new entries are added on the [add on edit screen](#) they are immediately placed in the appropriate batch.
4. When the index is sorted and merged, entries are fine-sorted within the batch and the messages beginning with "zzz" are removed.

### K - Automerger

When the automerger is on all entries typed in on the input screen, added from the [Inspect and edit screen](#) or edited or added their string of page references processed by the [merge](#), even if automatic sorting is not **on**. [Squashing](#), arranging [roman](#) or [annotated](#) numerals and sorting the page references in order will all be done. In addition multiple *see* or *see also* references will have their references arranged in ascending alphabetical order.

If the automatic sorting is **on** each new entry added is also tested against the adjacent entry to see whether the two entries are the same apart from page numbers. If so they will be merged. If there are too many page numbers

to fit on one occurrence of the entry then the heading will be duplicated and the page numbers will be spread across two or more entries.

If you need to change the [merge options](#) you must do so from the merge subprogram menu - insert link. The automatic merge does not do quite as much as the full merge (accessed from the Merge subprogram).

1. The automatic merge will not merge more than 100 page references. The Merge subprogram can cope with 1000 (this is not to say that we advise long strings of page numbers; the only occasion on which this upper limit might be overrun would be likely to be when several indexes with long page number strings were cumulated).
2. The automatic merge cannot spread a large number of page references over more than 2 replicates of the same entry. The Merge subprogram can duplicate the entry an unlimited number of times.

### **L - Track added entries?**

This option controls the screen display when you are adding new entries from the edit screen. If tracking is set to Yes you will be taken from one entry to the next so that the last entry added is highlighted and becomes the #logical previous entry# (for the purpose of copying, duplicating headings, flips, yank, etc.) If tracking is off then the entry at the top of the screen will remain the #logical previous entry# for all subsequent entries until F1 is pressed. New entries will be sorted out of sight into their correct position. The only important reason to set tracking to No would be when several entries are made from one #master# entry; on virtually every other occasion you should set tracking to Yes.

### **M - Set Colours**

This allows you to customise the colours used in MACREX. Click here to [find](#) out how.

### **W - Type of screen list**

You have the option of seeing your index on the edit screen in three different formats: a complete listing or in an indented format. The indented format is not intended to resemble the final index format; it has been introduced only as a means to facilitate checking of entries on screen. Setting the printing layout is a completely separate procedure (see 8.5-8.9 - insert link)

This allows three choices

- 1 Complete
- 2 Truncated
- 3 Wrap around

*Complete* contains all the headings and subheadings regardless of whether these are repeated. All the entries are listed with all their headings and subheadings in a row separated by commas. The differences are

1. The left margin of the listing is indented even when the lines wrap around.
2. The *hard* commas which form the divisions between the headings may be displayed in a different colour (or highlight on a monochrome screen). This colour can be set from the [colour setting menu](#).
3. The division between the text of the entry and page numbers may also be displayed in a different colour, also definable in the [colour setting menu](#).

*Truncated* does two things

1. It will not wrap a long entry onto the next line of the screen. It just truncates it at the right side of the screen.
2. The index will be displayed in a simple indented format. Repeated headings and subheadings will not be displayed on the screen, but the entry containing them will be printed from the first unique heading level and indented by three spaces per heading level.

*Wrap around*

This sets the index out like truncated (above) but wraps overlength lines onto the next line, with an indentation of 1 extra space.

This is usually the preferred option.

### **R - Page number increment**

### **S - Current page number**

These options are used when you are preparing an index from an unpaginated manuscript where the page breaks may have no relationship to those which will appear in the final copy. These two options control the duplication of page numbers using F9. If option **R** is set to anything other than 0, pressing F9 will insert the previous page number incremented by the amount specified by option **R**. This allows the index to be sorted into page number order at when the index is complete, and then the numbers converted to correct page numbers when these are known using a dedicated macro (insert link).

For normal use leave option **R** at **0** (zero).

### **X - Change index description**

You can change the description of the index you are working on to help identify it by selecting this option. Your description can be up to 77 characters long. This description will appear on the [file selector](#) screen when you are opening an index.

### **Y - Minutes between automatic saves**

The index entries in MACREX are stored in RAM and saved to the hard disk when you exist MACREX. If this feature is set to a number other than 0 (zero), the index will be saved to the disk at the interval specified. A box will appear on the screen while the save is taking place. You can carry on typing while this is taking place - no characters will be lost. This means that in the event of a power failure, computer crash, or other mishap the number of entries lost will be kept to a minimum. Note that this feature should not be used as an alternative to making backup (.MBK) files. Making a backup file is the most secure way of keeping your index safe. Note that automatic saving will not take place when you are in one of the subprograms (print or utilities) but is not necessary there.

I

If you are on the add entries screen those entries actually on the screen will not be saved, only those that have scrolled off the top

If you wish to save when it is convenient to you, rather than automatically at set intervals, set this option to 0 (zero) to disable it and press <ALT>1 at any point during the making of your index and this will prompt an "automatic save".

### **Z - Version 5 page number checking**

#### **8 - Version 6 page number checking**

If **8** is set to **Yes** the less stringent checks on the [format of the page number](#) used in MACREX Version 6 will be used. Similarly if **8** is set **Yes** the even less stringent version 5 checks will be used. These options should only be used if you want to work on an index prepared with one of the previous versions. Note that the page format used in Version 7/8 is needed for many of the page and volume features to work and also for the [Autocomplete/Authority](#) List to work.

If you want to abbreviate a heading by adding marks of omission (three points) at the end of a heading, you should add a *blocker* (~! ~ - F7) at the end of the heading and before the page number, as in the following example:

^Treatise on the Newtonian theory... ^~! ~ 223

If version 5 page number checking is chosen (by pressing Y at option Z) it is saved in the .INF file so it stays with this particular index only. It is not saved in the Option default file, so that every new index started will insist on the stricter page number checking unless this option is changed.

### **1 - Number of heading levels (fields)**

If this is set to **0** (zero) the number of levels of headings you can have, separated by *hard* commas (commas which are not enclosed in curly brackets) can be up to 20. If you want to limit the number you use, you can set this option to the maximum number you want, and if you make an entry that has more than this, you will see the error message

Wrong number of fi el ds

This can be useful if you are going to want to transfer your index to database or spreadsheet software where the number of fields is fixed.

### **2 - Keep scroll buffer?**



The [scroll buffer](#) is accessed from the Add only screen or the Add-on-edit screen by pressing F12. It will display a list of all you entries in the order that they were made. It is saved by default in a text file called <index-name>.cmd. If this option is set to **No** it will not be saved when you exit from MACREX. The only reason for setting this option to **No** would be if you were very short of RAM or disk space.

### 3 - Cumulative backup?

This option can be used to make a backup file with a new name that is generated automatically whenever you make backup file. The same option also appears on the Backup file submenu when you are making a backup file. The setting for this option will be saved whenever you save a MACREX options file. If it is set to **Yes** the prompt for overwriting a file name will not appear when making a backup file with the same name as a previous one. Instead a unique new file name will be generated for each save. The file names generated have the form <filename-specified>.xxx.mbk. <filename-specified> is the file name you are using - normally this would be the index name. xxx is a three digit number to the base 36. This uses the letters A-Z and the numerals 0-9 and is capable of 46656 values without repeating. mbk is the normal extension and means that the files will appear as expected in directory listings. The setting for [Number of cumulative backup files](#) on MACREX Options Menu 2 limits the total number of files that will be generated. The default is 50, meaning that when the 51st cumulative backup is made, the first one will be deleted, the 2nd to the 50th renumbered as the 1st to the 49th and the new backup created as number 50.

If MACREX Options Menu 2, [H - Cumulative backup on exit](#) is set to **Yes** a cumulative backup file will be made in the same way every time you exit from MACREX.

When you delete a MACREX index using the [Recycle index](#) option on the MACREX startup screen, you get the option to delete all, or all except that last, cumulative backup files so there is no need to worry about the proliferation of files.

### 4 - Printer lines per inch

### 5 - Printer characters per inch

These two options allow you to set the number of lines and characters per inch that will be used for a listing on the printer, if **A - List on printer** is set to **Yes** on this menu. Note that MACREX will only list on the Windows default printer, so, if you have more than one printer, you must set the one you want to use as the default using Windows **Control Panel->Printers**.

### 6 - Check for bad page ranges?

This feature checks page ranges to make sure the numbers are ascending. It will only work if [automatic merging](#) is set to **On** and [Squash page references](#) on the [Merge Options Menu](#) is set to **Yes** (these are defaults). It can be disabled by changing this option to **No**. For example if you type

Cows 117-116

You will see the message

Starting page of range is greater than ending page

It doesn't matter what [type of squash](#) is selected for this check to work. If you don't want your page references squashed set the type of squash to Unsquash - this will also have the advantage that you don't need to type the whole of the end of the page range,

Cows 117-8

will automatically be expanded to

Cows 117-118

Notes:

1. If you want to check that the page numbers you enter are within the range of pages existing in the book (to avoid typographical errors) use the [page range checking](#) options on the Merge Options Menu 2.
2. The behaviour of this feature depends on the setting chosen for the merge options menu [F - Squash page references?](#) If this is set to **No** then an entry such as Cows 21-6 will generate an error because 6 is less than 21. If it is set to **Yes** then this entry will not generate an error because it is assumed to be a shortened form of Cows 21-26.
3. Volume numbers (if present) are checked first. If the first volume number is lower than the second you get

the same message. If the volume numbers are the same or there are no volume numbers the page numbers are checked.

4. If the first and last page numbers are equal you will get the same error message.
5. Roman numerals are also checked if the option to recognize roman numerals is turned on.
6. Even if this option is set to No bad page ranges will still be tagged by running the merge subprogram if the Merge option 8 is set to **Yes**.
7. Page range checking is temporarily disabled during the conversion back from a page number order file to one in alphabetical order.
8. Bad page ranges are not checked for when an MBK file is loaded from **Input->Read, no checks** from the main menu. However they are checked then when using the Input->Read backup option. If you want to avoid these checks but retain the other checks on the entries when you read a backup file, you can use the **Read and correct a backup file** option in the **Utilities subprogram** where there are three settings (insert link)

E - Ignore missing ^ and \ in volume numbers?  
 F - Ignore bad page ranges?  
 G - Test page ranges allowing for squash?

These are all normally set to **No** so that you will have to correct any entries that have a malformed [page reference](#) (eg \10. 10\ ) or have bad page ranges. However you may wish to load entries such as \10. 10\ and have them automatically corrected using option [9 - Insert missing ^ and \ in vols](#) on the [Merge Options menu](#) or you may wish to load bad page ranges without being prompted and tag them via the merge option [8 - Tag bad page ranges](#) to deal with later. If you wish to do this you can do so by setting either or all options to **Yes**.

See also Merge options menu [8 - Tag page ranges](#)

## 7 - Hypertext markup features

This accesses the [hypertext menu](#) used for html indexing.

## 9 - Macro Options

This takes you to the [Macro Options Menu](#)

## 0 - Macrex Options Menu 2

This takes you to the [General Options Menu 2](#)

### Press <ESC> to save defaults

### ^L or ^S/F8 to load or save named option files

This will allow you to save the values that you have chosen, both for this menu and for the options in [Macrex Options Menu 2](#). Pressing <ESCAPE> will allow you to save them as a default, meaning that they will automatically be operational next time you use Macrex. The also gives you the option of saving them in the default directory (folder), which means that they will be active for all indexes that you work on, or in the index directory, which means that they will be active only for indexes created in that directory. See the [Setting MACREX Defaults](#) help page for more details.

### Default Settings

List on printer? **No**  
 List in a file? **Yes**  
 Name of list file <**index-name**>.lst  
 Capitalize flips? **No**  
 Check on deleted entries? **No**  
 Recognize roman numbers? **Yes**  
 Insert on? **Yes**  
 Autosort **On**  
 Automerge **On**  
 Track added entries? **Yes**  
 Screen width **100**  
 Screen height *maximum possible for the screen size - 5*  
 Set Code Page *default for the computer in use*  
 Beep with messages **Yes**  
 Page number increment **0**



Current page number **1**  
Intelligent flip? **Yes**  
Type of screen list **Wrap around**  
Minutes between automatic saves **5**  
Version 5 page number checking? **No**  
Number of heading levels (fields) **0**  
Keep scroll buffer? **Yes**  
Cumulative backup? **No**  
Printer lines per inch **6**  
Printer characters per inch **12**  
Check for bad page ranges? **Yes**  
Version 6 page number checking? **No**

*Last edited 20 September 2008. [Macrex Help Contents](#)*