Codex User's Guide

Table of Contents

Codex

Codex is an editor that lets you easily author and publish simple DITA topics and maps.

DITA

DITA (Darwin Information Typing Architecture) is an open standard XML file format that lets you author content in small topic files and assemble those topics into larger documents. DITA also lets you tag text semantically.

Each DITA topic contains a title and one or more paragraphs of text. When you're authoring a document, you author the actual content within topics. You can tag text either semantically or using style-based tags. An example of a semantic tag is **uicontrol**, which represents a user-interface control. An example of a style-based tag is **bold**.

Once you've authored your topics, you assemble them into a document using a DITA map. A map does not contain any content. Instead, a map contains several links to topic files, just like bookmarks to HTML pages. By arranging the links in a hierarchy, you create a structure for your document that will become its table of contents.

Finally, you publish your map to an output format, like PDF or HTML. During the publishing process, the content from your topics is assembled into the hierarchy specified by the map.

DITA Support

Codex is designed to enable non-technical authors to create and edit simple DITA topics and maps. As a result, Codex supports a limited sub-set of the DITA standard. In addition, Codex imposes additional limitations on how you can use supported DITA elements to ensure consistency and encourage best practices.

Codex is <u>not</u> designed for technical writers to create DITA topics and maps containing the full range of DITA elements and attributes. However, Codex can be a useful tool for technical writers to take notes that can then be further modified in a full-featured DITA editor.

You can use Codex to edit topics created in other DITA editors. However, you can only edit text that is contained within elements supported by Codex. **You <u>cannot</u> edit text that is contained within elements that are not supported by Codex. You <u>cannot</u> edit attributes that are not supported by Codex.**

You can use Codex to edit maps created in other DITA editors. However, you can only edit map elements supported by Codex. **You <u>cannot</u> edit map elements or attributes that are not supported by Codex.**

Codex updates are released about once a month, and include support for additional DITA elements. Your input is important. If there is a specific DITA feature that you would like to see supported in Codex, let us know!

<u>Topic Support</u>

Codex supports the following topic elements [attributes]:

- b, i, u [none]
- body [none]
- codeblock [none]

    - codeph within a codeblock is not supported

- codeph [none]
- image [none]
- menucascade [none]
- note [type=note, type=tip]
- ol, ul, li [none]

    - Consecutive lists are not supported
    - Nested lists can contain up to three levels

- p [none]
- sup, sub [none]
- table [none]
- title [none]
- topic [id]
- uicontrol [none]
- wintitle [none]

Note: Text can have only one inline tag applied, with the exception of b, i, and u which can be applied in any combination.

<u>Map Support</u>

Codex supports the following map elements [attributes]:

- map [title]
- topicref [type=topic, href]

Installing and updating Codex

Checking system requirements

Before installing Codex, verify that your system meets the minimum requirements for running Codex. You can find detailed systems requirements at: www.codex-systems.ca/requirements

Downloading and installing Codex

To download and install Codex:

1. Go to the *Download* page: www.codex-systems.ca/download
2. Complete the form and click **Submit**.

   Codex Systems will send you an email containing a link for installing Codex.

3. Check your email and click on the link to go to the *Install Codex* page.
4. Click **Download and Install Codex**.
5. When asked "Would you like to open or save this file?" click **Open**.
6. When asked "Are you sure you want to install this application on your computer?" click **Install**.
7. Set *Installation Preferences* and *Installation Location*, or accept the default settings, and click **Continue**.

Activating Codex

When you purchase a license for Codex, Codex Systems will email to you a license key.

To activate Codex:

1. Click **Help > Activate Codex**.
2. Enter your **Email address** and **License key**.
3. Click **Activate**.

Updating Codex and Adobe AIR

Separate updates for Codex and for Adobe AIR are made available periodically. Updates typically include new features and fixes to known issues. We recommend that you install updates as they become available.

Each time you start Codex, it checks the Internet to see if any updates are available. If an update is available, Codex displays a message saying an update is available. You can select whether to download the update and whether to install it right away or later.

Updating Codex or Adobe AIR will automatically restart Codex. So before installing updates for Codex or Adobe AIR, make sure you save your work in Codex.

Note: The trial version of Codex does not automatically check the Internet for updates. To update the trial version of Codex, you must manually download and install the new version of Codex.

Uninstalling Codex

Uninstalling Codex is similar to uninstalling any other application for your operating system.

To uninstall Codex:

- On Windows, open the *Control Panel* and select **Uninstall or change a program**, then select Codex.
- On Mac, move the Codex application bundle from the *Applications* folder, or other install location, to the Trash.

Uninstalling Adobe AIR

The Codex installer automatically detects if your system has Adobe AIR installed. If not, the Codex installer will automatically install Adobe AIR as well.

When you uninstall Codex, Adobe AIR is not automatically uninstalled. This is because you may have other applications that make use of Adobe AIR.

If you are sure that Codex is the only application making use of Adobe AIR, then after uninstalling Codex, you may also want to uninstall Adobe AIR.

To uninstall Adobe AIR:

* On Windows, open the *Control Panel* and select **Uninstall or change a program**, then select Adobe AIR.
* On Mac, run the uninstaller located in /Applications/Utilities/Adobe Installers.

New features

Codex 1.5

January 2012

This update of Codex includes the following new features and improvements:

* **Publishing:**

    * Export maps and topics to Office Open XML format.

Codex 1.4

November 2011

This update of Codex includes the following new features and improvements:

* **Improved topic editing:**

    * Insert tables into topics
    * Open topics containing unsupported DITA elements/attributes

* **Improved map editing:**

    * Edit map titles

Codex 1.3

September 2011

This update of Codex includes the following new features and improvements:

- **Improved topic editing:**

  - Insert images into topics

Codex 1.2

July 2011

This update of Codex includes the following new features and improvements:

- **New Paragraph formats:**

  - Code Block
  - Note
  - Tip

- **New Character format:**

  - Codeph

Codex 1.1

June 2011

This update of Codex includes the following new features and improvements:

- **Improved lists:**

  - Start a list simply by typing **-** or **1.** at the beginning of a paragraph. Then type your text and press Enter.
  - Paragraph formats are now enabled or disabled based on the cursor location or selection to ensure you always create well-formed lists.

- **Improved text selection:**

  - Double-click and drag to select words.
  - Triple-click and drag to select paragraphs.

- **Improved text editing:**

  - Drag and drop text.
  - Find and replace text within a topic.
  - Paste unformatted text.

- **Improved map editing:**

  - Drag and drop multiple files from your operating system file browser into the Map Editor.
  - Create child topics using drag and drop.
  - Sort topics alphabetically.

- **Miscellaneous improvements:**

  - Make Codex the default application for opening .dita and .ditamap files.
  - Close all open topics and maps.

Codex interface

The Codex interface consists of the following:

- The *Topic Editor* contains a toolbar, a toolbox (for formatting text), and an editor area (for typing text).
- The *Map Editor* contains a toolbar and an editor area (for editing maps).

The Codex interface also includes a menu bar.

Making Codex the default application

To make Codex the default application on your system for opening .dita and .ditamap files:

1. Click **Tools > Associate Files**.

Getting help

To open the Codex Help:

1. Click **Help** .

Note: The Codex Help is also available as a PDF:

Contacting Support

To contact support:

1. Click **Help > Contact Support**.

Submitting feedback

To submit feedback:

1. Click **Help > Submit Feedback**.

Exiting Codex

To exit Codex:

- On Windows, click **File > Exit**

- On Mac, click **Codex > Quit Codex**

Topics

A topic is a modular unit of information. A topic contains a title and one or more sentences or paragraphs. A topic can also contain unordered/bullet lists and ordered/numbered lists.

Topic files have a .dita extension.

Creating topics

To create a topic:

1. Click **Create new topic** .

Opening topics

To open a topic:

1. Click **Open** .
2. Select the topic file and click **OK**.

You can also open a topic by doing any of the following:

*   In the *Map Editor*, double-click the topic file.
*   In the operating system file browser, double-click the topic file.

Editing topics

Typing text

Typing text in Codex is similar to other editors and word processors, but there are a few things that are different:

*   The first line of a topic is always the topic title and is formatted automatically.
*   You cannot enter more than one consecutive space. Codex automatically replaces consecutive spaces with a single space.
*   You cannot enter a space at the beginning of a paragraph.

Note: Within a **Code Block** paragraph, you can enter consecutive spaces or spaces at the beginning of the paragraph.

Selecting text

To select text:

*   Click-drag.

- Click the beginning of the text and Shift-click the end of the text.
- Double-click to select a word. Double-click and drag to select multple words.
- Triple-click to select a paragraph. Double-click and drag to select multiple paragraphs.

Note: The carriage return at the end of each paragraph contains the format information for the paragraph. When you click-drag left-to-right to select an entire paragraph, the carriage return is automatically selected. However, when you click-drag right-to-left to select an entire paragraph, the carriage return is not automatically selected. If you want to copy a paragraph and keep its format intact after pasting, click-drag left-to-right to select the entire paragraph. If you want to copy a paragraph and format it the same as the paste location, click-drag right-to-left to select the entire paragraph.

Starting lists, notes and tips

To start a bullet list:

1. Start a new paragraph and type:

    -

    then type the first list item text.

2. Press Enter.

    The paragraph is automatically formatted as **Bullet List 1.**

To start a number list:

1. Start a new paragraph and type:

    1.

    then type the first list item text.

2. Press Enter.

    The paragraph is automatically formatted as **Number List 1**.

To start a note:

1. Start a new paragraph and type:

    Note:

    then type the note text.

2. Press Enter.

    The paragraph is automatically formatted as **Note**.

To start a tip:

1. Start a new paragraph and type:

Tip:

then type the tip text.

2. Press Enter.

   The paragraph is automatically formatted as **Tip**.

Formatting lists

To format a list:

1. Click on or select the text.
2. In the *Toolbox*, click the **List** format:

   - Normal
   - Bullet List 1
   - Bullet List 2
   - Bullet List 3
   - Number List 1
   - Number List 2
   - Number List 3

Note: To continue a list item onto another paragraph, press Shift+Enter.

Note: The first paragraph within a topic is automatically formatted as the topic title. You cannot apply a List, Paragraph or Character format to the topic title.

Note: Multi-level lists follow certain rules. For example, Bullet List 2 paragraphs must have a parent Bullet List 1 or Number List 1 paragraph. Codex may sometimes disable certain list formats to ensure your lists are well-formed.

Indenting and outdenting list items

To indent or outdent list items:

1. Click on or select the list items.
2. Press Tab (indent) or Shift+Tab (outdent).

Note: Multi-level lists follow certain rules. For example, Bullet List 2 paragraphs must have a parent Bullet List 1 or Number List 1 paragraph. Codex may sometimes prevent you from indenting or outdenting list items to ensure your lists are well-formed.

Formatting paragraphs

To format a paragraph:

1. Click on or select the text.
2. In the *Toolbox*, click the **Paragraph** format:

- Normal
- Code Block
- Note
- Tip

Note: To continue a Code Block, Note, or Tip onto another paragraph, press Shift+Enter.

Note: The first line within a topic is automatically formatted as the topic title. You cannot apply a List, Paragraph or Character format to the topic title.

Formatting text

You can only apply one format to text.

To format text:

1. Select the text.
2. In the Toolbox, click the **Character** text format:

   - Normal
   - **Bold**
   - *Italic*
   - <u>Underline</u>
   - ***Bold Italic***
   - **<u>Bold Underline</u>**
   - *<u>Italic Underline</u>*
   - ***<u>Bold Italic Underline</u>***
   - Superscript
   - Subscript
   - UIcontrol
   - Wintitle
   - Codeph

Note: You can create a DITA <menucascade> by typing **Menu > Menu Item** and formatting the text as **uicontrol**. Codex will automatically format the text within the DITA file as <menucascade><uicontrol>Menu</uicontrol><uicontrol>Menu item</uicontrol></menucascade>.

Inserting special characters

To insert special characters:

1. Open the *Special Characters* application for your operating system:

   - On Windows, click **Start > All Programs > Accessories > System Tools > Character Map**
   - On Mac, click **Edit > Special Characters**

2. Select and copy the character.

3. In Codex, position the cursor and:

- On Windows, click **Paste** .
- On Mac, in the *Characters* window, press **Insert**.

Note: You can insert the following special characters using shortcut keys:

- Non-breaking space: Ctrl+Shift+Space

Inserting images

You can insert images anywhere within a topic except within the topic title.

You can insert images in any format. However, only images in GIF, JPEG, or PNG format are displayed within Codex. If you insert an image in any other image format, a placeholder image is displayed within Codex. However, the actual image is used during publishing (when using a third-party publishing solution).

Images smaller than 100 pixels by 100 pixels are displayed at their actual size within Codex. Larger images are displayed within Codex at 100 pixels by 100 pixels (that is, scaled down). However, all images are published at their actual size (when using a third-party publishing solution).

To insert an image into a topic:

1. Place the cursor at the location to insert an image.
2. Click **Insert Image** .
3. Select the image file and click **Open**.

Tip: You can also insert an image into a topic by dragging an image file from your operating system file browser into Codex.

Displaying image information

To display image information:

1. Select the image.
2. Select **View > Image Properties**.

Opening images

From within a topic, you can open an image in your system's default application for the image's format.

To open an image:

1. Select the image.
2. Click **View > Open Image**.

Inserting tables

You can insert a table anywhere within a topic except in the topic title.

To insert a table:

1. Place the cursor at the location to insert a table.
2. Click **Insert Table** to open the *Table Editor*.
3. Edit the table.

   - To enter a column heading, double-click the gray column heading area. To create a table without column headings, leave the column heading areas blank.
   - To add a row, click a cell and then click **Add Row Above** or **Add Row Below** .
   - To add a column, click a cell and then click **Add Column Before** or **Add Column After** .
   - To delete a row, click a cell within the row and then click **Delete Row** .
   - To delete a column, click a cell within the column and then click **Delete Column** .
   - To format text, use the *Toolbox* on the right of the *Table Editor*.

4. Click **OK**.

   A table icon is inserted into the topic.

   Note: This icon represents the table and contains all table data. If you delete this icon, the table and all of its data will also be deleted.

Editing tables

To edit a table:

1. Select the table icon within the topic.

2. Click **Edit Table** to open the *Table Editor*.
3. Edit the table.
4. Click **OK**.

Collapsing or expanding unsupported elements

When you open a topic containing DITA elements that are not supported by Codex, the unsupported elements are displayed in their entirety (in red). You can collapse the display of unsupported elements to simplify the display of the topic.

To collapse unsupported elements:

1. Click **Tools > Collapse Unknown Elements**.

To expand unsupported elements:

1. Click **Tools > Expand Unknown Elements**.

Cutting, copying and pasting text

To cut text:

1. Select the text.
2. Click **Cut** .

To copy text:

1. Select the text.
2. Click **Copy** .

To paste text:

1. Click the location to paste.
2. Click **Paste** .

To paste text without any formatting:

1. Click the location to paste.
2. Click **File > Paste Unformatted Text**

Moving and copying text

To move text:

1. Select the text.
2. Within the selected text click and hold down the mouse button, drag to another location within the topic, and release the mouse button.

To copy text:

1. Select the text.
2. Hold down the Ctrl key.
3. Within the selected text click and hold down the mouse button, drag to another location within the topic, and release the mouse button.
4. Release the Ctrl key.

Finding and replacing text

To find and replace text:

1. Click **Find** .
2. Enter the text to **Find** and **Replace**
3. Click:

   - **Replace All** to replace all occurrences
   - **Replace** to replace the current occurrence
   - **Replace & Find** to replace the current occurrence and find the next one
   - **Previous** to find the previous occurrence
   - **Next** to find the next occurrence.

Undoing and redoing edits

To undo:

1. Click **Undo** .

To redo:

1. Click **Redo** .

Hiding or showing the Toolbox

To hide the *Toolbox*:

1. Click **View > Hide Toolbox**

To show the *Toolbox*:

1. Click **View > Show Toolbox**

Saving topics and maps

To save the active topic or map:

1. Click **Save** .

To save all open topics and maps:

1. Click **File > Save All**

To save the active topic or map as a new file:

1. Click **File > Save As**

Closing topics and maps

To close the active topic or map:

1. Click **Close** ✖ in the Topic Editor or Map Editor tab.

To close all open topics and maps:

1. Click **File > Close All**

Maps

A map is a hierarchical list of topics. A map usually represents a document or a section of a document.

Maps do not contain content. They contain only links to topics. The actual content is contained within the topics. Maps can also contain links to other maps.

When a map is published, the publishing process pulls together the content from the necessary topics to form a complete document.

Maps are also known as *DITA maps*.

Map files have a .ditamap extension.

Creating maps

To create a map:

1. Click **Create new map** .

Opening maps

To open a map:

1. Click **Open** .
2. Select the map file and click **OK**

You can also open a map by doing any of the following:

*   In the *Map Editor*, double-click the map file.
*   In the operating system file browser, double-click the map file. (You may also need to associate map files with Codex.)

Editing maps

Adding topics

To add a topic to a map:

1. Select the topics and maps in your operating system file browser and drag them into the *Map Editor*

Adding child topics

To add a topic as a child of another topic (parent):

1. In the *Map Editor*, click the parent topic.

2. Click **Add child** .
3. Select the topic file and click **OK**

Adding sibling topics

To add a topic as a sibling of another topic:

1. In the *Map Editor*, click the topic.

2. Click **Add sibling** .

3. Select the topic file and click **OK**

Removing topics and maps

To remove a topic from a map:

1. In the *Map Editor*, click the topic.

2. Click **Delete** .

When you remove a topic from a map, you are only removing the link from the map to the topic. The topic file still exists on your system.

Moving topics

To move topics within a map:

1. Click the topic to select it.

   To select a group of topics, click the first topic and Shift-click the last topic.
   To select multiple topics, Ctrl-click each topic.

2. Do any of the following:

   - Click **Move up** .
   - Click **Move down** .
   - Drag the selected topics and drop them in a new position.

Sorting topics

To sort topics from A to Z:

1. Select a group of consecutive topics or select a single topic that contains child topics.

2. Click **Sort A to Z** .

To sort topics from Z to A:

1. Select a group of consecutive topics or select a single topic that contains child topics.
2. Hold down the Shift key.

3. Click **Sort Z to A** .
4. Release the Shift key.

Nesting maps

A map contains links to topics. But a map can also contain links to other maps. This lets you more easily manage the structure of your document.

- You can re-use a sub-map multiple times within one master map or within several different master maps.
- By using one master map that links to several sub-maps, several writers can work on a single document. Each writer can be working on their section (sub-map).

To nest maps, add a map to a map the same way you add a topic to a map.

Expanding and collapsing maps

To expand a section within a map:

1. Click **Expand** (Windows) or **Expand** (Mac).

To expand an entire map:

1. Click **Expand all** .

To collapse a section within a map:

1. Click **Collapse** (Windows) or **Collapse** (Mac).

To collapse an entire map:

1. Click **Collapse all** .

Titling maps

A map can have a title. You may want to give your maps titles to make them easier to manage. Map titles are displayed in the map editor tab and in the Codex window title bar.

To title a map:

1. Click the root element of the map (named **map** by default) to select it.
2. Right-click and select **Edit Title**.
3. Enter a map title and click **OK**.

Saving topics and maps

To save the active topic or map:

1. Click **Save** ![save icon] .

To save all open topics and maps:

1. Click **File > Save All**

To save the active topic or map as a new file:

1. Click **File > Save As**

Closing topics and maps

To close the active topic or map:

1. Click **Close** ![close icon] in the Topic Editor or Map Editor tab.

To close all open topics and maps:

1. Click **File > Close All**

Printing

You can print individual topics or all topics contained within a map.

Printing is a convenient way to review the content in your topics. Printing from Codex is not intended for final output of your content. You cannot control the appearance of content printed from Codex.

Note: Printing of tables is not supported.

Setting page size for printing

To set page size for printing:

1. Click **File > Page Setup**
2. Set the *Page Setup* options and click **OK**

Printing topics

To print the active topic:

1. Click **Print** .
2. Set the *Print* options and click **OK**

Printing maps

You can print all of the topics within a map.

To print the active map:

1. Click **Print** .
2. Set the *Print* options and click **OK**

Publishing

When you author a document in Codex, you author the actual content within *topics*, and assemble those topics into a document using a *map*. The topics and map are saved in DITA XML format. But to deliver the document to your audience, you need to convert it into a format that they can read, like PDF or HTML. This is referred to as *publishing*.

In Codex you can publish a map or topic to Office Open XML format. You can open Office Open XML documents (*.docx) in many word processing applications. So you can either deliver the Office Open XML document to your audience, or use your word processing application to convert the document to PDF, HTML, or any other supported format.

You can also use third-party tools to publish DITA XML content into other formats. Standalone publishing tools include:

- DITA Open Toolkit
- DITA2Go
- WebWorks ePublisher
- XMLmind XSL-FO Converter

Many DITA editors and DITA content management systems also allow you to publish DITA content.

To publish a map or topic:

1. Click **Publish** .
2. Select an Office Open XML template file (*.docx) and click **Open**.

    See *Creating publishing templates* for information on creating templates.

3. Enter a file name for the output Office Open XML document file (*.docx) and click **Save**.

Creating publishing templates

To create a publishing template:

1. Download the sample template at
2. Open the sample template in your word processing application.
3. Modify the visual design of the template:

    - Page layout
    - Style properties (**Note:** Do not modify Style names).
    - Headers, footers, and page numbering

4. Save the template in Office Open XML format (.docx).

Scaling images after publishing

If your topics contain images, sometimes the images in the published document may be incorrectly sized. For example, rectangular images may appear square, large images may appear small, and so on. If this occurs, do the following:

1. Download the file:
2. Open **ScaleImagesMacro.docm** in Microsoft Word and add the **ScaleImages** macro to your **normal.dotm** template:

    a) On the *View* tab, click **Macros > View Macros**.
    b) Click **Organizer**, and copy **NewMacros** from **ScaleImagesMacro.docm** to **Normal.dotm**.
    c) Close **ScaleImagesMacro.docm**.

3. Open the published document in Microsoft Word and run the **ScaleImages** macro:

    a) On the *View* tab, click **Macros > View Macros**.
    b) Select **ImageScale** and click **Run**.
    c) Enter the percent value to scale all images.

        To scale all images to their actual size, use the default value of 100.

    d) Click **OK**.
    e) Save the document.

Limitations and known issues

There are currently no limitations or known issues.

For the latest information see: www.codex-systems.ca/limitations