

SONAR[®] BOOKENDS[®] InSeq

Automatic Figure and Table Numbering Tool
FOR ADOBE[®] InDesign[™]

User's Guide 21.x **Macintosh and Windows**



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Section I Introduction

Sonar Bookends® InSeq™ is a numbering/sequencing/text-substitution tool for Adobe InDesign™ that allows you to quickly and easily add, delete, or modify sequence numbers for figures, tables, paragraphs, photographs, etc. in a document, create running headers and footers, and substitute text into placeholders. Each entry is controlled using a powerful, but easy to understand, *macro* language. A document can consist of one file, many files, one InDesign “book,” or many “books.”

Note: In this manual the term *object* refers to figures, tables, paragraphs, photographs, or any other item that you want to number.

Without Sonar Bookends InSeq, numbering objects and creating running headers/footers in a document is very time-consuming. And, unless you take extreme care, incorrect references can be created whenever objects are added or removed from a document. With Sonar Bookends InSeq objects are numbered automatically. Running headers and footers are created dynamically based on text marked with style sheets. If you insert or delete an object, all remaining object numbers, including references to those objects, are adjusted in seconds with one command. With an unlimited number of counters that can be incremented or decremented programmatically as well as displayed in decimal, Roman numerals, or letters, you can create elaborate numbering schemes. For example a paragraph number could look like this: **4.18.6.b.iv**. The first number might increment for each chapter, the second number increment for each section, etc. You control of when a variable increments or decrements.

Sonar Bookends InSeq uses a “labeling” system to make creating and updating object numbers and their references a snap. Each object is matched to its references by sharing the same arbitrary label. The power of the labeling systems is that you can create references to objects that do not exist yet. This allows you to put references into a document *as it is being written*. Objects and references are linked together in the completed document later when you tell Sonar Bookends InSeq to update sequence numbers.

For example, you can enter a reference to a table of prices before the actual table has been created. Or you can put in a figure before there are any references to it. Whenever you direct Sonar Bookends InSeq to update the sequence numbers, it will check to make sure that all destinations with labels are referenced and all references have at least one matching destination. However, you don’t need to have references, only destinations. Also, a label is not needed for any destination that is not referenced.

If a document is changed, with the click of a mouse all objects are renumbered and the appropriate numbers are also placed in any references. Running headers and footers are updated and any other text substitutions are performed as well. All substitutions have a character style sheet associated with them (one for references and one for destinations), making formatting of the substitutions easy. A simple change to the appropriate style sheet and the substitutions are reformatted according to your specifications.

A *reference* label is placed in the body of a document wherever you are referencing an object. A *destination* label is placed in the identifying text next to an object.

Only when you tell Sonar Bookends InSeq to update the sequence numbers does it check for matching reference and destination labels. Each reference label (if it exists) must have a single matching destination label. However, a destination label can have zero or any number of matching reference labels.

Figure 1.1 shows the relationship between reference and destination labels.

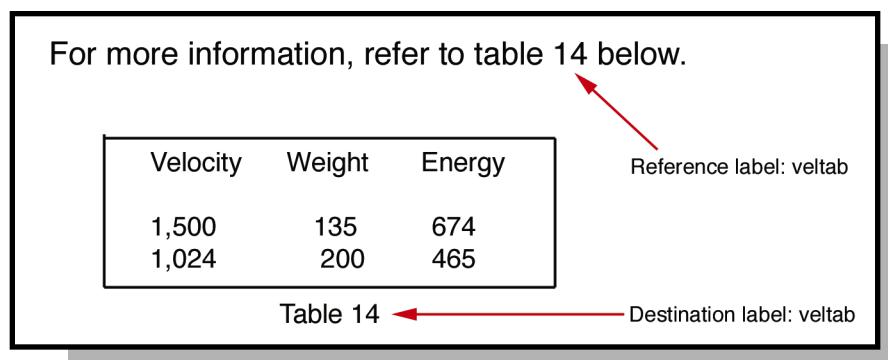


Fig. 1.1

The document can consist of one file or many files. By default the counters that control object numbering run sequentially through all of the files. Using a preference, two special counters, (“TABLE” and “FIGURE”), can be set to restart at one for each file. Optionally, all counters can be reset to any value that is zero or greater, at any time, programmatically, using the InSeq’s macro language.

Installing Sonar Bookends InSeq

To install the Sonar Bookends InSeq plug-in, see the **ReadMe** file in the *Sonar Bookends InSeq* folder.

Activating Sonar Bookends InSeq

When first installed, Sonar Bookends InSeq runs in demonstration mode. Demonstration mode allows you to create an unlimited number of figure and table sequences, but only the first five objects are filled-in.

To remove the restriction on the number of figure and table sequences that are generated, you must purchase Sonar Bookends InSeq. After payment is received, you are given a special serial number to enter into the registration dialog box, fully and instantly enabling Sonar Bookends InSeq's features.

To purchase Sonar Bookends InSeq, contact Virginia Systems at:
Email: sales@virginiashsystems.com

Technical Support

Technical support is only provided to registered customers. Upgrade notices are sent to the person and address contained in Virginia Systems' software registration database.

Along with any questions, please include your:

- Name
- Serial number
- Telephone number
- Email address

Contact Virginia Systems' technical support at:

Email: support@virginiashsystems.com

Section II Creating References

A *reference* tells Sonar Bookends InSeq where to put a **copy** of the sequence number for a given object.

To create a reference put the cursor where the object sequence number is to be placed and select *Create Reference...* as shown in figure 2.1.

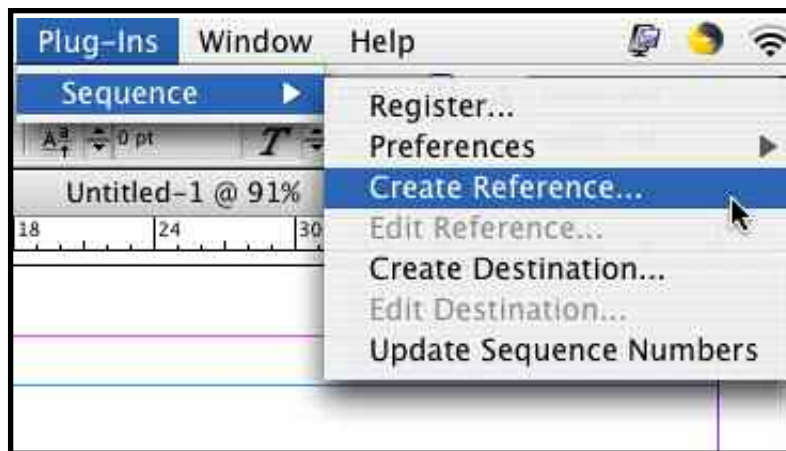


Fig. 2.1

The dialog box in figure 2.2 will then appear to let you either select a label name from a list or manually enter the name of a label. A matching label marks, or will mark, the desired destination. The label can be anything you want, as long as it matches the destination label exactly in both characters and case (“Smith” and “smith” would not match). **The label list consists of all reference and destination labels that are currently defined in the document.**

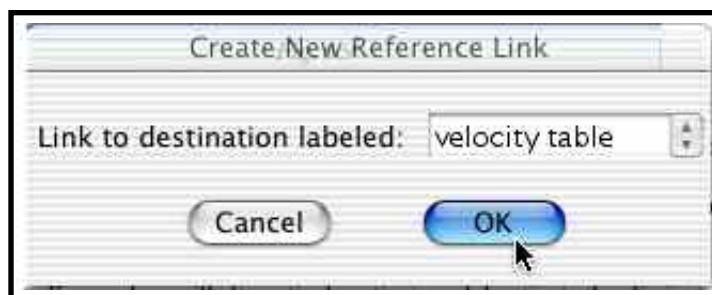


Fig. 2.2

After clicking *OK*, two question marks are inserted where the actual sequence number will eventually go as a visual place-holder. See figure 2.3.

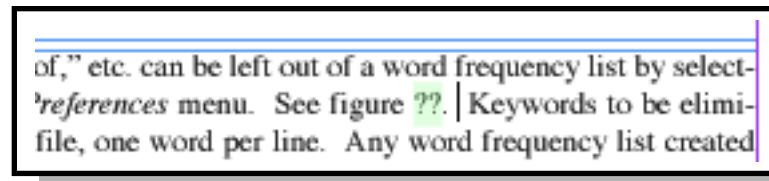


Fig. 2.3

Note that reference place holders are colored to make them stand out. Destinations are also colored, but with a different color to help differentiate the two. The color will not appear on a printed version of the document. When the sequence number for the object is inserted later, the sequence number will also be marked with the same color. Each reference is also marked with a style sheet named “SequenceRef.” By editing this style sheet, all references can be reformatted.

The highlight coloring on the screen can be turned off by unchecking *Highlight* in the *Preferences* menu as shown in figure 2.4.

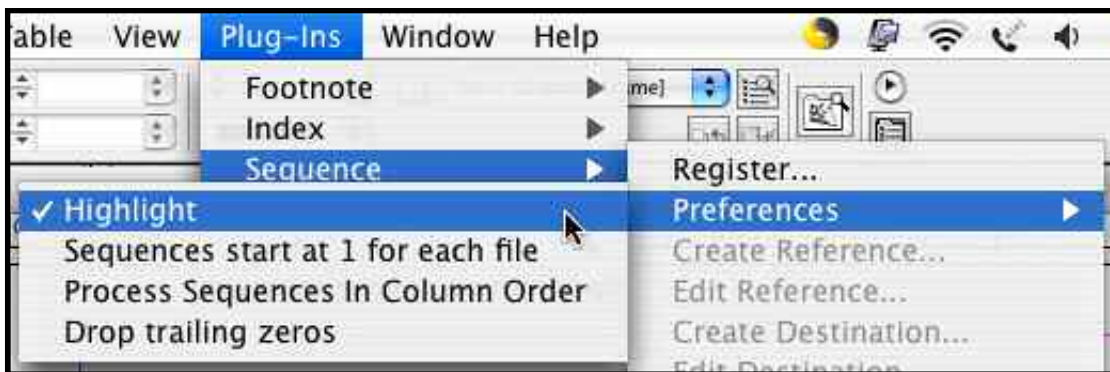


Fig. 2.4

If turned off, the highlighting will come back on automatically when the next reference or destination label is created.

Tip: You can quickly and easily duplicate a reference by simply copying the reference as inserted into the text of the document (initially “??”) and pasting it as desired.

Section III Creating Destinations

Destinations appear with an object and contain the sequence number for that object. The sequence number of the destination is put in all references to that object.

To create a destination, click where the sequence number is to be inserted and then select *Create Destination...* as shown in figure 3.1.

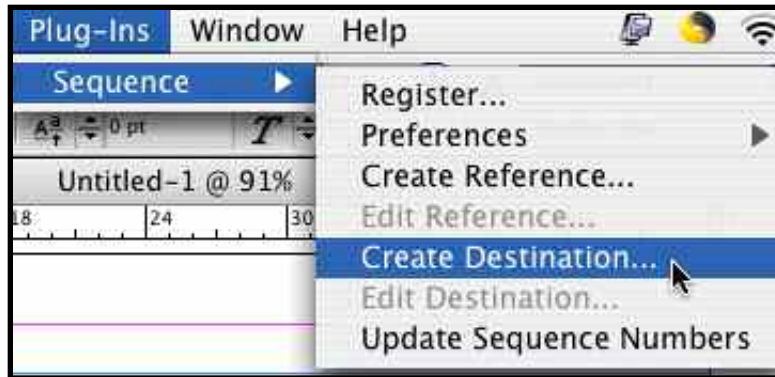


Fig. 3.1

The dialog box in figure 3.2 will then appear to let you either select a label name from a list or manually enter the label name. If there is to be no reference to this destination, then the label can be left blank. The label can be anything you want, as long as it matches any associated reference label exactly in both characters and case (“Smith” and “smith” would not match). **The label list consists of all reference labels in the document that do not yet have a matching destination - duplicate destination labels are not allowed.**

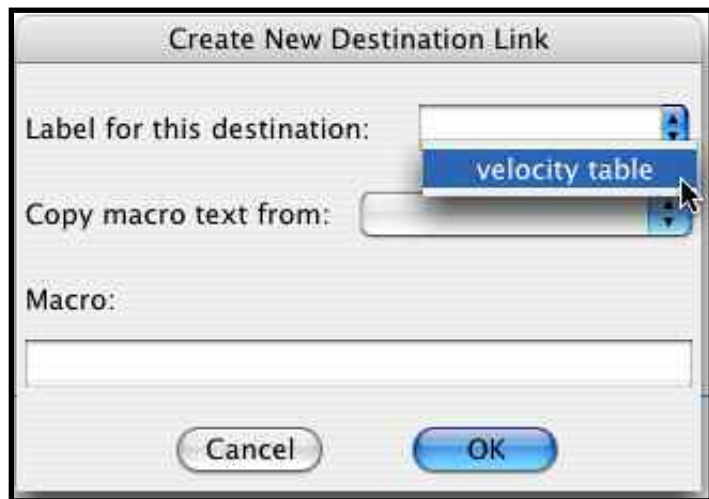


Fig. 3.2

Referring to figure 3.2, the *Macro* line is where you enter the instructions on how to build and format the destination result. The *Macro* instructions let you define sequence numbers, running headers and footers, and general text substitutions.

Figure 3.3 shows a typical macro definition. In this example, there is a two field table number. The first field is the chapter number and the second field is the table number within the chapter. The ‘+’ character after **theTable** will cause that counter to be bumped by one for the next destination. There is also a period between the two numbers. So a table number would look like: **6.21**. The next table number in the chapter would be **6.22** (assuming the exact same macro definition).

The next chapter discusses how to program the macro field.



Fig. 3.3

The *Copy macro text from:* pop-up button provides a quick and easy way to duplicate a macro from a previous destination. In figure 3.4 and 3.5 the macro definition for ‘velocity table’ is put in the ‘energy table’ destination. Once copied, the definition can be changed if necessary.

Note: To be able to copy the macro definition from a previous destination, that destination must have been assigned a label.

Tip: You can quickly and easily duplicate a non-labeled destination by simply copying the destination as inserted into the text of the document (initially "??") and pasting it as desired.

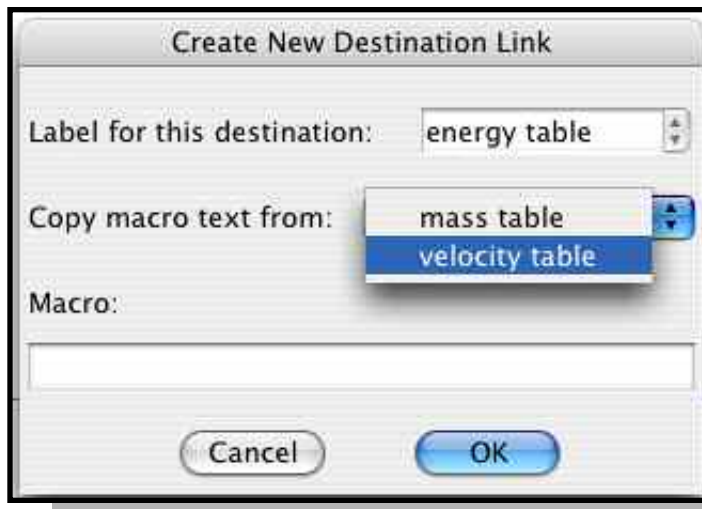


Fig. 3.4

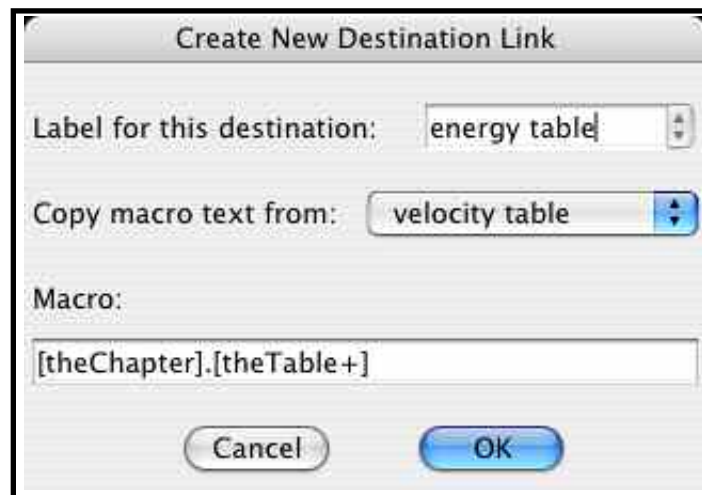
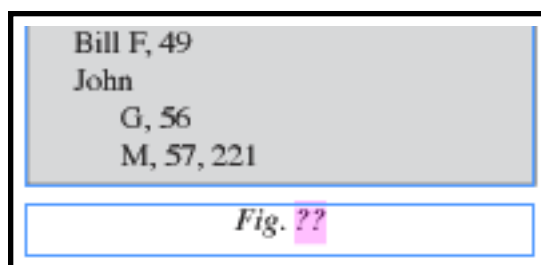


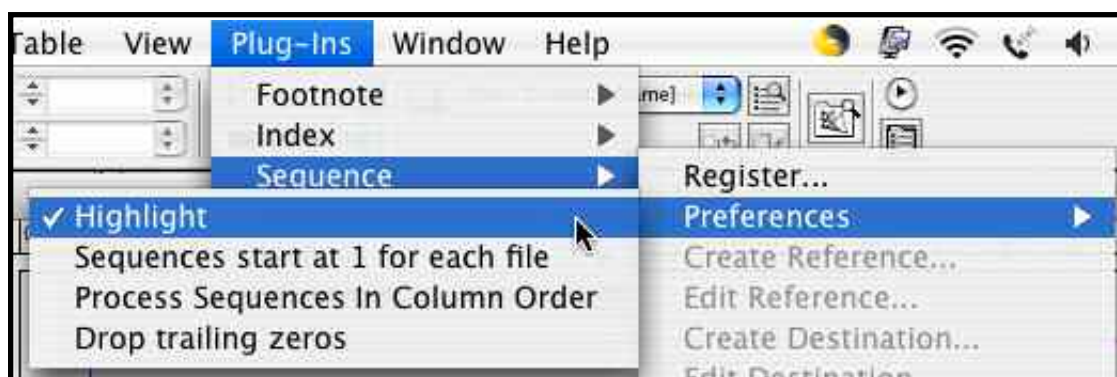
Fig. 3.5

After clicking *OK*, two question marks (??) are inserted and highlighted as shown in figure 3.6 to show that it is a destination and to serve as a visual placeholder. The question marks will be replaced with a sequence number whenever Sonar Bookends InSeq is told to update the sequence numbers.

*Fig. 3.6*

The color that is used to mark each destination will not appear on a printed version of the document. When the sequence number for the destination is inserted later, the sequence number will also be marked with the same color. Each destination is marked with a style sheet named “SequenceDest.” By editing this style sheet, all destination sequence numbers can be reformatted.

The highlight coloring on the screen can be turned off by unchecking *Highlight* in the *Preferences* menu as shown in figure 3.7.

*Fig. 3.7*

If turned off, the highlighting will come back on automatically when the next reference or destination label is created.

Section IV Macros

Macros are the heart of Sonar Bookends InSeq as they control how sequence numbers, running headers and footers, and text substitutions are defined and formatted.

Macros consist of one or more variables and ornamental text.

Creating and Defining Variables

Variables are alphanumeric names that can contain numeric counters, running headers and footers, or any arbitrary text. Variable names cannot contain spaces.

A variable is created automatically the first time it is used in a document. By default a variable is numeric and is assigned a value of 1. A variable is enclosed in square brackets:

[chapter]

Alternatively a variable can be assigned a specific character or numeric value by putting an = character after the variable and then putting the desired value. For a character value, enclose the text in double-quote marks.

[chapter=10]
[name="Energy Coefficients"]

In the above example, anywhere the variable **chapter** is used, the value **10** will be substituted. Using **name** will result in the string **Energy Coefficients** being substituted.

Variables can be redefined at any time and the new value takes effect from the redefinition location to the next redefinition location or to the end of the document, whichever comes first.

There are some ‘predefined’ variables that are used in running headers/footers and that are used to simplify numbering sequences that consist solely of Arabic numbers with period separators (“1.1.12”). These macros are described later in this section.

Incrementing and Decrementing Variables

Numeric variables are used as counters for numbering objects like figures, tables and paragraphs. You can increment or decrement a counter either before it is used or after it is used. To increment a counter after it has been used, put a **+** (plus) character or **-** (minus) character, respectively, *after* the variable name. (The examples below assume that the variable **chapter** has an initial value of 1):

[chapter+]

The first time **[chapter+]** is used it will substitute a **1**, the next time it is used it will substitute a **2**, etc.

To increment or decrement a counter before it is used, put a **+** character or a **-** character, respectively, *before* the variable name:

[+chapter]

The first time **[+chapter]** is used it will substitute a **2**, the next time it is used it will substitute a **3**, etc.

Variables can also be incremented or decremented by a value other than 1 by supplying the desired value after the **+** character or **-** character, respectively:

[chapter+10]

The first time **[chapter+10]** is used it will substitute a **1**, the next time it is used it will substitute a **11**, etc.

Formatting Variables

You can control how numeric values in a variable are formatted. Numeric values can be formatted as a decimal value (the default if you do nothing), a lowercase Roman numeral, an uppercase Roman numeral, a lowercase letter, or an uppercase letter.

To format a numeric value as a lowercase Roman numeral, put **:i** after the variable name:

[chapter:i] or **[chapter+:i]** or **[chapter=10:i]**

The first time `[chapter+:i]` is used it will substitute an `i`, the next time it is used it will substitute a `ii`, etc.

For an uppercase Roman numeral use `:I` after the variable name:

`[chapter:I]`

The first time `[chapter+:I]` is used it will substitute a `I`, the next time it is used it will substitute a `II`, etc.

For a lowercase letter use `:a` after the variable name:

`[chapter:a]`

The first time `[chapter+:a]` is used it will substitute an `a`, the next time it is used it will substitute a `b`, etc. After `z`, the numbering continues `aa`, `bb`, `cc`, etc.

For an uppercase letter use `:A` after the variable name:

`[chapter:A]`

The first time `[chapter+:A]` is used it will substitute an `A`, the next time it is used it will substitute a `B`, etc. After `Z`, the numbering continues `AA`, `BB`, `CC`, etc.

Special Variables For A Common Numbering Sequence

Sonar Bookends InSeq has nine reserved variable names that are used to *greatly* simplify the generation of sequence numbers that consists only of Arabic numbers separated by periods, like this 4 level example:

`1.16.4.2`

These variables allow for sequences from one level, such as `4`, up to nine levels, such as `1.14.3.21.4.3.1.56.8`

Note: The format cannot deviate from this requirement. Thus, Roman numerals, letters, or separators other than periods are not possible with these special variables. However, macros using regular variables can easily generate almost any arbitrary numbering sequence.

The nine variables consists of a digit from 1 to 9 followed by the word “Level” as shown in the examples below:

[1Level]
[2Level]
[3Level]
[3Level]
[4Level]
[4Level]
[2Level]

There is no need to increment, decrement, or format these variables. Formatting and any incrementing or decrementing are done automatically!

Here is the sequence that would be generated using the macros above:

1
1.1
1.1.1
1.1.2
1.1.2.1
1.1.2.2
1.2

Running Headers and Footers

A running header (like you see at the top of each page in a dictionary) or running footer can be created using Sonar Bookends InSeq. A running header or footer is usually done in pairs: the first item on the page and the last item on the page make up the header or footer. With InSeq, character or paragraph style sheets are used to mark all the desired items that are to be considered for the running header or footer. InSeq dynamically determines which of the marked items are the first and last on each page.

There are 10 different reserved variable names that can be used to put up to 10 different running headers and footers in a document. The running header and footer variable names are paired into the **left running-header**, which is the *first* occurrence of an item on a page, and the **right running-header**, which is the *last* occurrence of an item on a page. There is a special case called a **previous running-header**, which is a left running-header, except that if the item at the top of a page is

continued from the previous page, then the last header from the previous page is used as the first header on the current page.

The 10 left running header and footer variable names are:

LRH0 - LRH9 (Left Running Heder #)

The 10 right running header and footer variable names are:

RRH0 - RRH9 (Right Running Heder #)

The 10 previous running header and footer variable names are:

PRH0 - PRH9 (Previous Running Heder #)

The style sheets names that mark the items to be considered for the running headers and footers must begin with **RUN0** through **RUN9**, to match the associated paired variable names above.

The expression below will find the first item on a page that is marked with a style sheet whose name begins with **RUN3**:

[LRH3]

The expression below will find the last item on a page that is marked with a style sheet whose name begins with **RUN3**:

[RRH3]

As an example, the macro:

[LRH0] though [RRH0]

might produce the following substitution on a page:

Pear butter through Plum preserves

Formatting Running Headers and Footers

For some applications, running headers and footers may need to be shortened to only the first few letters of the item. To do this, place a colon and then the maximum number of letters to be shown after the variable name:

[PRH0:3] through [RRH0:3]

Using the previous example, the following would be produced:

Pea through Plu

Master Page Considerations

If you are using an InDesign master page which includes running headers, running footers, or other Sonar Bookends InSeq items, you must make sure that the text boxes on a master page that contain Sonar Bookends InSeq items can be overridden. Failure to do so will keep InSeq from updating the text.

The InDesign help system and manual have information on how to override master pages.

Adornment

Sequence numbers for an object can be as simple or as elaborate as you want by placing text on either side of the variables.

For example, the macro:

Figure [chapter:I].[section].[paragraph+:a]

would generated a sequence number like this:

Figure IV.3.c

The characters **[+:-=]** have to be prefixed with a **** character to appear as text without causing an error:

Section and paragraph \= \[sectN]\[par+N]

would produce something like this:

Section and paragraph = [14].[3]

Forcing a Macro To Be Run First Or Last

If it is important that a macro on a page be run either before all other macros or after all other macros on that page, then prefix the macro with either a “+” or a “-”, respectively. These macros will show the first and last values of “counter” on the page:

+First counter on page [counter]

-Last counter on page [counter]

NOTE: If the last occurrence of a variable on the page has been incremented (by using `[counter+]`, for example), then the value being displayed as the last entry on the page is actually one too high. To fix this problem put a “-” and “+” on either side of the variable. That decrements the variable, then displays it, and finally reincrements it:

`-Last counter on page [-counter+]`

More Sample Macro Operations

Assuming that the following macros were found and evaluated in the specified order, the results are listed on the right.

Macro	Result
<code>[MyCounter=10+]</code>	10
<code>[MyCounter+2]</code>	11
<code>[MyOtherCounter]</code>	1
<code>[MyOtherCounter+] \- [MyCounter+]</code>	1 - 13
<code>[MyOtherCounter+:I] \- [MyCounter+:a]</code>	II - n
<code>[MyName="John Doe"]</code>	John Doe
<code>Member [MyName], [MyCounter]</code>	John Doe, 15
<code>[MyName:6], [MyCounter:i]</code>	John D, xv

Now let’s see how you would handle a sequence number that consists of 3 values: the chapter number as a Roman numeral, a section number in decimal format, and a paragraph number as a letter. The sequence number would be placed in front of each paragraph, generating something like this:

IV.6.c This is the third paragraph in section 6 of chapter 4.

The macro that would be inserted as a destination in front of the first paragraph on the first section of the first chapter would be:

`[chapter:I].[section].[paragraph+:a]`

This macro would create the variables **chapter**, **section**, and **paragraph** and set them to each have a value of 1. After the sequence number is generated, the variable **paragraph** is incremented by one for the next paragraph. This macro would produce a sequence number of **I.1.a**

The same macro would be repeated for each paragraph in the first section and chapter, producing **I.1.b**, **I.1.c**, etc.

In front of the first paragraph in the next section in the same chapter you would put:

[chapter:I].[+section].[paragraph = 1+:a]

This resets **paragraph** to 1, bumps the **section** to 2, and bumps **paragraph** to 2 for the next paragraph, producing **I.2.a**

The rest of the paragraphs in that section would use:

[chapter:I].[section].[paragraph+:a]

producing **I.2.b**, **I.2.c**, etc.

You would use this macro for the first paragraph of the first section of the next chapter:

[+chapter:I].[section = 1].[paragraph = 1+:a]

This bumps **chapter** to 2, sets **section** and **paragraph** to 1, and bumps **paragraph** to 2 for the next paragraph, producing **II.1.a**

For each paragraph in this section and chapter, you would use this macro:

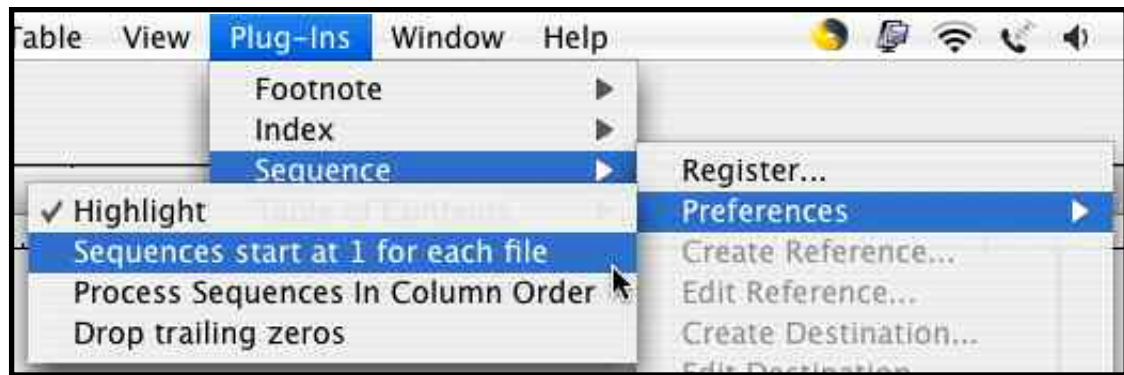
[chapter:I].[section].[paragraph+:a]

producing **II.1.b**, **II.1.c**, etc.

Updating From Earlier Versions

For compatibility with previous version of Sonar Bookends InSeq, there are two special variable names, **TABLE** and **FIGURE**.

These variables work like any other variable, but these variables, and only these variables, can be reset to 1 automatically at the beginning of each file that makes up a document for compatibility reasons. This is done by selecting *Sequences start at 1 for each file* in the *Preferences* as shown in figure 4.1.

*Fig. 4.1*

When opening a document that has references and destinations created with a version of Sonar Bookends InSeq prior to version 5, macros for each destination are created automatically so that the sequence numbers produce exactly the same result if updated under the newer versions of InSeq. (There were no macro capabilities in the early versions of InSeq, only two counters - one for figures and one for tables.)

For figures the following macro text is created for each destination:

[FIGURE+]

For tables the following macro text is created for each destination:

[TABLE+]

Section V Editing/Removing Entries

Existing references and destinations can be easily edited or deleted.

To edit or delete a reference, highlight the desired reference. (The reference can be either “??” or a sequence number, depending on whether the reference is new or has already been resolved, respectively.) Then use *Edit Reference...* as shown in figure 5.1.

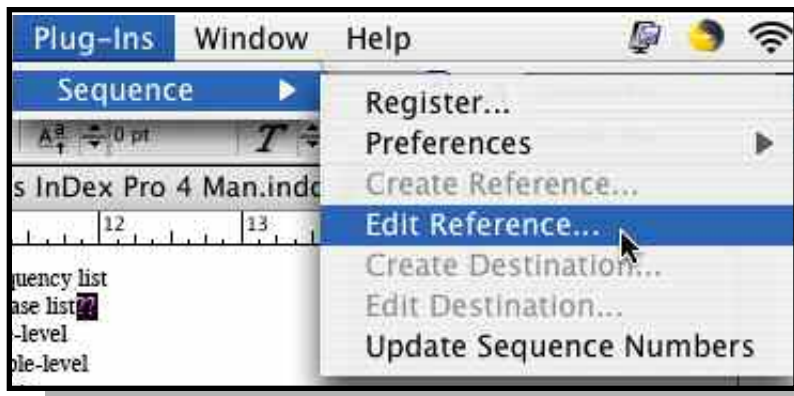


Fig. 5.1

The dialog box in figure 5.2 will then appear to let you edit the label for the selected reference. To delete the reference instead of changing the label, you can optionally check *Delete this entry*. When a reference is deleted, that reference is completely removed from the document.

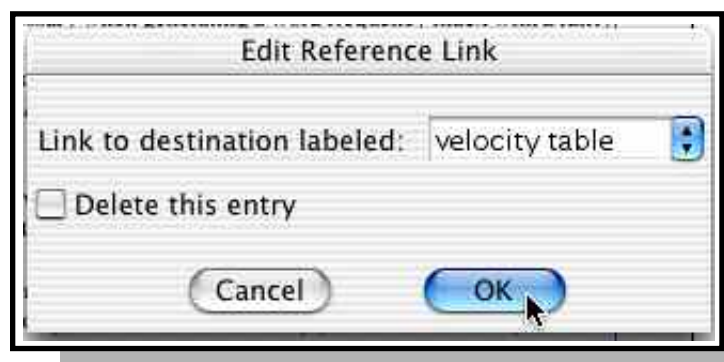


Fig. 5.2

To edit or delete a destination label, select the desired destination. The destination can be either “??” or a sequence number, depending on whether the destination is new or has already been resolved, respectively. Then use *Edit Destination Label...* as shown in figure 5.3.

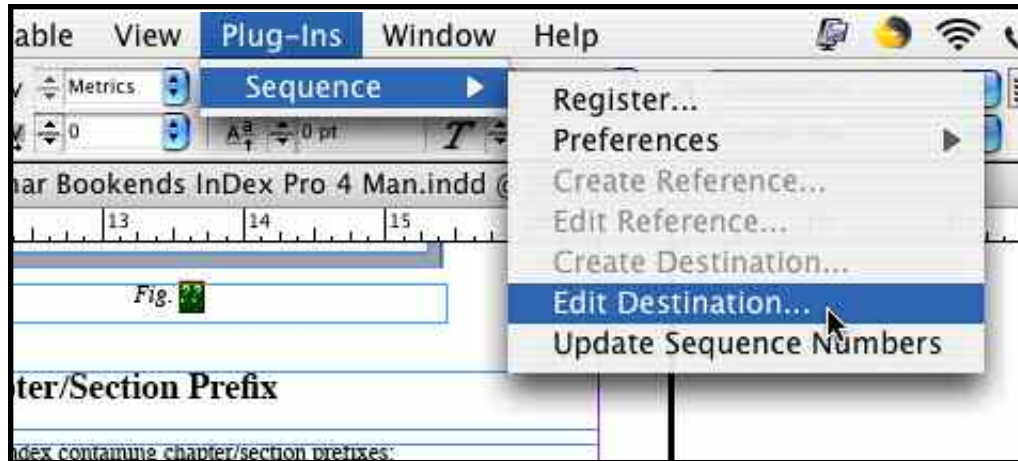


Fig. 5.3

The dialog box in figure 5.4 will then appear to let you edit the label for the selected destination. To delete the destination instead of changing the label, you can optionally check *Delete this entry*. When a destination is deleted, that destination is completely removed from the document.



Fig. 5.4

Section VI Updating Sequence Numbers

Once all references and destinations have been entered or anytime the document has been changed by adding or deleting sequences, open all files or books that make up the document and then select *Update Sequence Numbers* as shown in figure 6.1. The reference and destination sequence numbers are then placed in the document as shown in figure 6.2.

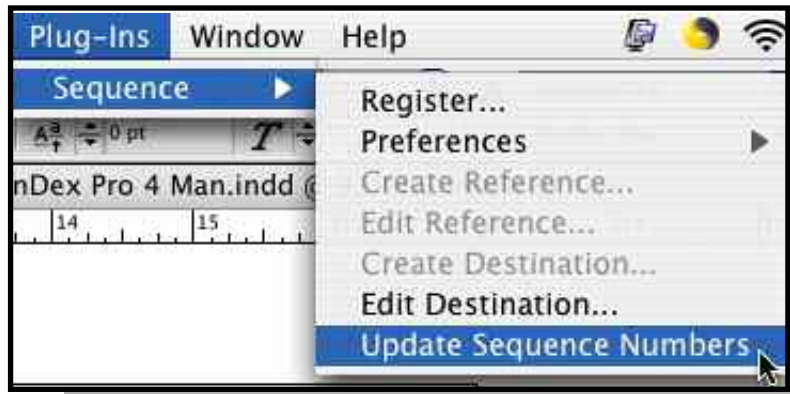


Fig. 6.1

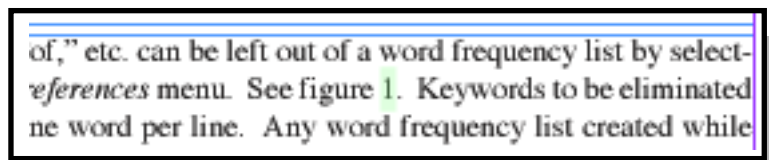


Fig. 6.2

Notice that the substituted sequence numbers remain highlighted in the reference or destination color as appropriate.

Using the InDesign 'Book' Feature

The InDesign “book” feature is supported by Sonar Bookends InSeq. If your document consists of one or more books, you can update the sequence numbers by just opening the book or books and issuing the *Update Sequence Numbers* command. You do not need to open each of the individual files that make up the book or books.

Note: *Files are evaluated in alphabetical order by the file name.* The 4th file in a book is not necessarily going to be the 4th file processed, depending on its name. The easiest way to force a particular order is to prefix each file name with a three digit number representing its position.

Without the leading digits these files would be evaluated backwards, as alphabetically “Chapter 1” would come before “Introduction”:

```
001Introduction
002Chapter 1
```

Dropping Trailing Zeros

Sonar Bookends InSeq has a mechanism to drop trailing zeros from a sequence number. For example, the sequence

```
1.0.0.0
1.1.0.0
1.1.1.0
1.1.1.1
2.0.0.0
2.1.0.1
```

would look like this with trailing zeros dropped:

```
1
1.1
1.1.1
1.1.1.1
2
2.1.0.1
```

To remove trailing zeros from sequences, check *Drop Trailing Zeros* in the *Preferences* menu as show in figure 6.3. The zeros will be dropped when you next update sequence numbers.

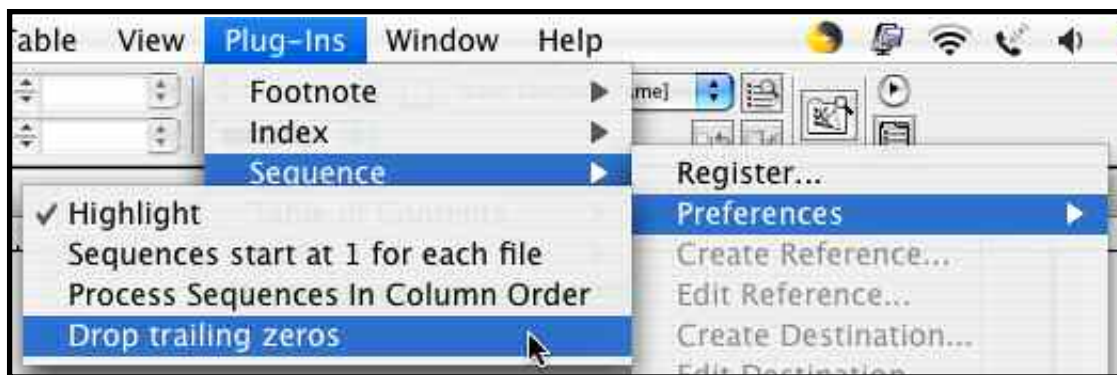


Fig. 6.3

Changing the Sequence Evaluation Order

By default Sonar Bookends InSeq evaluates the destination sequences on a page in order by the column containing the sequence's text box, going from left to right, with each column then evaluated from top to bottom as shown in figure 6.4.

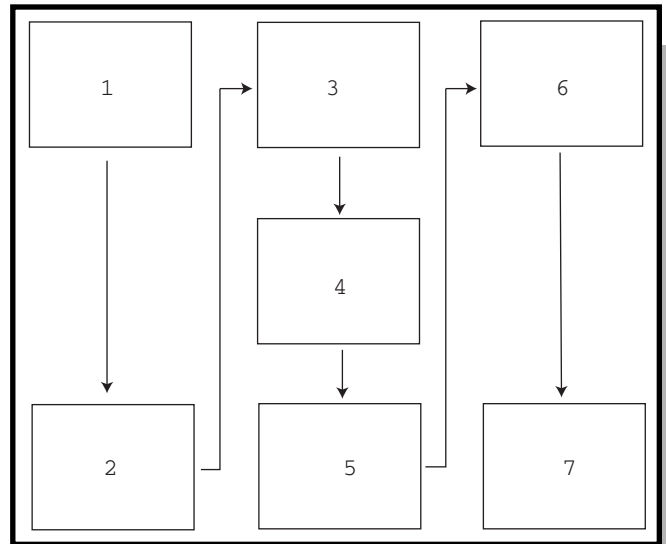


Fig. 6.4

The order can be changed to evaluate sequences by the row containing the sequence's text box, going from top to bottom, with each row then evaluated from left to right as shown in figure 6.5.

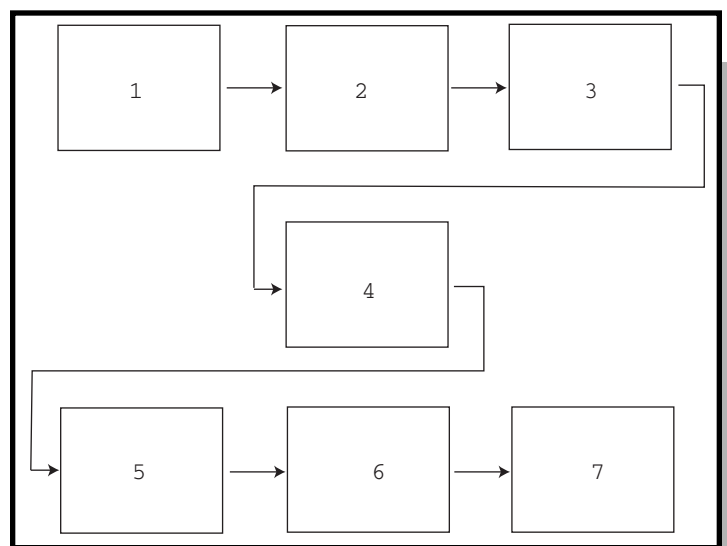


Fig. 6.5

To select the evaluation order, use *Process Sequences in Column Order* in the *Preferences* menu. Refer to figure 6.6.

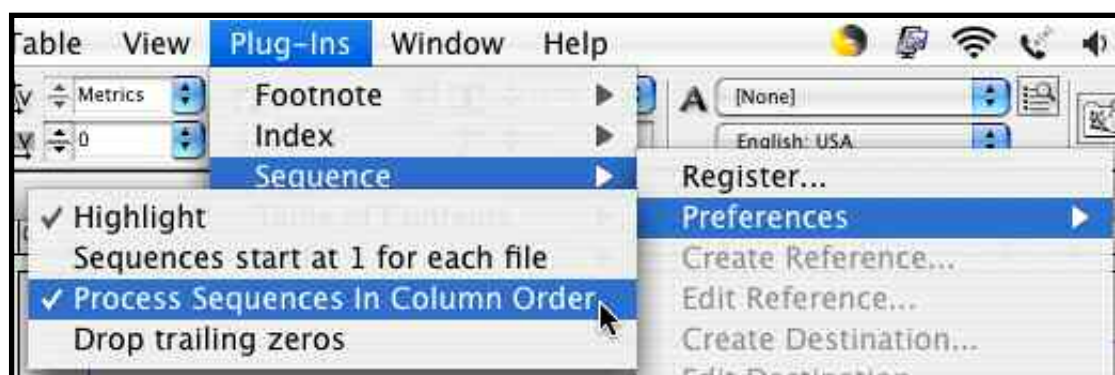


Fig. 6.6

If *Process Sequences in Column Order* is checked, which is the default, sequences are evaluated as shown in figure 6.4. If unchecked, sequences are processed as shown in figure 6.5.

Section VII Error Messages

There are a few error messages that can appear, depending on what operation is being performed.

- **Demo version** - A reminder message that is displayed the first time that Sonar Bookends InSeq is used after running InDesign, if you have not entered a valid serial number previously. Demo modes will only update the sequence numbers for the first five references. When you purchase Sonar Bookends InSeq, you will get a valid serial number to enter into the *Register...* dialog box.
- **Destination label was not found** - When updating the sequence numbers, a matching destination label could not be found for a reference label. The “??” string is inserted for the missing sequence number. Either add/edit the offending destination label or edit/remove the offending reference label.
- **Duplicated destination label (“??” substituted for sequence)** - When updating the sequence numbers, two identical destination labels were found. Edit or remove the duplicate label to resolve this problem. Destination labels should be unique. To help you find the offending duplicate labels, “??” is placed where the sequence number would normally go. Just search for “??” to find the offending sequences and edit them.
- **Duplicate label** - When creating or editing a destination, a label was entered that already exists in another destination.
- **At least one figure/table not referenced** - A destination that was assigned a label is not referenced anywhere. This *warning* message includes the first destination label that was found to not have a reference label associated with it. If all objects should be referenced, check for mislabeling. Otherwise this message can be ignored.
- **Label cannot be empty** - When creating or editing a reference, there must be at least one character in the label field.
- **Macro cannot be empty** - When creating or editing a destination, there must be text in the macro field.
- **Invalid macro** - When creating or editing a destination, there was an error in the macro definition you have supplied.

For any other errors, please contact technical support.

