A Guide to Quark Author Web Edition 2015 - September 2019 Update

2019/12/13

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Getting Started

Smart Documents

A Smart Document is very much like any document. It consists of sections, each with a heading and body content, such as paragraphs, lists, tables, videos and images. What differentiates a Smart Document from other documents are the structure and semantics applied to content. This metadata enables automated processing and dynamic publishing of content. Each section, for example, is of a particular type, which may be unique to a type of document, or common to multiple document types. Similarly, document sections may be authored for a single document, or shared across multiple documents.

Introduction to the Quark Author Web Edition User Guide

The **User's Guide** contains information about Quark Author Web Edition and is intended for end-users. It describes all features and options available in the application and shows you how to use it to easily create and edit rich document content, as well as add media objects like videos and images.

Quark Author Web Edition configuration

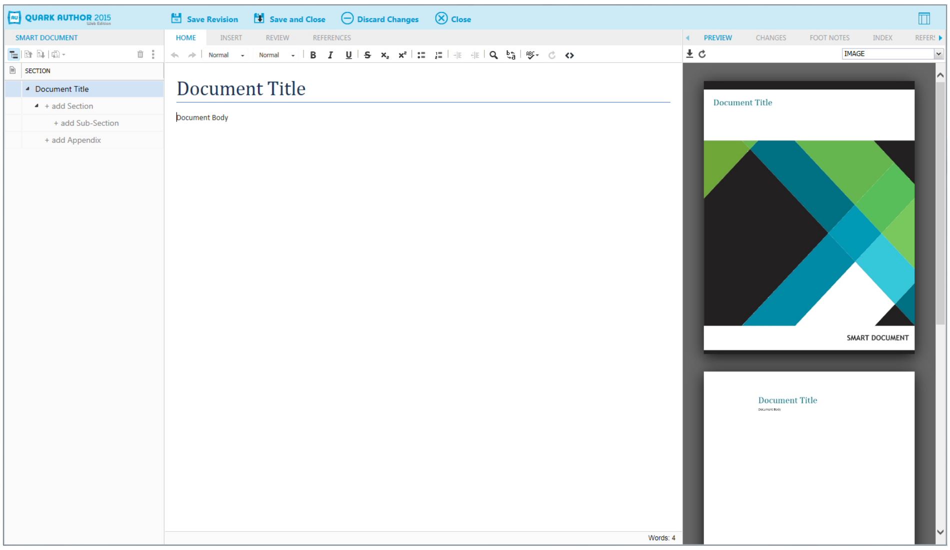
Because Quark Author Web Edition is configurable and extensible, its features can be customized by a developer or a system administrator. Because of this not all functions described in this User's Guide may be available in your Quark Author Web Edition instance and your configuration may have specialized functions not described in this guide.

➡ The Quark Author Web Edition interface can be customized and displayed with a different skin (colors, icons, or size).

The user interface

Quark Author Web Edition provides a clean and simple user interface. If you are familiar with desktop word processors you will find that many commands are familiar or self-explanatory.

The figure below shows the main interface of Quark Author Web Edition:



Quark Author - Web Edition interface

The Quark Author Web Edition user interface consists of the following main parts:

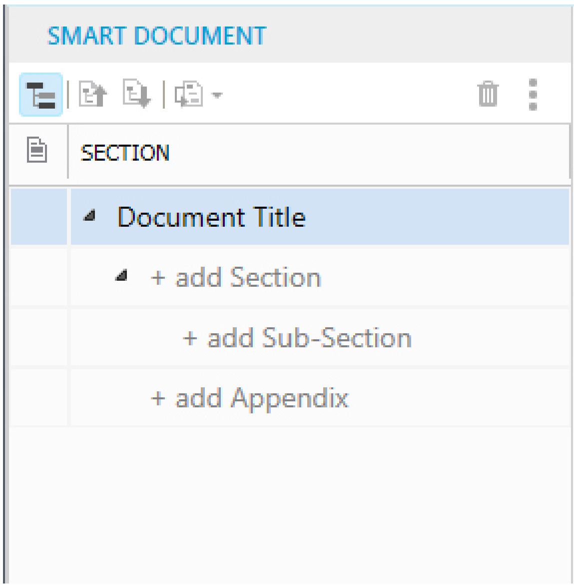
- The banner at the top of the window provides file-level operations, such as **Save** and **Close**. The pane settings button on the far right allows the user to show and hide various task panes.
- The "*Smart Document pane*" - the section to the left of the **Editing** pane containing the tree structure of the document currently being worked on. Use this pane to add and nest sections of the document and to navigate among them.
- The "*Editing pane*" - the space below the **Toolbar** where you edit all document content.
- The "*Right pane*" - the section to the right of the **Editing** pane contains the following tabs:
  - The "*Preview tab*" - where you can see a live preview of the current document in various output formats.

- The "*Changes tab*" - where you can see user comments and tracked changes on the document you are working on.
- The "*Foot Notes tab*" - where you can see all footnotes and endnotes contained in the document.
- The "History tab" - where you can see all revisions of the document.
- The "*Properties tab*" - where you apply and see all metadata associated with your content.
- The "*Index tab*" - where you can insert index terms and see all occurrences of existing index terms contained in the document.
- The "*REFERS TO tab*" - where you can see assets that the selected asset refers to.
- The "*WHERE USED tab*" - where you can see all documents and components that reference the current component.

- "*Context menus*" - a shortcut or drop-down menu that displays the commands available for the element that was right-clicked.
- Various dialog boxes - small pop-up windows that appear when you use some of the editor's functions and are opened by clicking the toolbar buttons.

Smart Document pane

The **Smart Document** pane is located to the left of the editing pane and presents an outline of the document. The **Smart Document** pane provides the ability to navigate, insert, delete, promote, demote, convert and move document sections.



The Smart Document pane

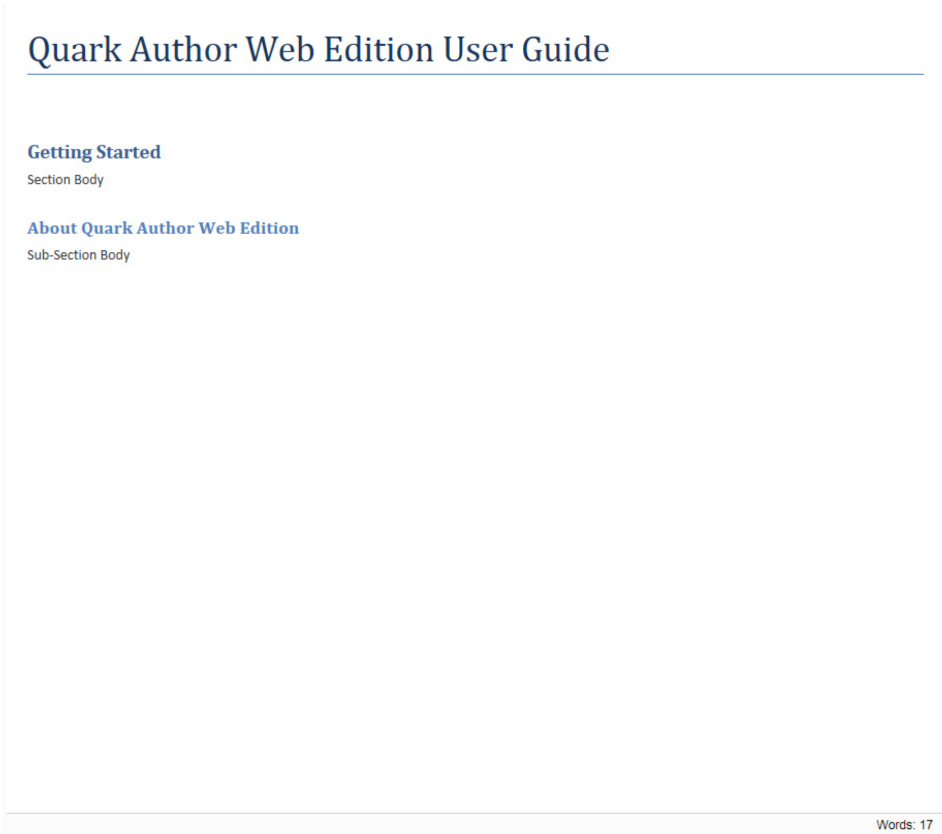
The section under the toolbar is divided into two columns:

- The first column identifies shared components within the document. An icon in this column identifies the root section of a component, and a check mark indicates the component is checked out for edit. All sections in the component are shaded a different color in the section hierarchy.

- The second column presents an outline of the sections in the current document. It allows the user to add and delete sections as needed. Additionally, sections can be reordered by dragging and dropping sections within the tree.

Editing pane

The **Editing** pane is located below the toolbar.



The Editing pane

Use the **Editing** pane to enter the title and contents of each section of your document.

Toolbar

The **Toolbar Ribbon** is the section located at the top of the **Editing** pane. It consists of four tabs containing menu buttons that give you access to various functions of Quark Author Web Edition. Buttons include both simple operations (basic "*Text emphasis*") and more advanced features for providing structure.

The Toolbar Ribbon

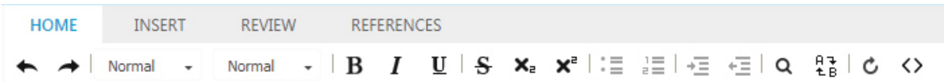
The **Toolbar Ribbon** includes the following tabs:

- **HOME**
- **INSERT**
- **REVIEW**
- **REFERENCES**

➡ To see the name of the function associated with a toolbar button, hover the cursor over that button.

➡ There are many other toolbars that can be displayed, hidden or docked with the preview pane. The **Toolbar Ribbon** groups and tabs are all configurable.

The HOME tab

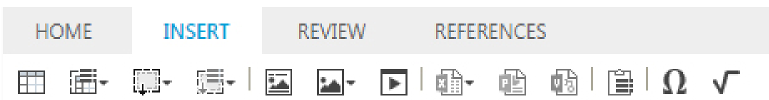


The HOME tab of the Toolbar Ribbon

The **HOME** tab includes the following controls:

- , - Use the **Redo** and **Undo** toolbar buttons to redo and undo the most recent action performed on the document.
- Use the **Para Types** toolbar button to select from the drop-down menu to apply a paragraph style to the selected text.
- Use the **Tag Types** toolbar button to select from the drop-down menu to apply a character style to the selected text.
- , , , - Use to apply **bold**, *italic*, <u>underline</u> and strike-through emphasis to the selected text.
- , - Use to apply superscript and subscript emphasis to the selected text.
- , , , - Use to apply list options (bulleted list, numbered list, increase indent, decrease indent) to the selected text.
- , - Use the **Find** and **Replace** toolbar buttons to search for a word or phrase in the document and replace it.
- - Use the **Refresh** toolbar button to refresh the contents of referred components in the document.
- - Use the **XML** toolbar button to view the document in XML format.

The INSERT tab



The INSERT tab of the Toolbar Ribbon

The **INSERT** tab includes the following controls:

- - Use the **Insert Table** toolbar button to insert a table with the defined number of columns and rows into the document. See “*Inserting tables*“.
- - Use the **Insert Table from Server** toolbar button to insert a smart table into the document. See “*Inserting tables from server*“.
- - Use the **Insert Region** toolbar button to insert a region into the document. See “*Creating a region*“.
- - Use the **Insert Region from Server** toolbar button to insert a saved region into the document. See “*Creating a region*“.
- - Use the **Insert Figure** toolbar button to insert a figure into the document. See “*Inserting a figure*“.
- - Use the **Insert Image** toolbar button to insert an image into the document. See “*Inserting an image*“.
- - Use the **Insert Video** toolbar button to insert a video into the document. See “*Inserting videos*“.
- - Use the **Insert Excel Components** toolbar button to insert components from an Excel spreadsheet. The drop-down menu allows you to choose to insert a Table or a Chart.
- - Use the **Insert PowerPoint** toolbar button to insert a PowerPoint slide into the document. See “*Inserting PowerPoint slides*“.
- - Use the **Insert Visio** toolbar button to insert a Visio page into the document. See “*Inserting Visio pages*“.
- - Use the **Paste from Server** toolbar button to insert the data currently saved on the server clipboard into the document.
- Ω - Use the **Insert Special Character** toolbar button to insert special characters or symbols into the document.
- - Use the **Math editor** toolbar button to insert an equation into the document. See “*Equation editing*“.

➡ This feature is disabled in the default configuration. Configuration changes are required to enable this plugin. See the Quark Author Web Edition System Administration Guide for details on enabling this plugin.

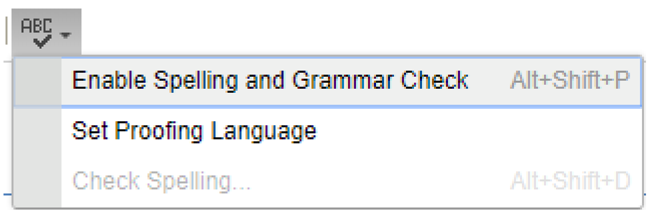
The REVIEW tab

The REVIEW tab of the Toolbar Ribbon

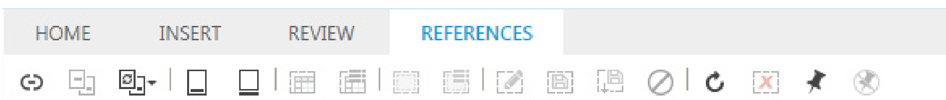
The **REVIEW** tab includes the following controls:

- - Use the **Add Comment** toolbar button to add a comment to the document.

- - Use the **Remove Comment** toolbar button to remove a comment from the document.
- - Use the **Hide All Comments** toolbar button to hide all comments in the document. These comments will still appear in the **CHANGES** tab in the **Right** pane.
- - Use the **Show Previous Comment** toolbar button to go to the previous comment in the document.
- - Use the **Show Next Comment** toolbar button to go to the next comment in the document.
- - Use the **Tracking** toolbar button to enable/disable tracked changes. If you enable/disable tracking in your document, the tracking state will be saved in the `Tracking State` attribute when you save the document.
- - Use the **Highlighting** toolbar button to enable/disable highlighting of tracked changes. If you enable/disable highlighting in your document, the highlighting state will be saved in the `Tracking State` attribute when you save the document.
- - Use the **Next** button to go to the next tracked change in the document.
- - Use the **Previous** toolbar button to go to the previous tracked change in the document.
- - Use the **Accept** toolbar button to accept the current change, accept the current change and automatically move to the next, or to accept all changes in the document.
- - Use the **Reject** toolbar button to reject the current change, reject the current change and move to the next, or to reject all changes in the document.
- - Use the **Spelling and Grammar** toolbar button drop-down menu to select options for proofing your document.



The REFERENCES tab



The REFERENCES tab of the Toolbar Ribbon

The **REFERENCES** tab includes the following controls:

- - Use the **Link** toolbar button to insert a hyperlink into the document.

- - Use the **Insert Cross Reference** toolbar button to insert a cross-reference, pointing to any other Section, Figure or Table inside the document.
- - Use the **Synchronize Cross Reference** toolbar button to synchronize the cross-references in the document.

➡ The **Insert Cross Reference** and the **Synchronize Cross Reference** buttons are only available after you have saved a revision of the document.

- - Use the **Insert Footnote** toolbar button to insert a footnote into the document.
- - Use the **Insert Endnote** toolbar button to insert an endnote into the document.
- - Use the **Create Table Component** toolbar button to create a component from the selected table.
- - Use the **Replace Table from Server** toolbar button to replace the selected table with a table component saved on the server.
- - Use the **Create Region Component** toolbar button to create a component from the selected region.
- - Use the **Replace Region from Server** toolbar button to replace the selected region with a region component saved on the server.
- - Use the **Edit Component** toolbar button to edit the selected component.
- - Use the **Save Component** toolbar button to save the selected component.
- - Use the **Save & Close Component** toolbar button to save and close the selected component.
- - Use the **Discard Changes** toolbar button to discard any changes made to the selected component.
- - Use the **Refresh** toolbar button to refresh the contents of referred components in the document.
- - Use the **Remove Component Reference** toolbar button to remove the selected component reference.
- - Use the **Pin Component Reference** toolbar button to pin the selected component reference.
- - Use the **Unpin Component Reference** toolbar button to unpin the selected component reference.

Dynamic tabs

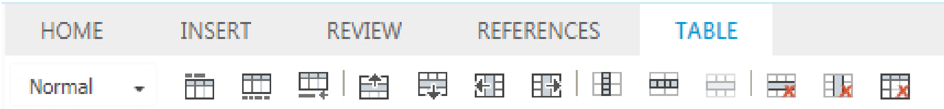
Quark Author Web Edition allows you to configure context based dynamic tabs in the **Toolbar** ribbon. Buttons relevant to the current context are shown under these dynamic tabs. See the *"Dynamic toolbar tabs"* section of the *Quark Author Web Edition System Admin Guide* for details on how to configure your own custom dynamic tabs.

The default configuration of Quark Author Web Edition includes two dynamic tabs:

- *The TABLE tab*
- *The REGION tab*

The TABLE tab

The **TABLE** tab appears on the **Toolbar** ribbon when your cursor is placed inside a table.



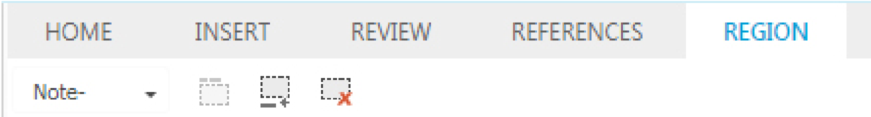
The dynamic TABLE tab of the Toolbar Ribbon

The **Table** tab includes the following controls:

- Use the **Table Types** drop-down list to convert a table to a different type.
- - Use the **Caption** toolbar button to add a caption to the table.
- - Use the **Description** toolbar button to add a description to the table.
- - Use the **Insert Paragraph After** toolbar button to insert a paragraph after the table.
- - Use the **Insert Row Above** toolbar button to insert a row above the selected row.
- - Use the **Insert Row Below** toolbar button to insert a row below the selected row.
- - Use the **Insert Column to the Left** toolbar button to insert a column to the left of the selected column.
- - Use the **Insert Column to the Right** toolbar button to insert a column to the right of the selected column.
- - Use the **Split Cell Horizontally** toolbar button to split the selected cell horizontally.
- - Use the **Split Cell Vertically** toolbar button to split the selected cell vertically.
- - Use the **Merge Cells** toolbar button to merge multiple, selected cells into one cell.
- - Use the **Delete Rows** toolbar button to delete the selected rows.
- - Use the **Delete Columns** toolbar button to delete the selected columns.
- - Use the **Delete Table** toolbar button to delete the entire table.

The REGION tab

The **REGION** tab appears on the **Toolbar** ribbon when your cursor is placed inside a region.



The dynamic REGION tab of the Toolbar Ribbon

The **Region** tab includes the following controls:

- Use the **Region Types** drop-down list to convert a region to a different type.
- - Use the **Region Title** toolbar button to add a title to the region.
- - Use the **Insert Paragraph After** toolbar button to insert a paragraph after the region. This is useful when you wish to add content outside the current region.
- - Use the **Remove Region** toolbar button to remove the region. Removing a region does not delete the content.

Right pane

The screen area to the right of the **Editing** pane contains the following tabs:

- The "*Preview tab*" - where you can see a live preview of the current document in various output formats.
- The "*Changes tab*" - where you can see user comments and tracked changes on the document you are working on.
- The "*Foot Notes tab*" - where you can see all the footnotes and endnotes contained in the document.
- The "History tab" - where you can see all revisions of the document.
- The "*Properties tab*" - where you apply and see all the metadata associated with your content.
- The "*Index tab*" - where you can see a list of all index terms and their associated occurrences. Use this tab to insert new index terms and add new occurrences to existing index terms.
- The "*REFERS TO tab*" - where you can see assets that the selected asset refers to.
- The "*WHERE USED tab*" - where you can see all documents and components that reference the current component.

Use the **Pane Settings** button in the upper, far right corner to hide/display the various tabs.

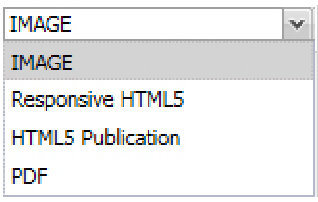
Preview tab

The **PREVIEW** tab allows you to preview the current document in multiple output formats like PDF, HTML5 Publication, and Responsive HTML5. This is where you preview the appearance of the final document.

The PREVIEW tab

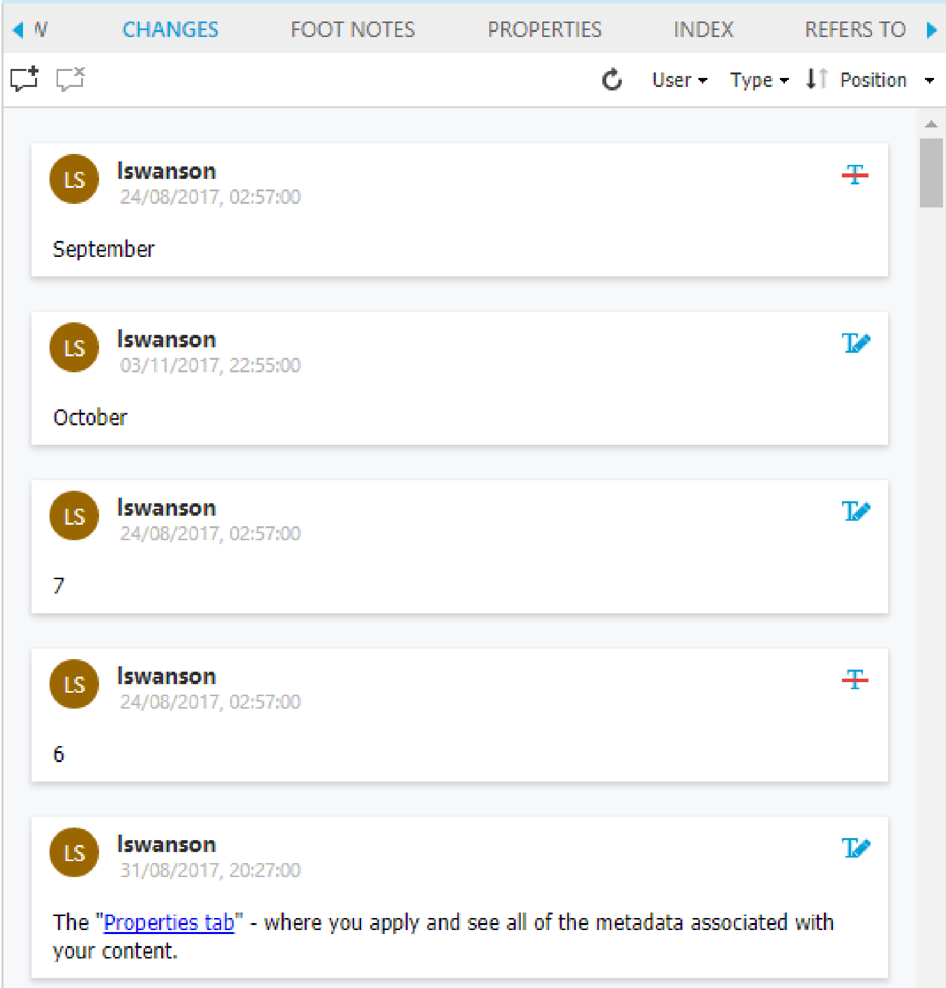
The **PREVIEW** tab toolbar includes the following controls:

- - Use the **Download** toolbar button to save a copy of the document.
- - Use the **Refresh** toolbar button to refresh the preview document with the latest content in the **Editing** pane.
- Use the drop-down list to select the preview format.



Changes tab

The **CHANGES** tab allows you to see a list of all comments and tracked changes that have been added to the current document.



The CHANGES tab

The **CHANGES** tab toolbar includes the following controls:

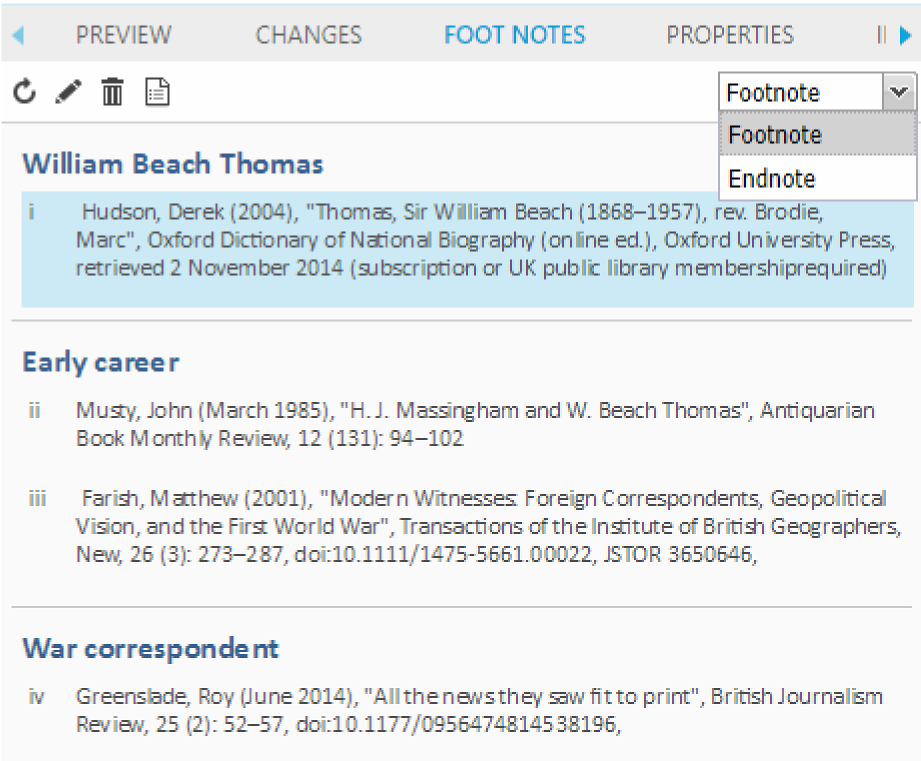
- - Use the **Add Comment** toolbar button to insert a comment in the document.
- - Use the **Delete Comment** toolbar button to delete the currently selected comment.
- - Use the **Refresh** toolbar button to see recent comments or tracked changes.
- User - Use the **User** toolbar button to filter by specific users. Filtering by user impacts what comments are visible in both the **CHANGES** tab and on the editing canvas.
- Type - Use the **Type** toolbar button to filter by type (comments, insertions, deletions). Filtering comments by type only impacts the CHANGES tab and does not impact what comments are visible on the editing canvas.
- Position - Use the **Position** toolbar button to sort the list by position in the authoring canvas in ascending or descending order. When the list is sorted by position, the items in the **CHANGES** tab auto-scroll to match the cursor position in the editing canvas.

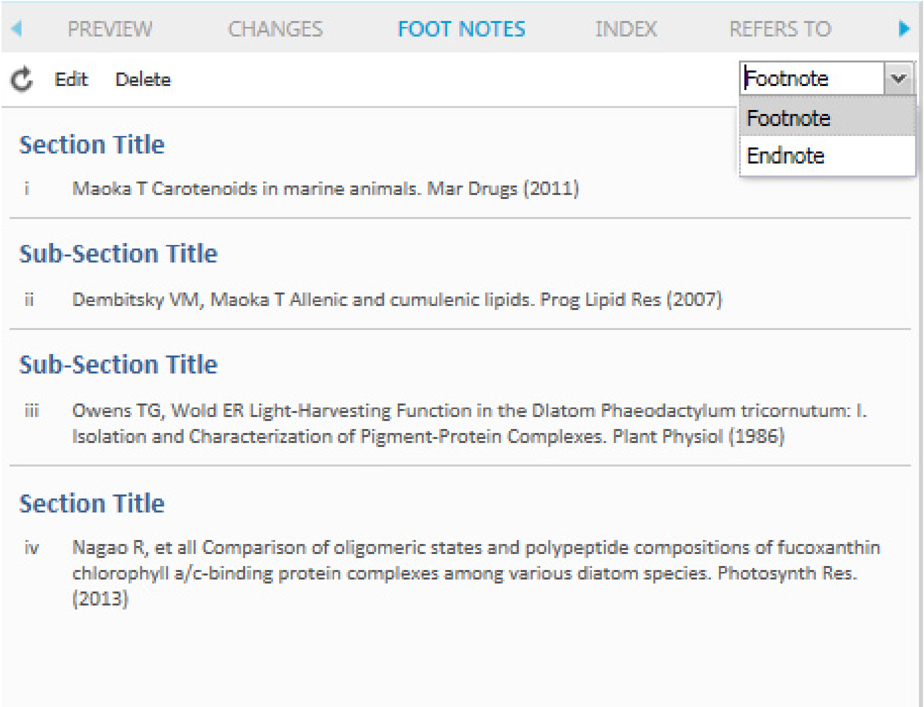
- Date - Use the **Date** toolbar button to sort the list by **Date** in ascending or descending order. When the list is sorted by date, the items in the **CHANGES** tab do not auto-scroll to match the cursor position in the editing canvas.

➡ Use the **Accept** and **Reject** icons to accept or reject the proposed change from the **CHANGES** tab.

Foot Notes tab

The **FOOT NOTES** tab displays all the footnotes and endnotes contained in the document.





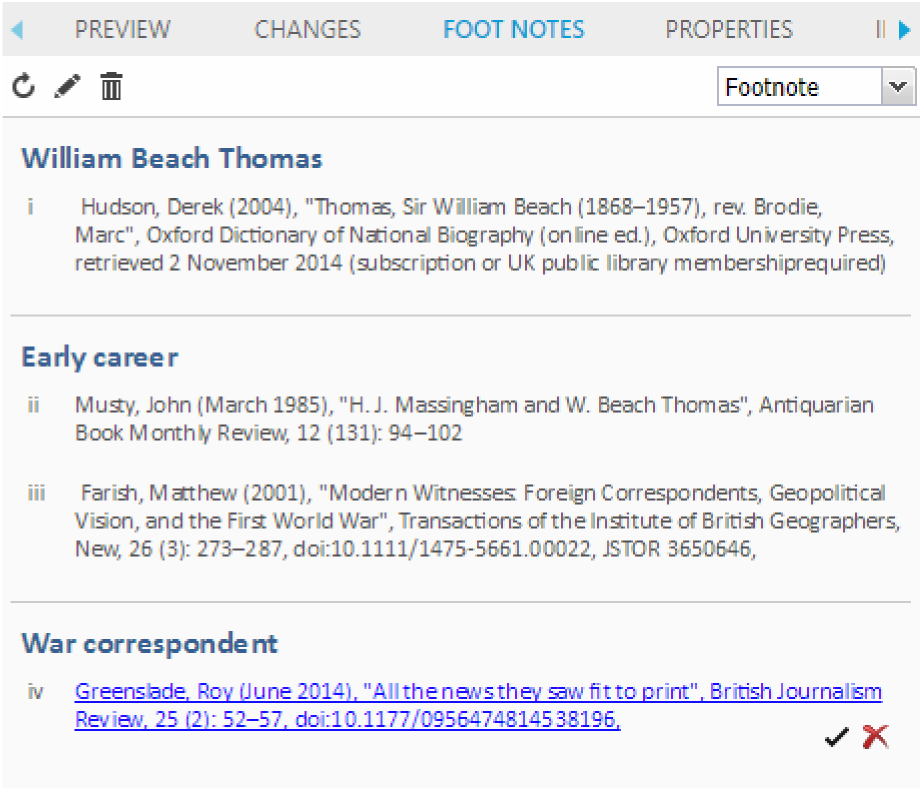
The FOOT NOTES tab

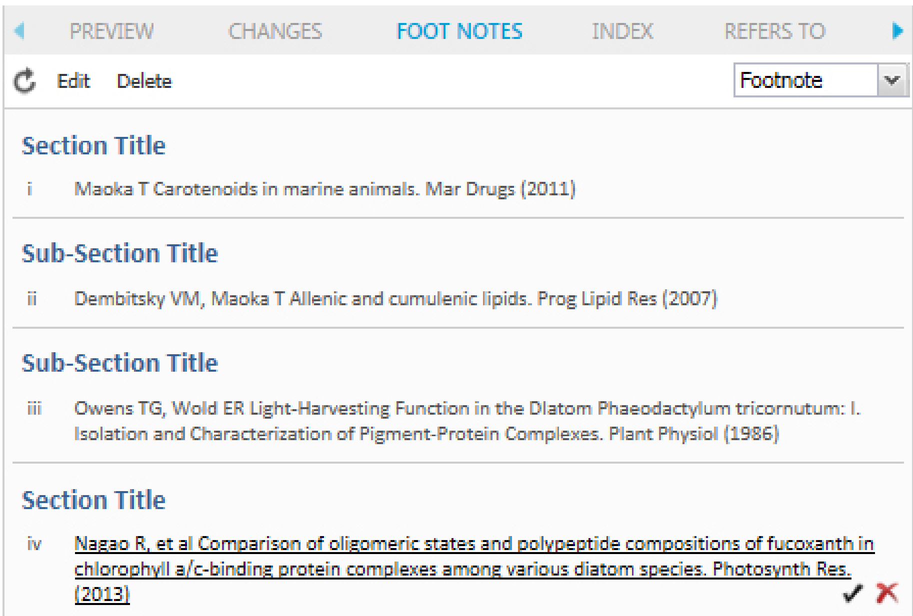
The **FOOT NOTES** tab toolbar includes the following controls:

- - Use the **Refresh** toolbar button to refresh the list to include any recent footnotes or endnotes.
- - Use the **Edit** toolbar button to edit the selected footnote or endnote.
- - Use the **Delete** toolbar button to delete the selected footnote or endnote.
- - Use the **Edit Properties** toolbar button to edit the metadata of the selected footnote or endnote.
- Use the drop-down menu to filter the list by type (footnotes or endnotes).

If you click on a footnote or endnote from the list, the footnote or endnote location in the document will be highlighted. When you select a footnote or endnote on the editing canvas, this footnote or endnote is selected on the **FOOT NOTES** tab.

If you insert a footnote or endnote when tracking is on, then the footnote/endnote in the list has additional options.

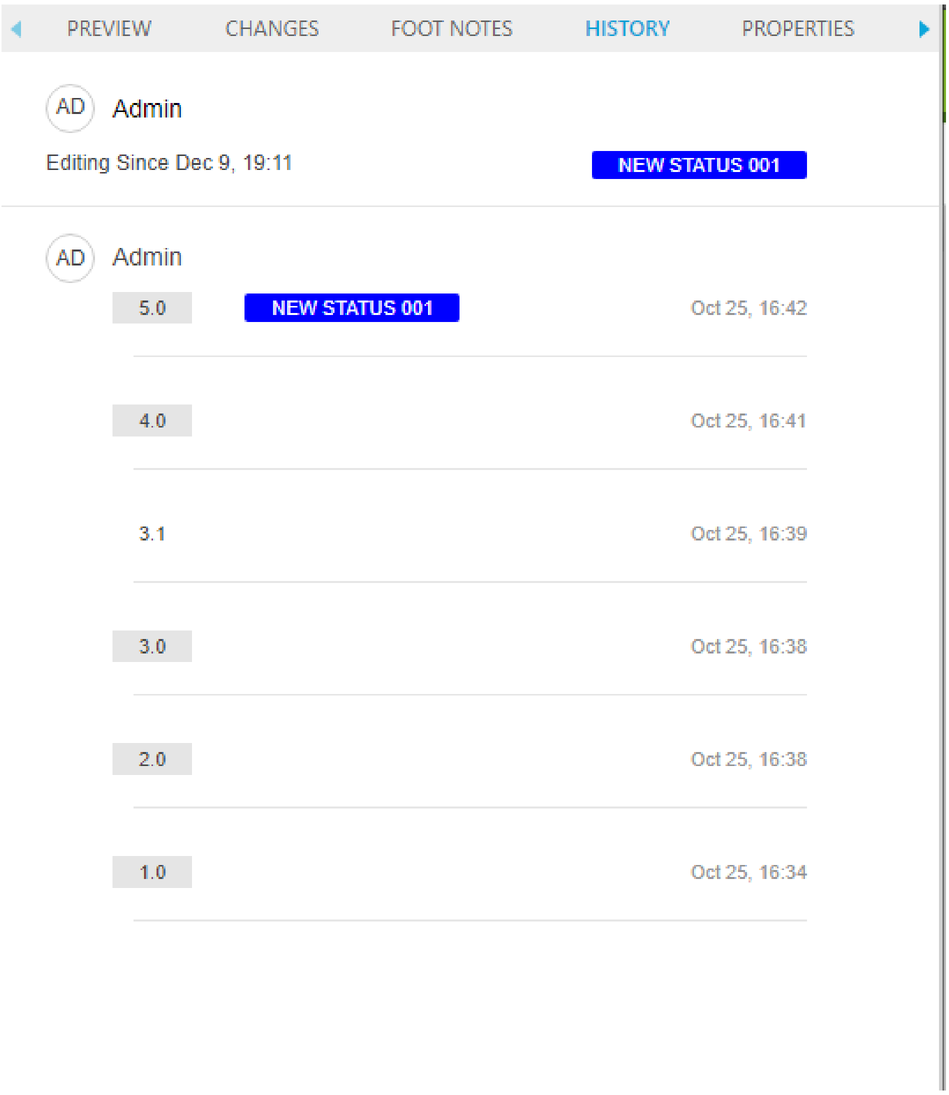




You can use these options to **Accept** or **Reject** the inserted footnote/endnote.

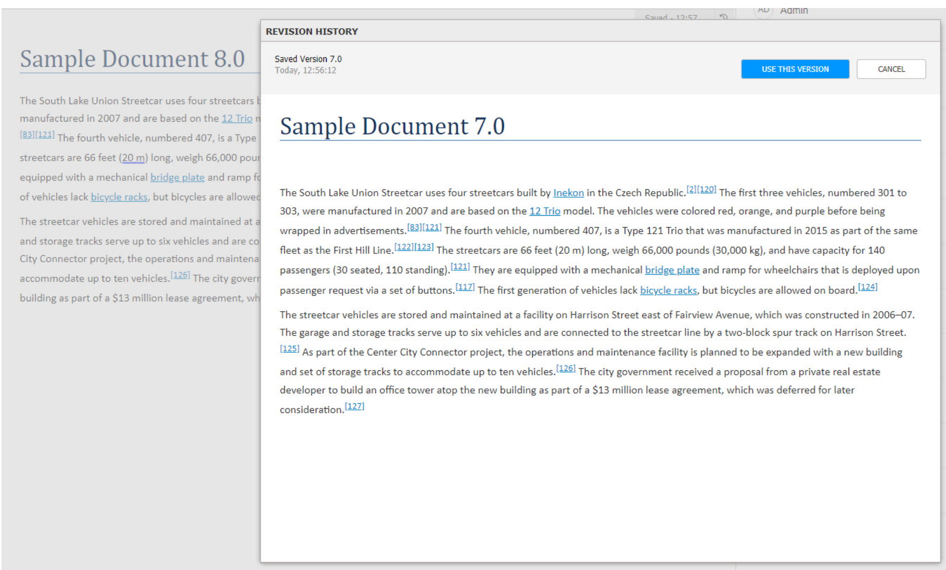
History tab

The History tab shows revision details and timeline of all revisions.



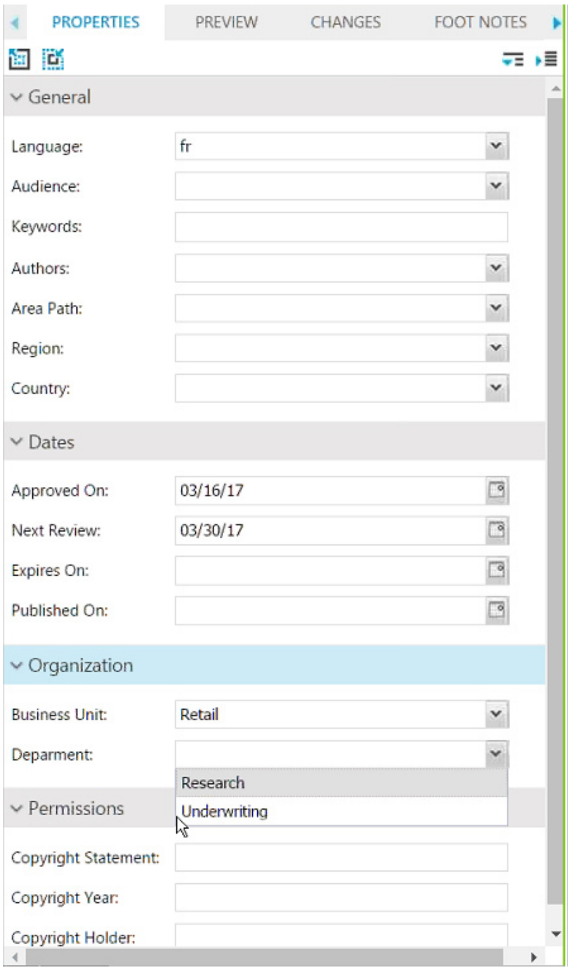
This tab includes version number, date-time, revision comments and creator of all revisions of document.

You can see content of the document from previous revisions as a read-only view and use that revision as well.



Properties tab

The **PROPERTIES** tab displays metadata associated with your content.



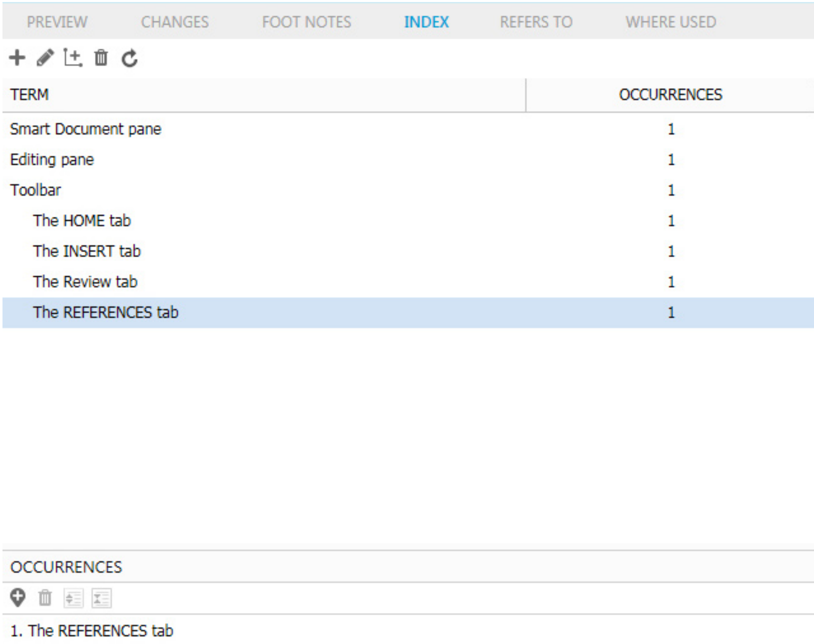
The PROPERTIES tab

The **PROPERTIES** tab toolbar includes the following controls:

- - Click the **Increase Scope** button to broaden the content scope associated with the displayed metadata.
- - Click the **Decrease Scope** button to narrow the content scope associated with the displayed metadata.
- - Click the **Expand All** button to expand all of the metadata controls.
- - Click the **Collapse All** button to collapse all of the metadata controls.

Index tab

The **INDEX** tab provides features for producing a generated index of terms. This tab displays a list of all index terms and their associated occurrences. Use this tab to insert new index terms and add new occurrences to existing index terms.



The INDEX tab

The upper section of the **INDEX** tab lists the index terms in the document.

The **Occurrences** section of the **INDEX** tab lists all occurrences of the selected index term.

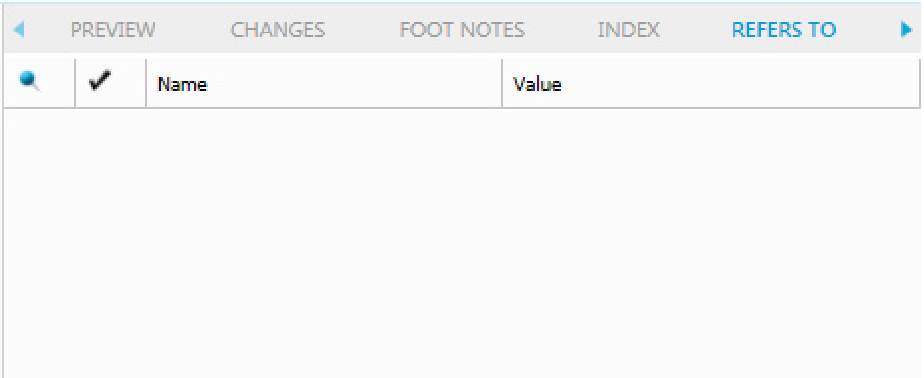
See "*Indexes*" for more information about using this tab to manage indexes.

The Refers To and Where Used tabs

The **REFERS TO** and **WHERE USED** tabs allow you to view the relationships (including primary and secondary references, if any) for the selected asset. The current document **Refers To** assets (images and components). These are primary, or first-level references. These referred to assets may **Refer To** other assets. These are secondary, or second-level references.

REFERS TO tab

The **REFERS TO** tab displays all assets that the selected asset refers to.



The REFERS TO tab

The **REFERS TO** tab includes the following columns:

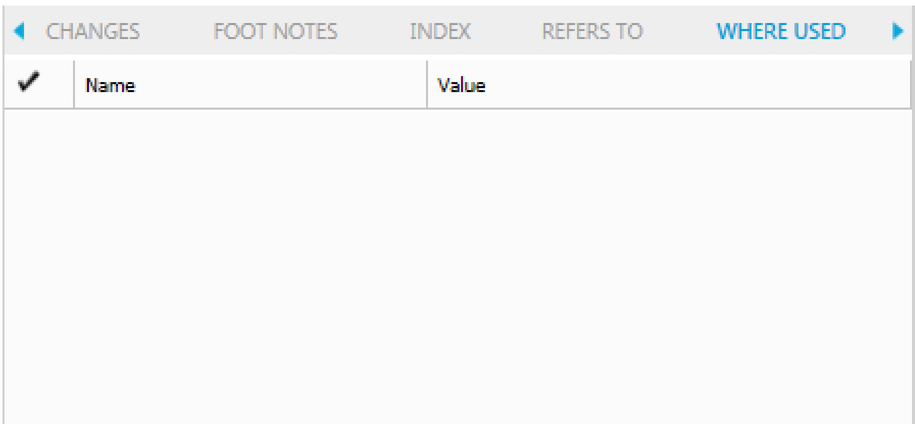
- - The **Pinned Version** column is used to indicate if a referenced asset is pinned to a specific version of that asset. The tooltip will show the version that the reference is pinned to.
- - The **Checked Out** column is used to indicate if the referenced asset is currently checked out.
- The **Name** column gives the name of the referenced asset.

When you double-click an asset in this tab, an XPath is displayed below the asset name. The **Value** column contains the XPath location within the current document where the asset is referenced.

WHERE USED tab

The **WHERE USED** tab allows you to see all documents and components that reference the current component.

This tab is only applicable when opening a content type that can be included within another content type. With our default configuration, when opening a Smart Section, the **WHERE USED** tab lists all Smart Documents that include the section.



The WHERE USED tab

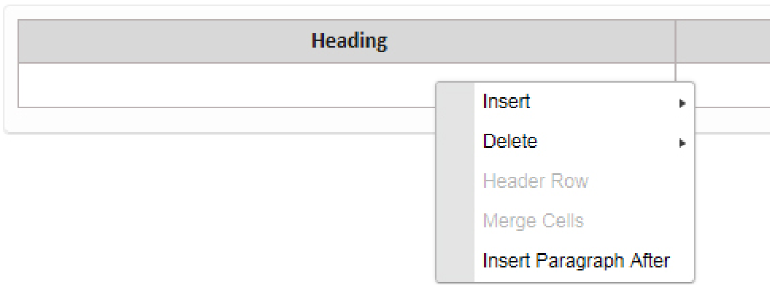
The **WHERE USED** tab includes the following columns:

- - The **Checked Out** column is used to indicate if the parent asset is currently checked out.
- The **Name** column gives the name of the parent asset.
- The **Value** column contains the XPath location within the parent document where the current component is referenced.

Context menus

Context menus are pop-up menus that appear whenever you right-click anywhere in the application. It serves as a shortcut for most common operations available for a given type of object.

The menu is context-sensitive which means that the options displayed in it depend on the object that you click. If, for example, you right-click while inside a table, you will see table-specific options available in its context menu.



A table context menu

For more complex objects, like tables, the context menu might include sub-menus with further options.

Working with documents

Creating documents

New documents are created in the Quark Publishing Platform Client workspace. To create a new document, click **New** and choose **Smart Document from Server Template**, **Smart Section** or **Smart Document** from the drop-down menu. Quark Author Web Edition launches and the new document displays.

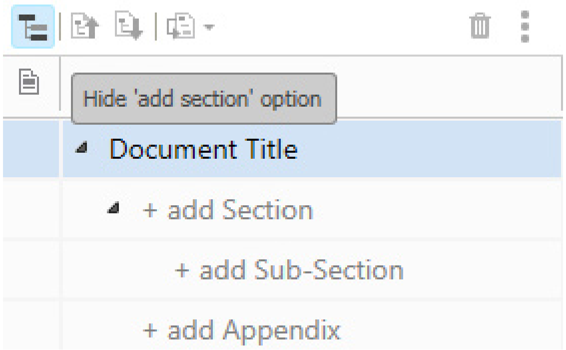
Editing documents

Existing documents are opened in the Quark Publishing Platform Client workspace. To open an existing document for editing, navigate to the repository folder containing the document to be edited. Right + click the document and choose **Check Out.** Quark Author launches and the selected document displays.

Document sections

Use the **Smart Document** pane to build the structure of the document by adding and nesting the document sections. Each document section consists of a **Title** and **Contents**.

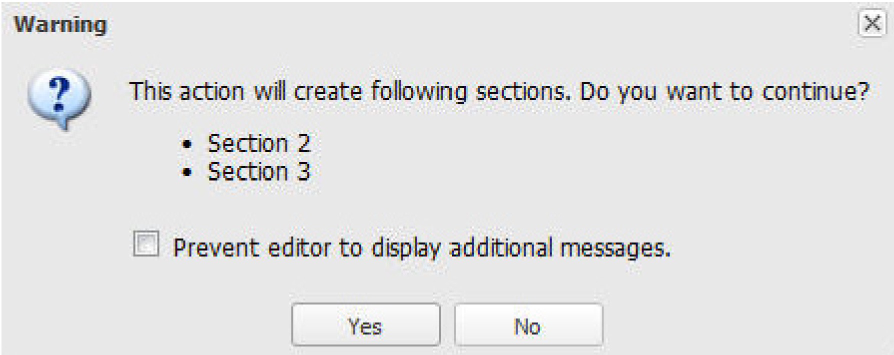
The user can select to show or hide the **Add Section** option in the **Smart Document** pane. By default, the **Add Section** option is shown for new documents and hidden for checked out documents.



To add a section or sub-section, click **+ add Section**, or **+ add Sub-Section**, enter the title name and add your content.

Continue adding sections and sub-sections until you have built the document structure you desire.

➡ If you attempt to add a *Sub-Section* before you have a *Section*, the editor will automatically offer to create the missing sections for you:



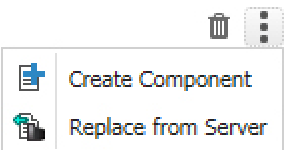
➡ Many of these controls are also presented in a context menu when you right-click a section in the tree.

Reorganizing the document

Edit the structure of the document in the following ways:

- Move sections to a different location in the document by dragging and dropping them into the desired location.
- Use the **Promote** button to promote the currently selected section of the document.
- Use the **Demote** button to demote the currently selected section of the document.
- Use the **Convert To** button to change the semantic type of the selected section.
- Use the **Insert Before** button to insert a section before a section
- Use the **Insert After** button to insert a section after a section
- Use the **Delete** button to delete the currently selected component from the document.

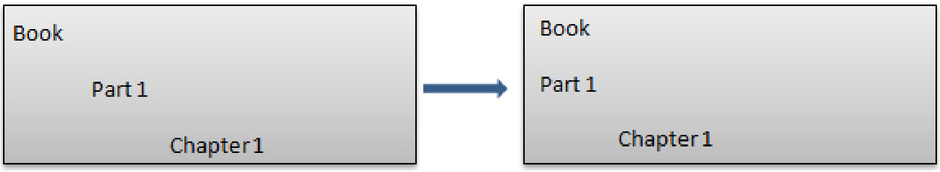
➡ Use the **Options** button to display a drop-down menu of options available for the currently selected section of the document.



Promoting Sections

The **Promote** feature allows you to promote a section of your document to a higher level. The content of the section remains unchanged, only the type and level change.

If you promote a section that has sub-sections, these sub-sections are also promoted. For example, promoting **Part 1**:

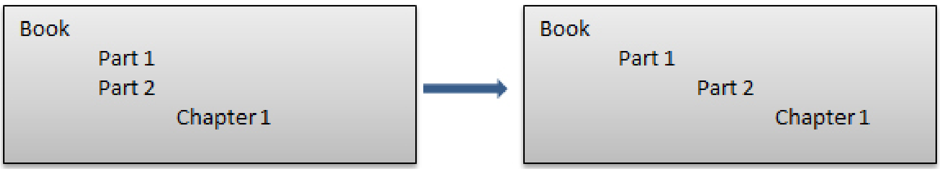


➡ You cannot promote a section that is at the highest level of your content model. In this case the **Promote** button will be unavailable.

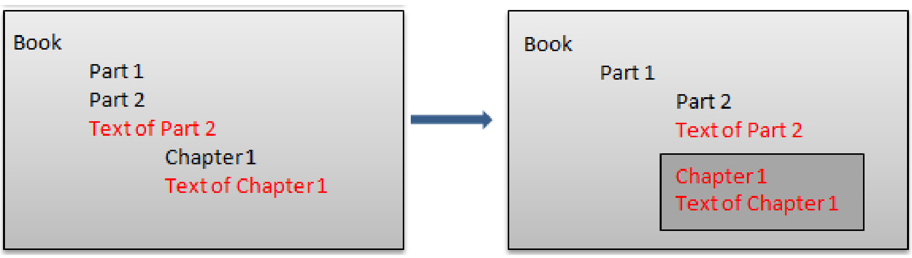
Demoting Sections

The **Demote** feature allows you to demote sections of your document to a lower level. The demoted section will be converted to a sub-section of the previous section. The content of the section remains unchanged, only the type and level change.

If you demote a section that has sub-sections, these sub-sections are also demoted. For example, demoting **Part 2** to a chapter changes **Chapter 1** into a section:



➡ If you demote a section to the lowest level of your content model and it contains sub-sections, the content of these sub-sections will change to regions. These generic regions appear in the **Para Styles** drop-down menu with the new type *Region*.

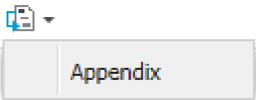


➡ To reverse the process, you can use **Undo** to return to the original structure. Regions may not be promoted.

➡ You cannot demote a section that is already at the lowest level of your content model. In this case the **Demote** button will be unavailable.

Converting Sections

The **Convert To** feature allows you to change section types from one to another. Selecting **Convert To** will display a drop-down list of the allowed types available for the currently selected section.



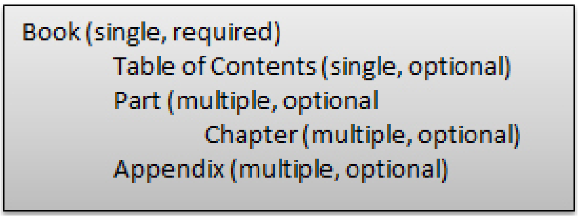
Similar to demote, converting a section which includes sub-sections to another type can produce a situation where the sub-sections have no equivalent structure. In such cases, your content is preserved in the generic region type called *Region*. Any content contained in the section will be maintained if the target structure does not match the source structure. You can use **Undo** to reverse the process, if needed.

The system adheres to the following rules when converting sections:

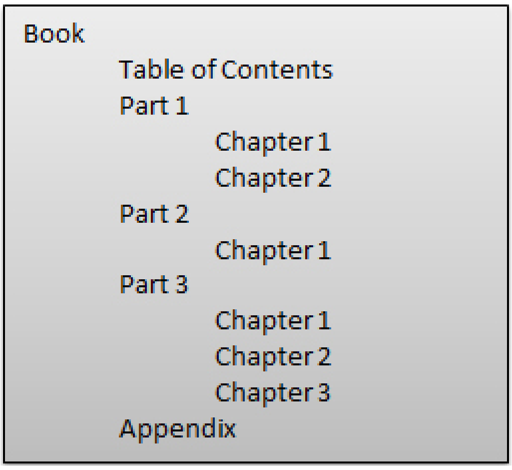
- Preserve the existing hierarchy after the conversion.
- Only allow conversion to valid section types at the same level.
- Do not move content around.
- Do not allow conversion of single, required sections.
- Do not allow conversion of referenced sections.

If converting a section will violate one of these rules, the **Convert To** option will not appear on the context menu and the **Convert To** button will appear grayed out. The list of allowed types that the currently selected section can be converted to will be restricted to those types that will not violate any of these rules.

Given the following content model:


Book (single, required)
Table of Contents (single, optional)
Part (multiple, optional
Chapter (multiple, optional)
Appendix (multiple, optional)

and the following hierarchy:

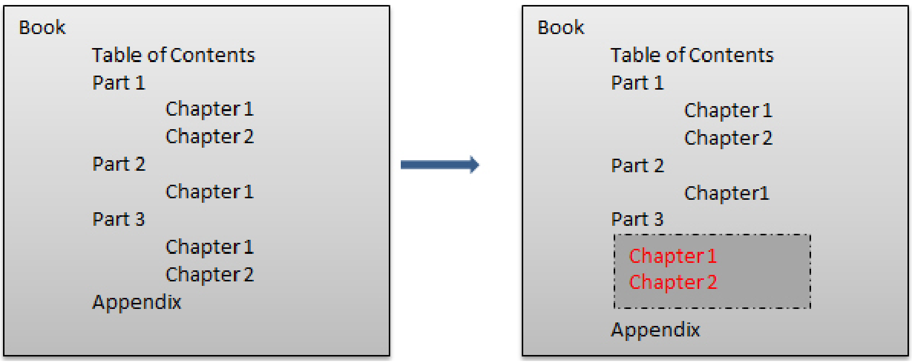


the rules prevent the following conversions:

- Conversion of **Part 1** to a *Chapter* type as this would violate the second rule allowing conversion only between types at the same level.
- Conversion of **Part 1** to an *Appendix* type as this would violate the third rule about moving content. If you want to convert **Part 1** to the *Appendix* type, you would first need to move that section to the end of the series of parts, immediately preceding the existing **Appendix** section.
- Any conversion of **Book** as this would violate the fourth rule of not allowing conversions of single, required sections.

If you convert a section that has sub-sections, these sub-sections will also be converted, maintaining the hierarchy.

If you convert a section that contains sub-sections to a type that does not allow sub-sections, the content of these sub-sections become regions. These generic regions appear in the **Para Styles** drop-down menu with the new type *Region*.



In this example, **Part 3**, containing sub-sections **Chapter 1** and **Chapter 2**, was converted to the *Appendix* type, which does not allow for subsections. You can use **Undo** to reverse the process, if needed.

You may not use **Convert To** on a referenced section type. That's because you first need to check out the referenced component, just like you do if you want to edit the text.

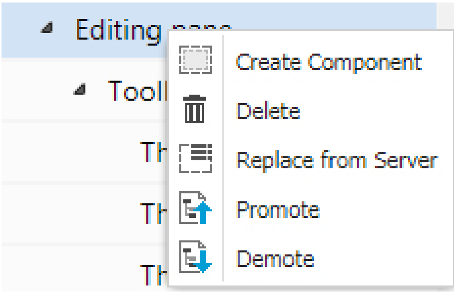
Components

The Components feature provides support for content reuse by allowing you to create reusable components from existing content and easily insert them into any number of documents.

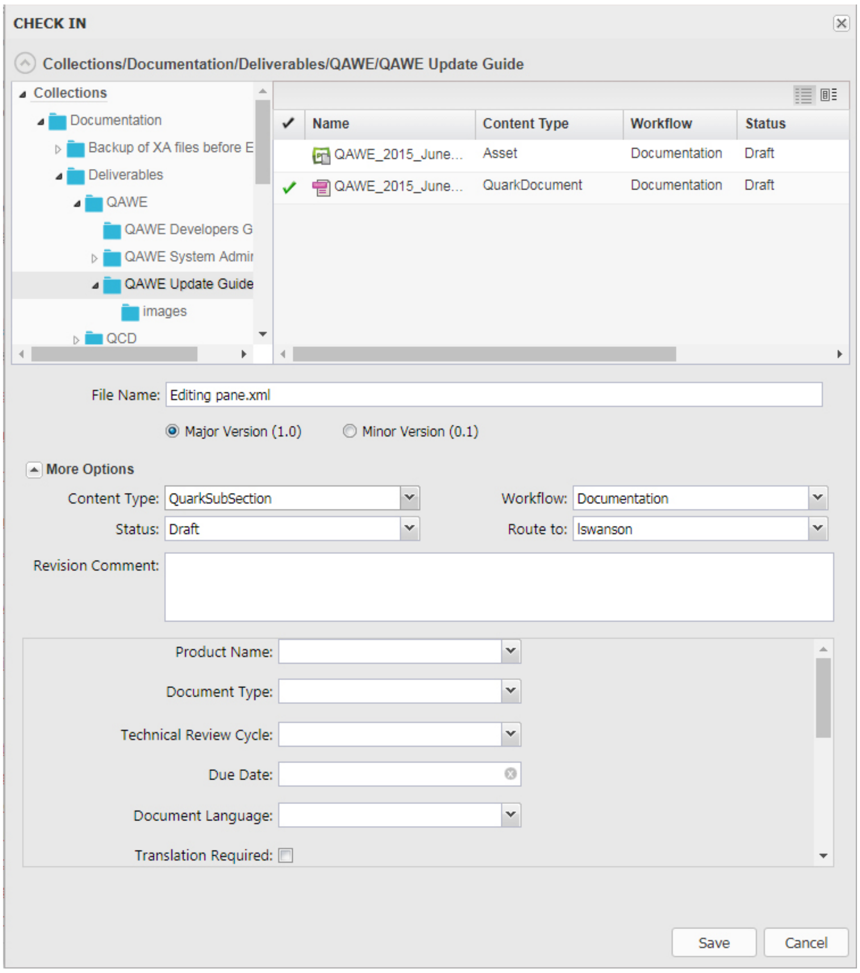
Creating a component

To create a component:

1. In the **Smart Document** pane, right-click on the section you want to make into a reusable component.



2. Choose **Create Component** from the context menu. The **CHECK IN** dialog box displays.



3. Specify a file name and location for the component.

4. Fill out the remaining fields with the appropriate data and click **Save**.

➡ The content will be saved as a separate .xml file in the specified location. Any content in sub-sections of the selected section will be included. You now have a reusable component that you can include in other smart documents by using the **Create from Server** or **Replace from Server** context menu options.

Inserting a component

To insert a previously saved component into your smart document:

- If the component will be an entirely new section:
  1. Show the **Add Section** option in the **Smart Document** pane.
  2. Right click on the **+ add Section** where you want to place the component and choose **Create from Server**. The **Select** dialog box displays.
  3. Search or Navigate to locate the component.
  4. Select the component and click **OK**.
- If the component will replace an existing section:
  1. Right-click the section to replace and choose **Replace from Server**. The **Select** dialog box displays.
  2. Search or Navigate to locate the component.
  3. Select the component and click **OK**.

Editing a component

To edit source content in a component, the component must be open for editing. The **Smart Document** pane uses two icons to indicate editing status for a component:

- - A check mark indicates the component is checked out and available to edit.
- - A component icon indicates the section is a component and is not available for editing.

If the component is not open for editing, right-click on the component and choose **Edit** from the context menu. You will now be allowed to edit the content.

When you have finished editing, right-click on the component and choose:

- **Save** to save your changes and leave the component open for editing.
- **Save and Close** to save the changes and lock the component from editing.
- **Discard Changes** to discard any changes and return the component to its last saved state.

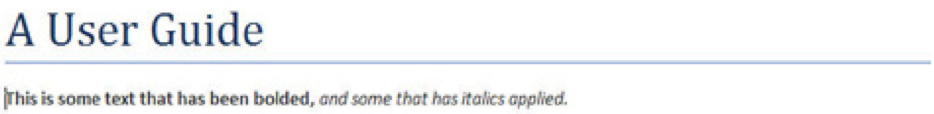
Tables and Regions can also be saved as components. See "*Content components*".

Entering text

Use the **Editing** pane to add content to the document.

As you type, the text, all formatting applied using the toolbar buttons as well as all inserted media appear immediately in the **Editing** pane. If the document contents span beyond the limits of the editing area, a standard scroll bar will appear.

The edited text looks as similar as possible to the results end users will see after the document gets published. When you format your text using the editor features, the formatting can be immediately seen in the **Editing** pane.



Track changes

This feature enables multiple people to collaborate on a document. Approved reviewers across the organization may directly provide comments, deletions, and insertions.

During the review process, each user's changes are visually tracked and may be accepted or rejected. While collaborating on a document, color helps associate comments and changes entered by different users. Each user's comments and insertions have a different color which appears as the background color in the **Editing** pane as well as in the **Changes** tab on the **Right** pane. The color palette is configurable.

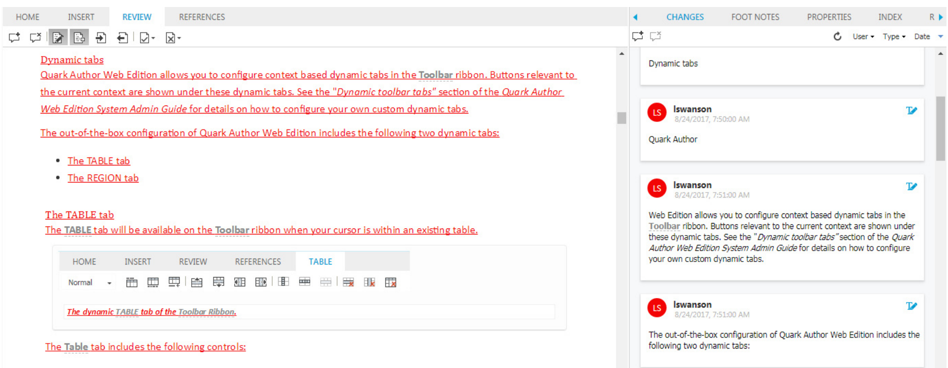
To track changes in your document, click the **Tracking** toolbar button on the **REVIEW** tab. Use the **Highlighting** toolbar button on the **REVIEW** tab to enable or disable highlighting of tracked changes.

If you enable/disable highlighting and tracking in your document, the latest highlighting and tracking state will be saved along with the document.

You can see a list off all tracked changes in the **CHANGES** tab.

Comments and tracked text preview

Use the **CHANGES** tab on the right pane to see a list of all comments and tracked changes that have been added to the current document.

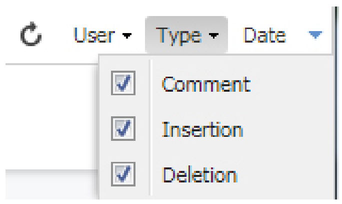


Comments and tracked changes in the **Editing** pane are immediately reflected in the **CHANGES** tab. Clicking into or selecting a tracked change or comment on the editing canvas highlights that comment or tracked change in the **CHANGES** tab.

If another user has a document checked out for commenting or review and you have the same document open as read-only, you can click the **Refresh** button on the **CHANGES** tab to refresh the list with any changes that may have been added or updated.

- - Use the **Add Comment** toolbar button to insert a comment on selected document content.
- - Use the **Delete Comment** toolbar button to delete the currently selected comment.
- - Use the **Refresh** toolbar button to see recent comments or tracked changes.
- User - Use the **User** toolbar button to filter by specific users.

- Type - Use the **Type** toolbar button to filter by type (comments, insertions, deletions).

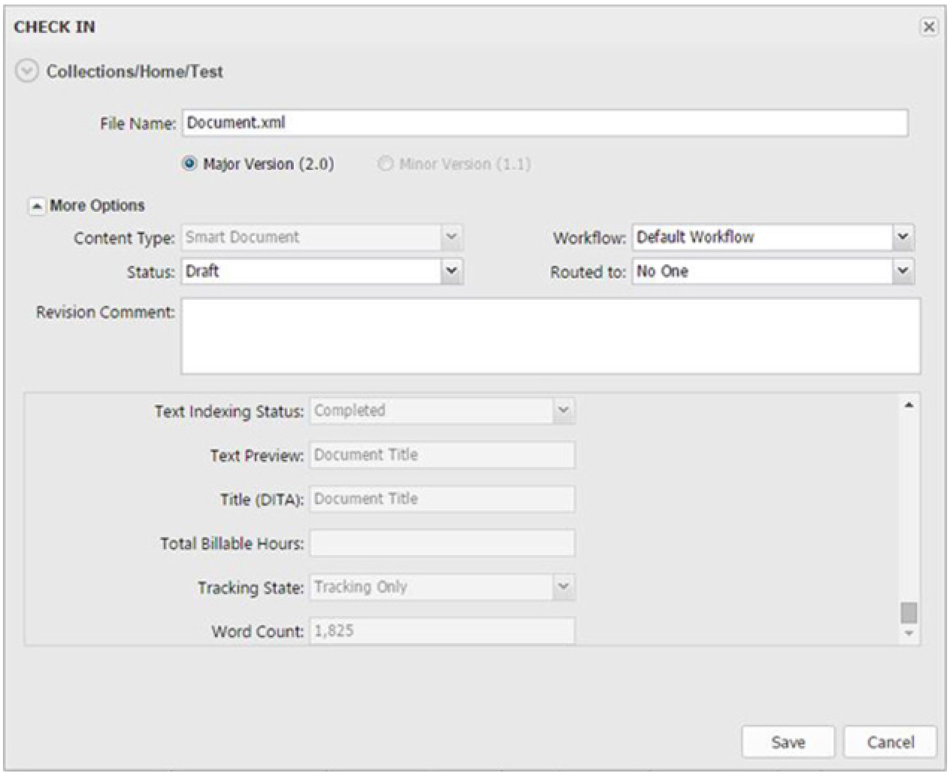


- Position - Use the **Position** toolbar button to sort the list by position in the authoring canvas in ascending or descending order.
- Date - Use the **Date** toolbar button to sort the list by **Date** in ascending or descending order.

Document specific tracking state

Tracking and highlighting are enabled based on a document's last saved tracking state.

The value of the tracking state will be displayed when you check in a document:



The Check In dialog

States for tracking will be saved as one of the following values of the `Tracking State` attribute.

- Disabled
- Highlighting Only
- Tracking And Highlighting
- Tracking Only

Navigating in the document

Use the keyboard to easily navigate within the text.

Use *Page Up* and *Page Down* to scroll the Editing Pane one page up or down in the document, no matter how many sections are in the document. Use the *Home* and *End* keys to go to the beginning and end of a line, respectively, or combined with the Ctrl key - to the beginning and end of the document. Move inside the text using the *Arrow* keys.

Keyboard shortcuts for Quark Author Web Edition.

Keyboard Command	Action
Ctrl+B	Bold selected text
Ctrl+I	Italicize selected text
Ctrl+U	Underline Selected Text
Alt+Shift + F	Open find text dialogue box

Keyboard Command	Action
Alt+Shift + H	Open find and Replace text dialogue box
Alt+Shift + L	Open insert hyperlink dialogue box
Alt+Shift + T	Open insert table dialogue box
Alt+Shift + U	Open bulleted list
Alt+Shift + O	Open numbered list
Alt+Shift + C	Open add comment dialogue box
Alt+Shift + I	Open insert image dialogue box
Alt+Shift + K	Open insert image from local disk dialogue box
Alt+Shift + G	Open insert figure dialogue box
Alt+Shift + E	Turn on change tracking
Alt+Shift + A	Accept changes
Alt+Shift + R	Reject changes
Alt+Shift + V	Open insert video dialogue box
Alt+Shift + N	Apply Normal Inline Style
Alt+Shift+ Q	Invoke equation editor dialogue box
Ctrl+1	Open Para Style Combo
Ctrl+2	Open Inline Style Combo
Ctrl+S	Save Revision
Ctrl+Shift+S	Save and Close
Ctrl+Alt+Q	Close Editor with Unsaved Changes Warnings
Ctrl+Q	Close Editor without Warning
Alt+ >	Select next tab in Right Pane
Alt+ <	Select previous tab in Right Pane
Alt+ }	Select next tab in Left Pane
Alt+ {	Select previous tab in Left Pane
Alt+]	Select next tab in Editor Ribbon
Alt+ [	Select Home tab in Editor Ribbon
Alt+ H	Select Home tab in Editor Ribbon
Alt+ I	Select Insert tab in Editor Ribbon
Alt+ R	Select Review tab in Editor Ribbon
Alt+ E	Select References tab in Editor Ribbon

Undo and redo

Standard **Undo** and **Redo** features make text editing easier by allowing you to revert or apply edits as needed.

The **Undo** feature is a quick way to cancel the last change and restore the document to its previous state. To undo the last action use either the **Undo** toolbar button or the *Ctrl+z* shortcut on your keyboard.

The **Redo** feature lets you revert the last undo operation. This means that the document returns to the state it was in before you performed the undo. To redo the last action use either the **Redo** toolbar button or the *Ctrl+y* shortcut on your keyboard.

Quark Author Web Edition supports many undo and redo levels, allowing you to go backward or forward as needed.

Cut, copy, and paste

Among the most common editing operations are cutting, copying, and pasting text. Quark Author Web Edition supports these operations and also allows you to paste content formatted in other applications like Microsoft Word.

To copy a text fragment, select the text and then copy it using the *Ctrl+c* shortcut on your keyboard. The formatting of the original text will be preserved.

To paste a text fragment, start with cutting it or copying from another source. When the text is in the clipboard, paste it using the *Ctrl+v* shortcut on your keyboard.

Reference note content (footnotes/endnotes) and metadata content are included when copying from one document to another in the same browser.

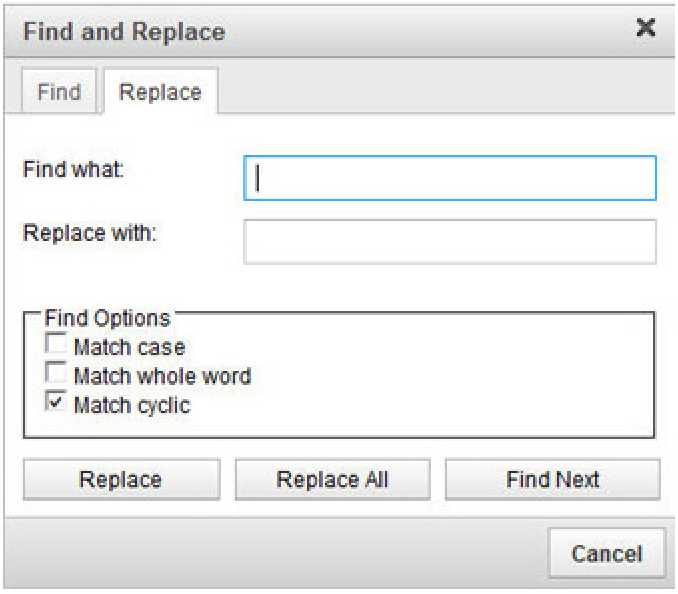
➡ Metadata configuration rules by document context are respected. This means metadata content will not be pasted if it will invalidate the schema.

The Platform Adapters for Microsoft Office allow you to copy Excel content and paste that into Quark Author Web Edition. To achieve this, copy the content from Excel and paste using Ctrl+Shift+c.

Find and replace

The **Find** and **Replace** features allow you to quickly search the text looking for specific words or phrases and replace them. This allows you to rapidly change multiple occurrences of a phrase in a document instead of manually finding and modifying each one.

The **Find** and **Replace** features are implemented using one dialog box with two tabs that let you switch between the **Find** and **Replace** features. Clicking on either the **Find** or **Replace** icon on the toolbar will bring up this dialog box.



The Find and Replace dialog

The **Find** tab consists of a search field and a few options that let you refine the search:

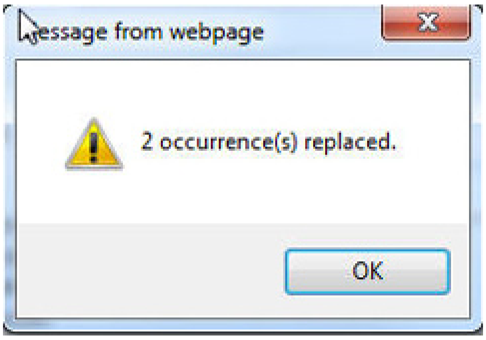
- **Match case** - Check this option for a case-sensitive search.
- **Match whole word** - Check this option to limit the search operation to whole words.
- **Match cyclic** - Check this option to continue the search from the beginning after the editor reaches the end of the document. This option is checked by default.

The **Replace** tab includes the following extra fields:

- **Replace with** - Enter the word or phrase that will replace the search term in the document.

After you enter the search term as well as the replacement term and select the options, press the **Replace** button. If you want to replace all occurrences of the search term in the document, press the **Replace All** button.

The system notifies you of how many replacements were made:



XML preview

If at any time you would like to check the XML view of your document, use the **XML** toolbar button to view the document in XML format. A read-only view of the text will appear containing all the relevant XML tags and attributes:

```
<?xml version="1.0" encoding="UTF-8"?>
<?Xpress productline="smartdoc"?>
<section xmlns="http://quark.com/smartcontent/3.0" id="_15cd210d-6d33-4965-bd95-c544f4f01780"
    type="document">
    <title>Quark Author Web Edition User Guide</title>
    <body>
        <p>
            <t>Document Body</t>
        </p>
    </body>
    <section id="_b5dff643-1d59-4c29-9a08-b29f2427e0e2" type="section">
        <title>Getting Started</title>
        <body>
            <p>
                <t>Section Body</t>
            </p>
        </body>
        <section id="_8782d07a-2e7f-4009-bf79-556aeb6b9702" type="subsection">
            <title>About Quark Author Web Edition</title>
            <body>
                <p>
                    <t>Sub-Section Body</t>
                </p>
            </body>
        </section>
        <section id="_ec9b30e6-0847-4dc9-bab8-fa052a4b25be" type="subsection">
            <title>Introduction to the Quark Author Web Edition User Guide</title>
            <body>
                <p>
                    <t>Sub-Section Body</t>
                </p>
            </body>
        </section>
```

An XML preview example.

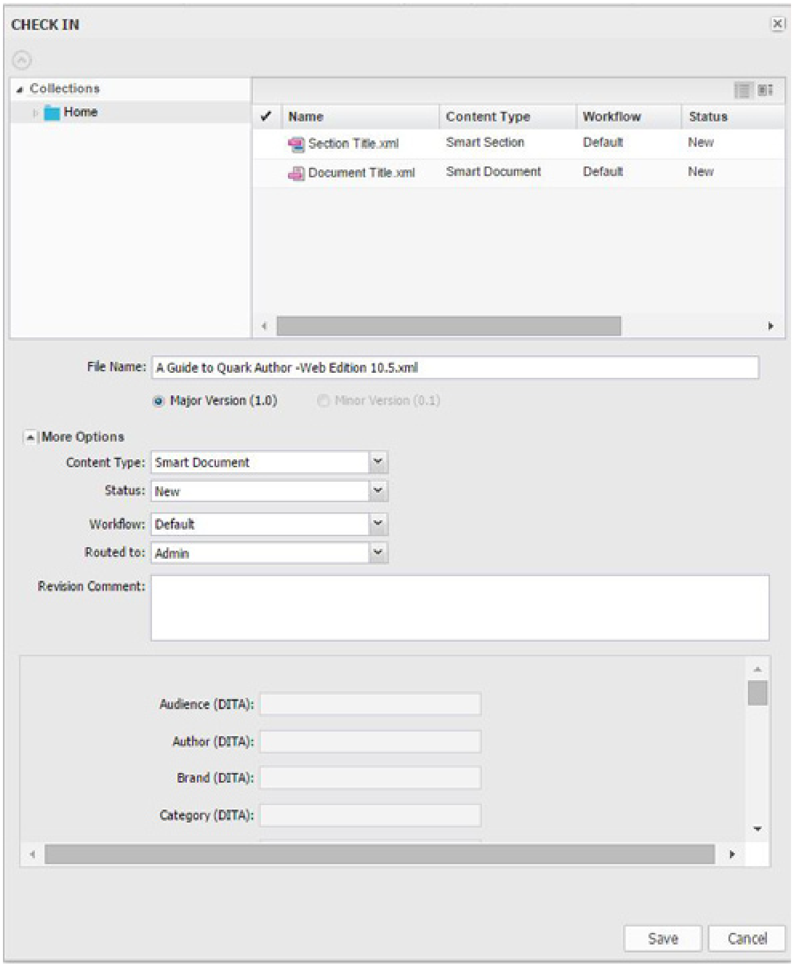
Saving and closing documents

Use the **Save Revision** button located at the header to save a revision of the document. The document will remain open for further editing.

Use the **Save and Close** button located at the header to check in the document.

Use the **Close** button located at the header to close the document. A draft version of the document will be saved.

For both the **Save Revision** and the **Save and Close** options, the **Check In** dialog box displays:



The Check In dialog

1. Choose a target collection from the collection list.
2. Enter a file name for the document in the **File Name** field.
3. To specify whether the asset is saved with a major or minor version number, click **Major Version (1.0)** or **Minor Version (0.1)**

➡ Access to the **Minor Version (0.1)** option is controlled by privileges.

4. Choose a content type from the **Content Type** drop-down menu.
5. Choose a workflow from the **Workflow** drop-down menu.
6. To indicate the asset's current status, choose an option from the **Status** drop-down menu.
7. To send the asset to a particular user or group, choose an option from the **Routed to** drop-down menu.

➡ If your workflow relies on automatic status-based routing, the **Routed to** drop-down menu value might change automatically when you choose an option from the **Status** drop-down menu.

➡ If you do not choose any name from the **Routed to** drop-down menu when you check in an asset for the first time, the asset is routed to the active user.

8. Enter revision comments for the version of the asset you are checking in, in the **Revision Comment** field. The revision comment will be stored with the asset. The revision comment also displays when you view revisions of the asset.
9. Change values for any attribute existing on the server, which is valid for this document and shown in the **Check In** dialog.
10. Click **Save**.

Autosave

Quark Author Web Edition's Autosave feature periodically saves changes during an active editing session. By default, changes to content or structure are saved every 30 seconds. The Editor's status bar will show the **Saving**... and **Saved** states to alert you when the content is autosaved. The next time you open the document, Quark Author Web Edition automatically loads the last available autosaved version of the document.

Autosave is also triggered when a user clicks the **Close** button in the header toolbar. Autosave is enabled only for documents which have been saved at least once to Platform. To avoid the risk of losing work, save the document to create an initial revision and trigger the autosave feature.

➡ Along with the primary document, changes to components which are checked out inline within the primary document are also saved as part of autosave. For example, a Smart Section or Smart Table contained within a checked out document may also be checked out by the same user (assuming the user has permissions). Changes to the parent document as well as the inline components are all autosaved according to the predefined interval.

Autosave as Minor Versions

The application periodically saves document content and saves it permanently as a version in Platform Server such that there is no risk of content loss and it is possible to continue editing document from any other machine. Details of all versions for current document are be available in the 'History' pane where number, time and content of previous version may be viewed.

Document Error Recovery

Recover your document easily in case of sudden non-compliance with the structure, or corruption during version changes.

Configurable interval

By default, a work-in-progress is saved every 30 seconds. The interval may be configured using the "Workspace-config.xml" file. See *Quark Author Web Edition System Administration Guide* for details.

Offline mode

Platform allows you to access and edit checked out documents while you are disconnected from the server. When you are working on a document and you are not connected to the server, the **Disconnected** status can be seen in the ribbon at the bottom of the **Editing** pane.

Quark Author Web Edition will detect if you have made any changes to the document and will automatically save the current content as a local draft.

Not all features will be available when working with a document in offline mode:

- If the document you are working on contains references to other documents that are not currently checked out, you will be able to view that content as read only, but you will not be able to edit the content.
- You can insert locally store content into your document, but that content will not be automatically checked into Platform.

When you are reconnected to the server, and check out a document that you were working on offline, the local draft will be opened and you will have the opportunity to save that version to the Platform server. The status bar shows a ‘Syncing’ message while the offline changes are being saved to the draft of the document. The message changes to ‘Sync complete’ when saving is complete.

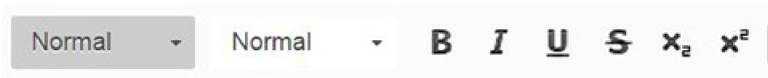
➡ Offline mode is only supported on Chrome browsers and requires HTTPS configuration.

Content editing

Text emphasis

Text emphasis determines the way your text will look in the published document.

The text styling features are grouped together on the **HOME** tab.



The bold, italics, underline and strike-through styles can be applied to the whole document, a paragraph, a word or phrase, or a single letter. The underline and strike-through styles will also be applied to all white space of the selected fragment.

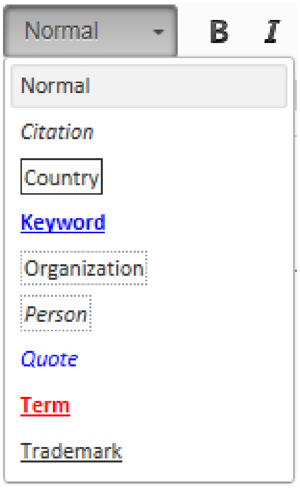
Using styles to format text

Formats and styles are predefined combinations of various formatting options that make it easier to keep the presentation of the text uniform.

Character styles

A character style is a collection of character formatting attributes that can be applied to text in a single step. By default, text that you type into a document will have the *Normal* character style applied to it.

To choose a character style, select a text fragment and click the **Tag Types** toolbar button on the **HOME** tab. The drop-down list contains several predefined character styles that you can apply to the selected text. To make the choice easier, the style names are displayed in the style that they represent, giving you a preview of what the text will look like:

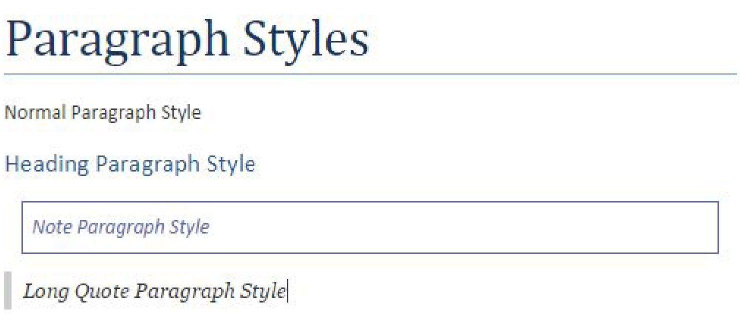


A character style can be applied to the whole document, a paragraph, a word or phrase, or a single letter.

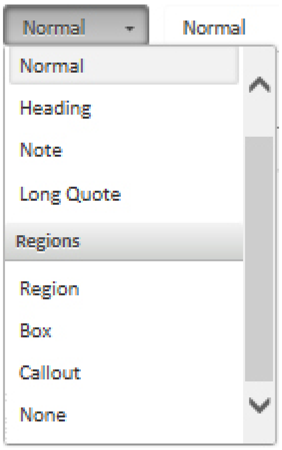
Paragraph styles

A paragraph style includes both character and paragraph formatting attributes, and can be applied to a paragraph or range of paragraphs.

Quark Author Web Edition includes four predefined paragraph styles: Normal, Heading, Note, and Long Quote. By default, Quark Author Web Edition automatically applies the *Normal* paragraph style to all text in a new document.



To apply a paragraph style, select the paragraph(s) that you want to format, click the **Para Types** toolbar button on the **HOME** tab and then choose the paragraph style you want. The drop-down list contains the predefined paragraph styles that you can apply to the selected text:



➡ To select a single paragraph for applying a paragraph style, you can click anywhere in the paragraph. To select more than one paragraph, click anywhere in the first paragraph and drag to anywhere in the last paragraph that you want to select. You do not need to select the entire paragraph.

➡ When you apply a paragraph style, character styles that you have applied to any text in the paragraph remain intact.

The paragraph style will default back to the *Normal* style when a new paragraph is started.

Change a paragraph style to a different paragraph style (i.e. from *Heading* to *Note*) by selecting the paragraph and then choosing the new paragraph style.

Removing styles

Remove a style applied with the **Para Types** or **Tag Types** menus by opening the drop-down list and clicking the formatting style name again.

Regions

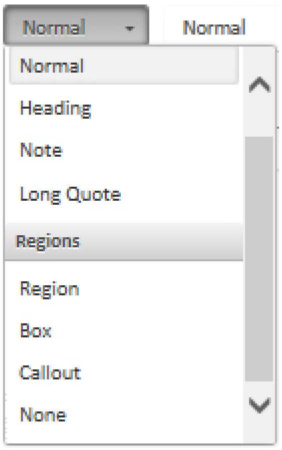
A region is a meaningful wrapper element that can be applied to a contiguous run of one or more block elements. This allows a user to perform the usual edits within the semantically wrapped content including:

- adding new content.
- deleting content.
- merging content into the region.
- separating content into multiple regions.
- nesting content within a region.

You select and apply a region similarly to the way you apply a paragraph style, but it behaves differently from other paragraph styles in several ways.

Creating a region

To create a region, place the cursor in a paragraph, click the **Para Types** toolbar button on the **HOME** tab and then choose the desired region type (Quark Author Web Edition includes three predefined region types: *Region, Box* and *Callout*).



A region is created and the current paragraph is nested inside that region.

When creating a region, the behavior varies slightly based on the location of the cursor or your selection.

- If inside a table cell:

  The region is created within the cell and selected content is included in the region. Each selected table cell is a separate region of the same type.

- If inside a figure or video:

  A region cannot be the child of a figure or video, so if the cursor is in a figure or video, the entire figure or video is added to the new region. When a selection partially or completely includes a figure or video, the figure or video will be included in the new region.

- If inside a list item:

  When the cursor is in a list item, the complete list is wrapped in the new region. If the list item is part of a set of contiguous non-numbered paragraphs, a table, or a figure, then the new region will be nested in the list item.

➡ To select a single paragraph for creating a region, click anywhere in the paragraph. To select more than one paragraph, click anywhere in the first paragraph and drag to anywhere in the last paragraph that you want to select. You do not need to select the entire paragraph.

Working with regions

A region can contain other components besides text such as figures, images, lists and tables. A region can also be applied to cells within a table.

Exiting a region

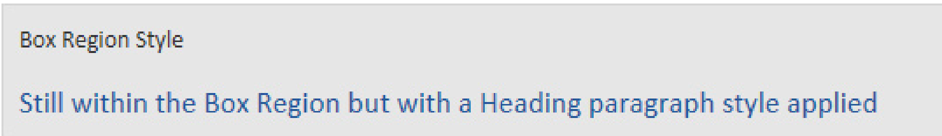
If the cursor is within one of the region styles (*Region, Box* or *Callout*) and a new paragraph is started, the paragraph will be created inside the same region with the

Normal paragraph style applied to it. There are three ways to exit a region and begin a new *Normal* paragraph outside of the region:

- Place your cursor within the region and **Ctrl-Enter**.
- Place your cursor within the region and click the **Insert Paragraph After** icon on the dynamic **REGION** tab.
- Right-click within the region and choose **Insert Paragraph After** from the context menu.

Paragraph styles within regions

If you select a paragraph within a region, and attempt to apply a paragraph style to it, the style will be applied to the paragraph, with no effect on the remaining paragraphs in the region. For example, if you select (or click in) a paragraph within a *Box* region and then apply the *Heading* style, the paragraph is formatted with the *Heading* paragraph characteristics, but the paragraph will still be contained within the *Box* region.



Region titles

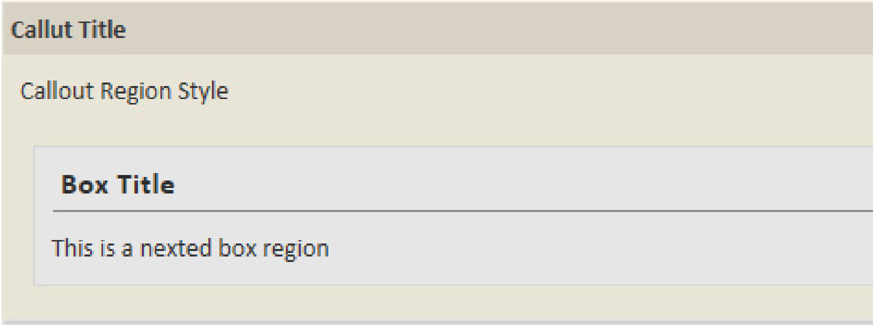
You can add a title to an entire region. To add a title to a region, right-click within the region and choose **Region Title** from the context menu, or place the cursor within the region and click the **Region Title** icon on the dynamic **REGION** tab.

Copying and pasting regions

To copy and paste an entire region and preserve the region style, select the entire contents of the region. When a partial selection is copied and pasted, the region style is lost.

Nesting regions

Regions can be nested, i.e. a *Box* region within a *Callout* region, as shown here:



To nest a region within a region, you must first create the content. Next, select the paragraph or paragraphs you want in the nested region and then choose the new region style.

➡ To change an entire region from one style to another, place the cursor inside the existing region and then select the new region style.

Cross reference to a region

You can insert a cross-references to a region in a document, see "*Inserting a cross reference*".

If a region contains a title, the title will be used to create the cross-reference. If a region does not contain a title, the cross-reference will be created using the first 32 characters of the first paragraph present in that region.

Removing a region

There are three ways to remove a region:

- Place the cursor within the region and choose **None** from the **Para Types** drop-down menu.
- Place the cursor within the region and click the **Remove Region** icon on the dynamic **REGION** tab.
- Right-click within the region and choose **Remove Region** from the context menu.

The region will be removed but any character or paragraph styles that you have applied to text and paragraphs within the region will remain intact. The region title will remain, but will revert to a **Normal** paragraph style.

Rich text

Lists

Lists provide a way to structure text in a clear manner, as well as group items that belong together. Quark Author Web Edition lets you create two types of lists:

- Bulleted (unordered)

- Numbered (ordered)

Inserting a list

To create a list, click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** toolbar button on the **HOME** tab. A default list marker will appear at the beginning of the line of text that contains the cursor and the line will become indented.

If you want to add further list items, press *Enter* on your keyboard. The cursor will move to the next line with a list marker placed at its beginning. The list is continued automatically as long as you press *Enter* at the end of a line. If you want to suppress list creation, press *Enter* in an empty line with a list marker.

➡ To convert part of a bulleted list to a numbered list and vice versa, select the desired list items and click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** button on the **HOME** tab.

➡ To convert a complete bulleted list to a numbered list or vice versa, place the cursor in the first paragraph of any list item and click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** toolbar button on the **HOME** tab.

Multiple content block lists

A multiple content block list item is a list item containing one or more content blocks, such as paragraphs, sub-lists, tables or figures, in addition to the initial paragraph of text. There are two ways to add multiple content blocks to a list item:

- Place the cursor at the beginning of the list item following the list item you want to add multiple content blocks to and press the *Backspace* key.

  That list item will become the next paragraph in the preceding list item.

- Place the cursor in the list item following the list item you want to add multiple content blocks to and click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** toolbar button on the **HOME** tab.

If you hit *Enter* at the end of a multiple content block list item, a new paragraph will be added to the same list item.

To change a paragraph of a multiple content block list item into a separate list item, place the cursor within the paragraph and click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** toolbar button on the **HOME** tab again.

EARLY LESSONS LEARNED FROM THE 2009 H1N1 OUTBREAK

1. **Investments in pandemic planning and stockpiling antiviral medications paid off.**
Federal, state, and local efforts to develop and exercise pandemic response plans over the last several years enabled public health officials to react to the outbreak effectively and keep the public informed. Investments in antiviral stockpiles and enhanced vaccine manufacturing capacity also proved to be prudent.

2. **Public health departments did not have enough resources to carry out plans.**
Federal, state, and local health departments are stretched too thin to adequately respond to emergencies after decades of underfunding the public health infrastructure. Capacity to track, investigate, and contain cases of H1N1 has been hampered due to lack of resources.

Name of pandemic	Date	Deaths	Case fatality rate	Subtype involved	Pandemic Severity Index
1889–1890 flu pandemic(Asiatic or Russian Flu)[32]	1889–1890	1 million	0.15%	possibly H3N8or H2N2	N/A
Asian Flu	1957–1958	1 to 1.5 million	0.13%	H2N2	2

3. **Providing clear, straightforward information to the public was essential for allaying fears and building trust.**
Informing the public about what is known about an outbreak, acknowledging that certain information is not yet known, and updating facts as they become available is paramount to help contain the spread of disease and also give people the facts they need to be prepared, not scared. During the outbreak, the President and other leaders around the country served as clear spokespeople, conveying consistent, accurate information about good hand hygiene, cough/sneeze etiquette, and the need for people to stay home if sick. Effective leadership and communication helped dispel rumors and myths -- from allaying concerns about the safety of imported Mexican foodstuffs to reversing the unfair characterization of Spanish speaking people as carriers of the contagion. Public health officials also encountered the need to explain to members of the public that different policies are not necessarily inconsistent, but tailored to local realities.

➡ You can insert videos, tables, Microsoft Excel components, figures, images and cross references into list items.

Converting existing text to a list

To turn existing text into a list, select one or more paragraphs and click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** toolbar button on the **HOME** tab. Each paragraph will then become a separate list item.

Converting a list to text

To remove list formatting, leaving the text of the list items intact, select the list in the document and click the **Insert/Remove Bulleted List** or the **Insert/Remove Numbered List** toolbar button on the **HOME** tab. The list markers and indentation will be removed and each of the former list items will become a paragraph.

Nesting lists

Sometimes one list level is not enough to represent a more complicated structure of items. Quark Author Web Edition lets you add multiple levels of nesting to your bulleted and numbered lists.

You can also combine bulleted and numbered lists of various indentation levels.

Increasing indent

To create a nested bulleted or numbered list, use the **Increase Indent** feature. Place the cursor in the line that should start the nested list and click the **Increase Indent** toolbar button on the **HOME** tab. The list item will become indented and the list marker will change. The next item added to the list will have the same indentation as the previous one and thus become a part of the nested list.

Increase Indent is not available for the first list item, or for subsequent items in a multiple content block list item.

➡ If the selection is across a multiple content block list item boundary, Both **Increase Indent** and **Decrease Indent** will be disabled.

Decreasing indent

If you want to end the nested list and return to the previous indentation level, use the **Decrease Indent** feature. Place the cursor in the line that should be a continuation of the previous list and click the **Decrease Indent** toolbar button on the **HOME** tab. The indentation of the list item will decrease and the list marker will change back to the marker for a list of a higher level.

Decrease Indent is not available for subsequent items in a multiple content block list item.

Inserting Hyperlinks

The **Link** feature lets you add clickable hyperlinks to your documents.

To insert a link in your document, click the **Link** toolbar button on the **REFERENCES** tab or use the *Ctrl+L* keyboard shortcut. If you want the link to be assigned to a word or phrase, select it first. If no text is selected, the link URL will appear in the document as-is.

Use the **Link** dialog box to choose the link type and configuration options pertaining to your choice.

The Link dialog box

- **Protocol** - the communication protocol used with the web address. You can choose between **http://** and **https://**
- **URL** - the web address of the resource that the link is pointing to. It may be located on the same server as the web site you are currently on or an external server. If you want to use an external address, you must use the full absolute path (for example *http://example.com/about.html*).

Edit an existing hyperlink by double clicking on the hyperlink, right-clicking on the hyperlink and choosing **Edit Link** from the context menu, or by placing the cursor inside the hyperlink and then clicking the **Link** toolbar button on the **REFERENCES** tab.

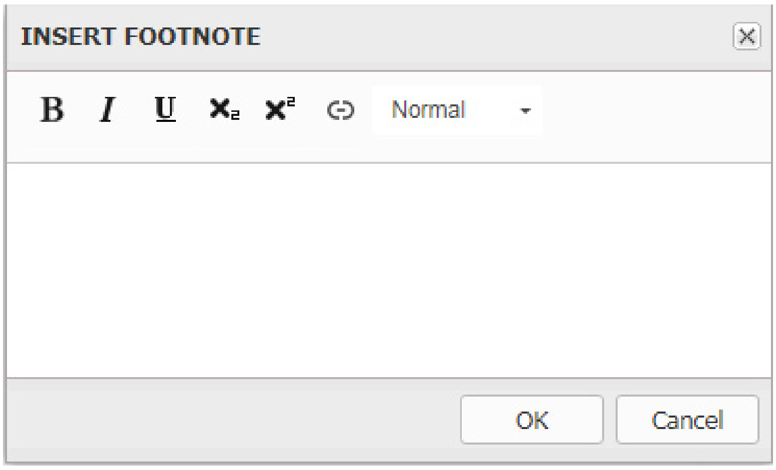
Delete the hyperlink by right clicking on the hyperlink and choosing **Unlink** from the context menu.

Footnotes and endnotes

Inserting a footnote

To insert a footnote in your document, place your cursor in the text where you want the footnote and click the **Insert Footnote** toolbar button on the **REFERENCES** tab.

The **Insert Footnote** dialog displays.



The Insert Footnote dialog

Type in the text of your footnote and click **OK**. The footnote will be placed at the cursor location. Footnotes are shown at the end of the page in previews.

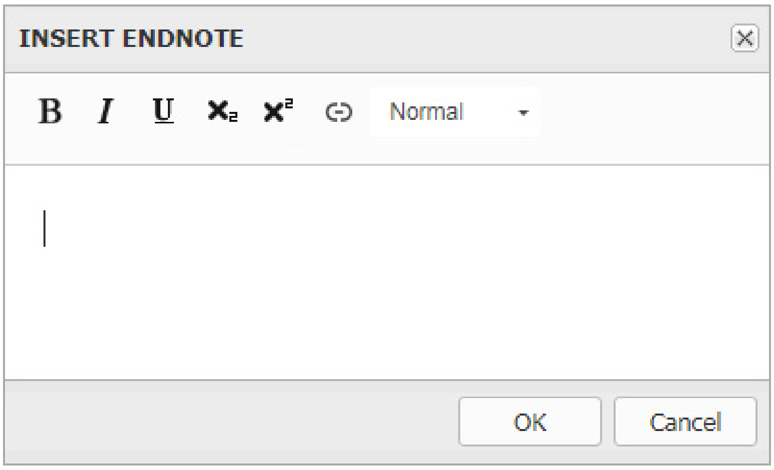
➡ External hyperlinks can be applied to footnote/endnote content.

➡ All in-line markup is retained when content from the canvas is pasted to a footnote/endnote and vice-versa.

Inserting an endnote

To insert an endnote in your document, place your cursor in the text where you want the endnote and click the **Insert Endnote** toolbar button on the **REFERENCES** tab.

The **Insert Endnote** dialog displays.



The Insert Endnote dialog

Type in the text of your endnote and click **OK**. The Endnote is added at the cursor location. The Endnotes are shown at the end of the document in Previews.

Cross references

The **Cross Reference** feature lets you add cross references to your documents, pointing to any other Section, Figure or Table in the document.

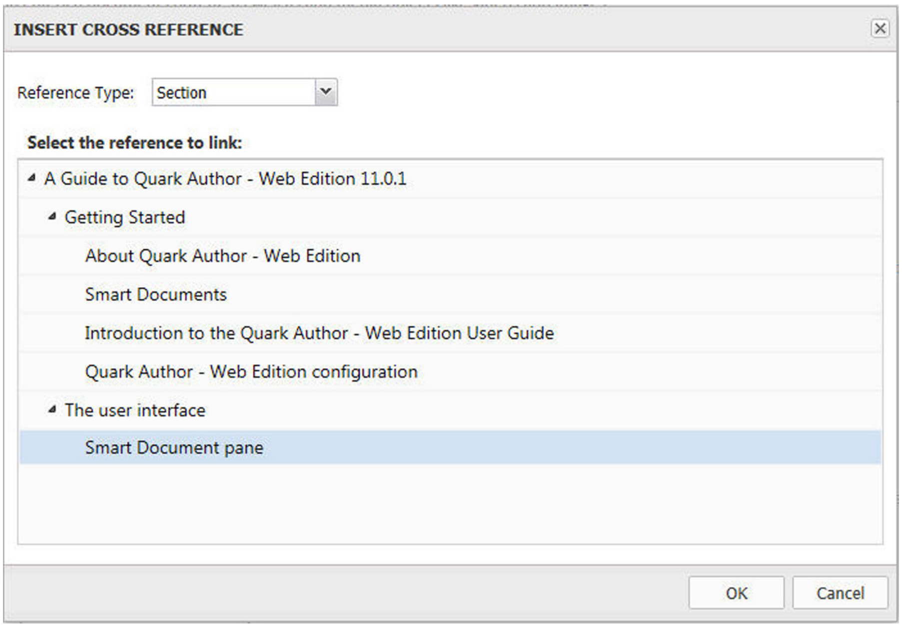
Inserting a cross reference

There are two types of cross references:

- Synchronized Cross Reference - the link text is derived from the referenced content and will be refreshed automatically from the referenced content if the referenced content is updated.
- Unsynchronized Cross Reference - the link text is user provided and is not updated based on changes to the referenced content. An unsynchronized reference can be changed into a synchronized one using the **Synchronize Cross Reference** toolbar command.

To insert a synchronized cross reference in your document:

1. Place the cursor where you want the cross reference and click the **Insert Cross Reference** toolbar button on the **REFERENCES** tab. The **Insert Cross Reference** dialog box displays.



The Insert Cross Reference dialog box

2. Choose the type of cross reference you are inserting from the drop-down menu: **Section**, **Table**, **Figure**, **Box**, **Region** or **Callout**.

3. Once you have chosen a cross reference type, the available references to link to will be listed. Choose a reference to link to and click **OK**. The cross reference will be inserted.

➡ Any changes made at the cross-reference link will be reflected in the cross-reference text.

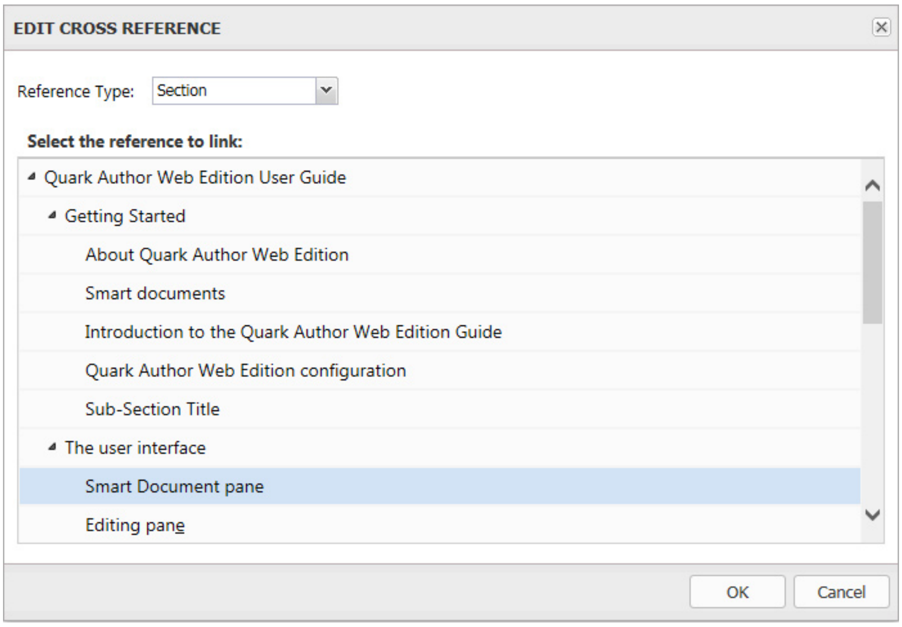
To insert an unsynchronized cross reference, select text in your document and then insert a cross reference, the cross reference and the link will not be synchronized.

➡ Control+Click on any cross reference to jump to the cross reference link.

Editing a cross reference

To edit an existing cross-reference:

1. Double click on the cross-reference, right click on the cross-reference and choose **Edit Cross Reference** from the context menu, or place the cursor in the cross-reference and then click the **Insert Cross Reference** button. The **Edit Cross Reference** dialog box displays.



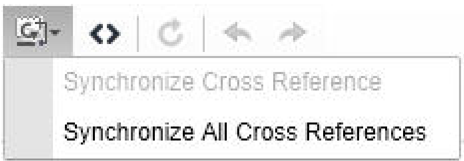
The Edit Cross Reference dialog box

2. Choose the type of cross-reference you want from the drop-down menu: **Section**, **Table**, **Figure**, **Box**, **Region** or **Callout**.
3. Once you have chosen a cross-reference type, the available references to link to will be listed. Choose a reference to link to and click **OK**. The cross-reference will be changed to your new selections.

Synchronize cross references

Change an unsynchronized cross-reference to a synchronized cross-reference using the **Synchronize Cross Reference** toolbar button on the **REFERENCES** tab.

You can choose to synchronize the selected cross-reference or all cross-references in the document.



Figures and images

Inserting an image

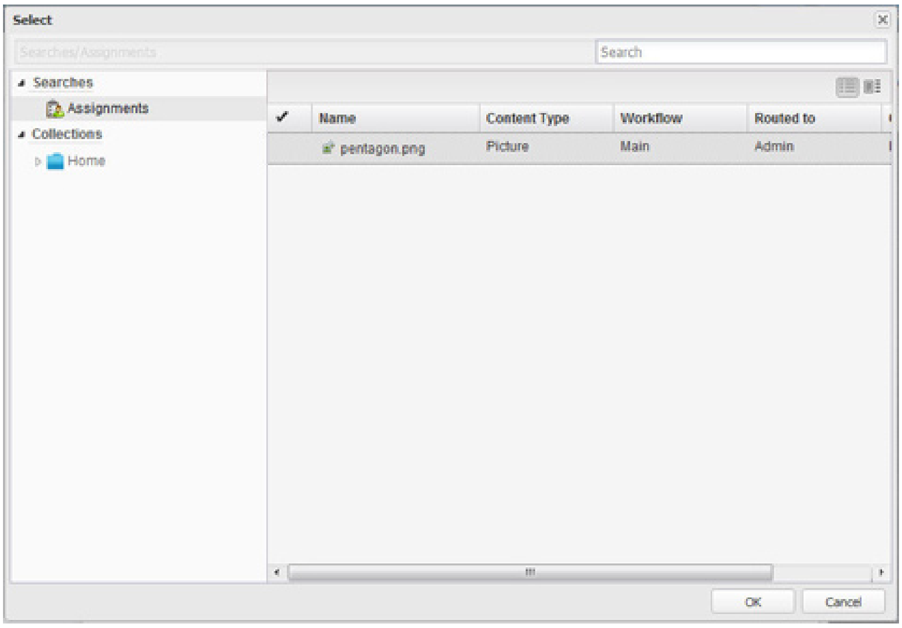
Images can be inserted from the Platform repository, from a local file system, pasted from the clipboard and by dragging and dropping.

Inserting a Platform image

To insert an image from the Platform repository:

1. Place your cursor in the document where you want to insert the image, click the **Insert Image** toolbar button on the **INSERT** tab and choose **From Platform** from the drop-down menu.

   The **Select** dialog is displayed.



The Select dialog

2. Browse to the desired image and select it.

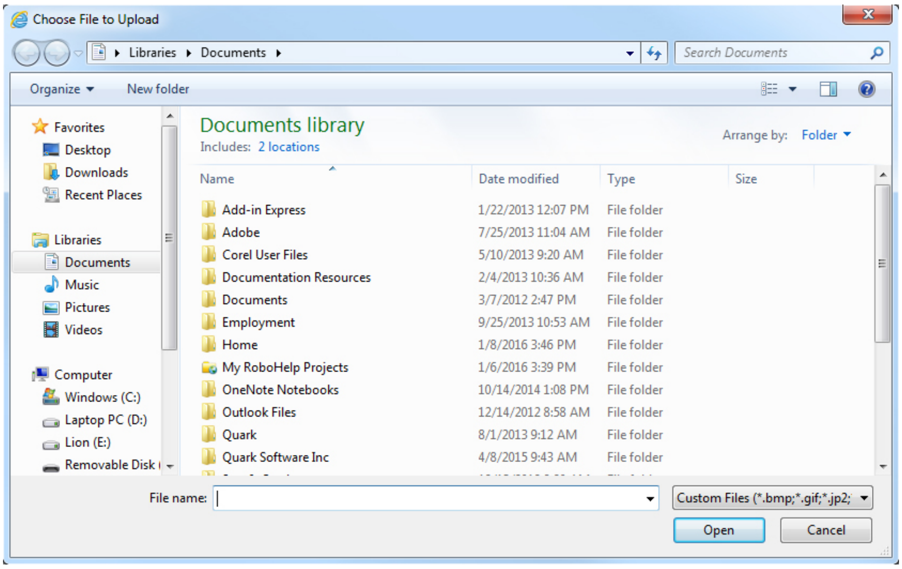
   The image will be inserted into the document.

Inserting a local image

To insert an image from a local file system:

1. Place your cursor in the document where you want to insert the image, click the **Insert Image** toolbar button on the **INSERT** tab and choose **From Local File System** from the drop-down menu.

   The **Choose File to Upload** dialog is displayed.

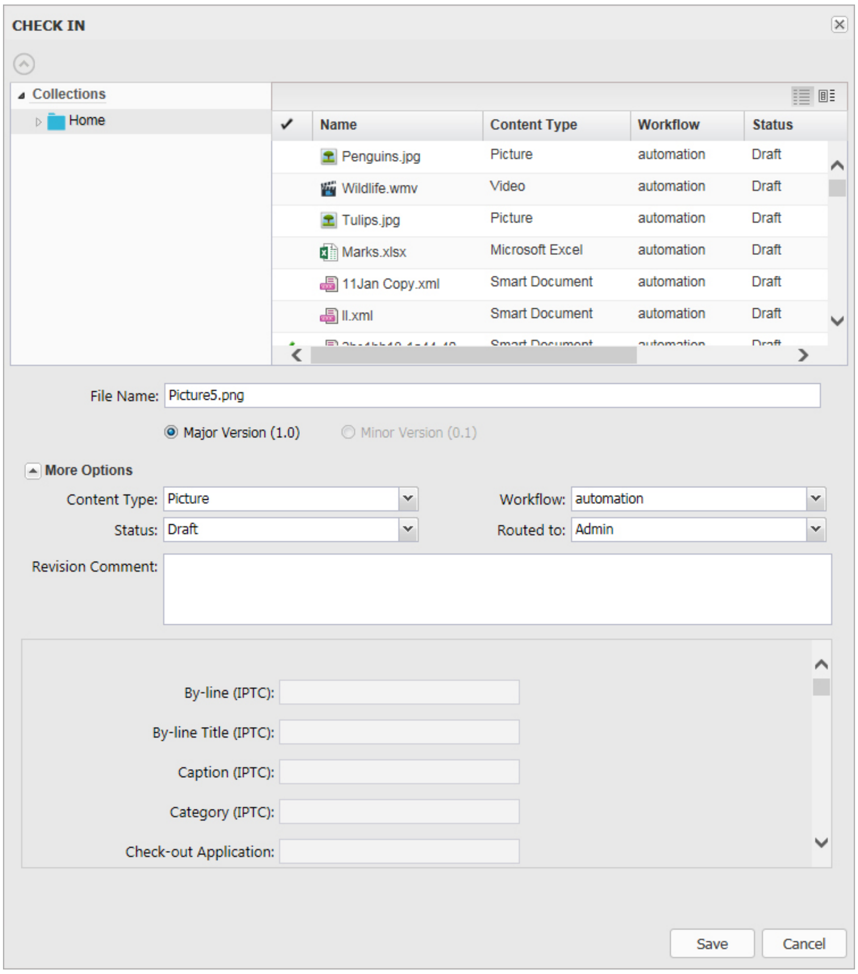


The Choose File to Upload dialog

2. Browse to the desired image and select it.

➡ You can also select the local image you wish to insert and drag and drop it into your document. You can also insert images copied to the clipboard (may also be copied from MS Excel, Word, PowerPoint, etc.).

You will be prompted to check in the image:



The Check In dialog

3. Specify the Platform information for the asset.

4. Click **Save**.

   The image is uploaded and checked in to the Platform repository, and inserted into the document.

Inserting a figure

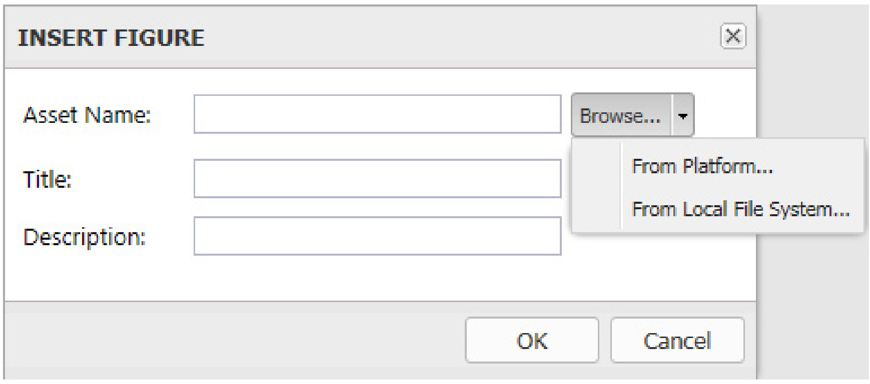
Figures can be inserted from the Platform repository or from a local file system.

Inserting a Platform figure

To insert a figure from the Platform repository:

1. Place your cursor in the document where you want to insert the figure and click the **Insert Figure** toolbar button on the **INSERT** tab.

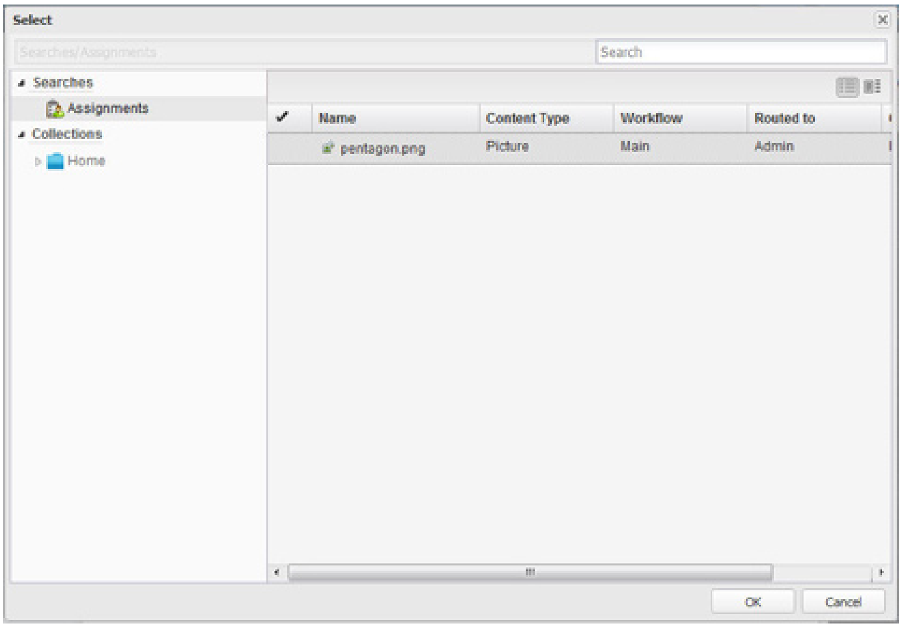
   The **Insert Figure** dialog is displayed.



The Insert Figure dialog

2. Click the **Browse** button and choose **From Platform** from the drop-down menu.

   The **Select** dialog is displayed.



The Select dialog

3. Browse to the desired figure and select it.
4. Enter the **Title** and **Description** of the desired figure and click **OK.**

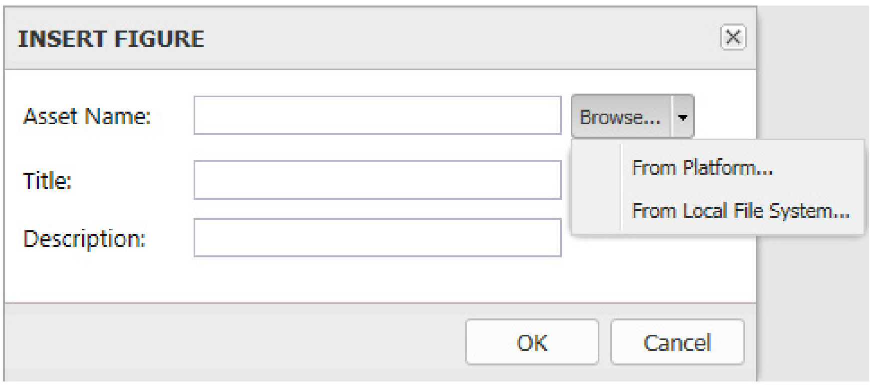
   The figure will be inserted into the document.

Inserting a local figure

To insert a figure from a local file system:

1. Place your cursor in the document where you want to insert the figure and click the **Insert Figure** toolbar button on the **INSERT** tab.

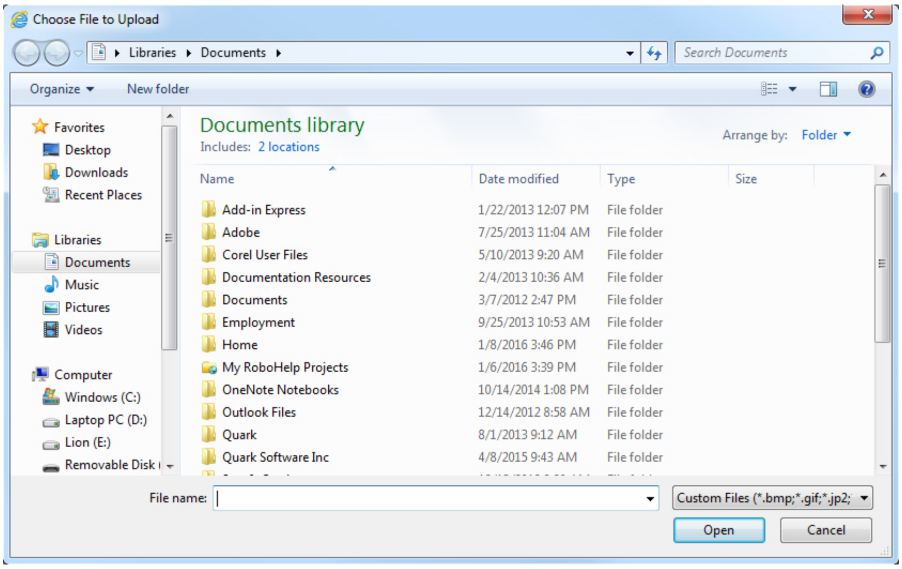
   The **Insert Figure** dialog is displayed.



The Insert Figure dialog

2. Click the **Browse** button and choose **From Local File System** from the drop-down menu.

   The **Choose File to Upload** dialog is displayed.

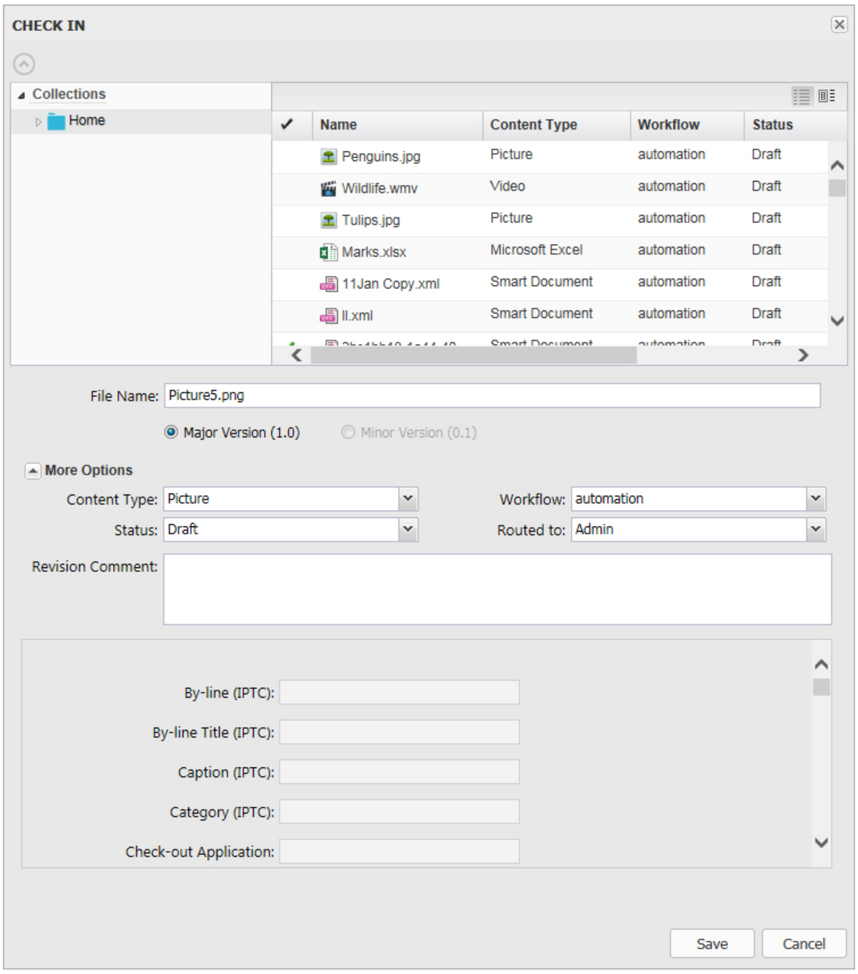


The Choose File to Upload dialog

3. Browse to the desired figure and select it.

4. Enter the **Title** and **Description** of the desired figure and click **OK.**

You will be prompted to check in the image:



The Check In dialog

5. Specify the Platform information for the asset.
6. Click **Save**.

   The figure will be uploaded and checked in to the Platform repository, and inserted into the document.

Resizing figures and images

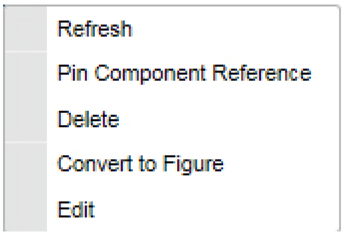
After you have placed a figure or an image in the document, you can resize it by clicking on the bounding box and dragging it to the desired size.

Replacing a figure or an image

After you have placed a figure or an image in the document, double clicking on it displays the **Select** dialog, allowing you to select another figure or image to replace it.

Converting an image to a figure

After you have placed an image in the document, convert it to a figure by right-clicking on it and selecting **Convert to Figure** from the context menu.



The Image context menu

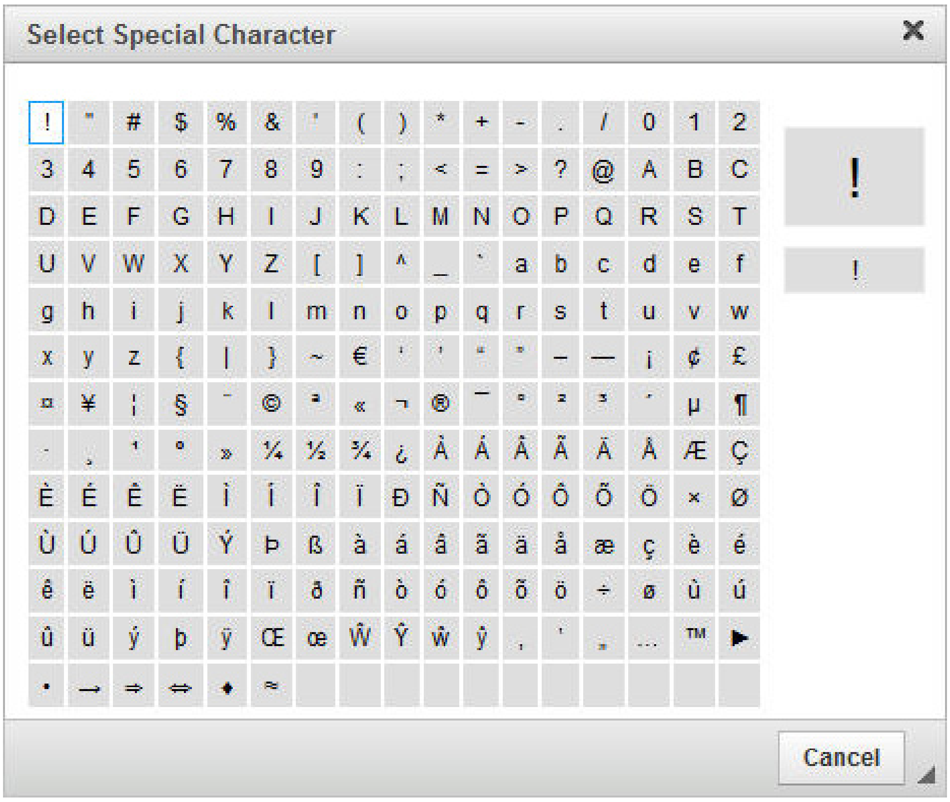
Copy & Paste Complex Figure Elements (Bodydivs)

Bodydiv copy and paste is now much easier and ensures you always copy the entire block of content and not just elements of the content. Simply click on the bodydiv figure and two icons will appear, one for cutting and one for pasting. You can then paste the bodydiv in its entirety either in the same document or a new one.

Inserting special characters

To insert a special character into your document, place your cursor in the document where you want to insert the special character and click the Ω **Insert Special Character** toolbar button on the **INSERT** tab.

The **Select Special Character** dialog window displays and allows you to choose a symbol from a set containing Latin letters, numbers (including fractions), currency symbols, punctuation, arrows, and mathematical operators.



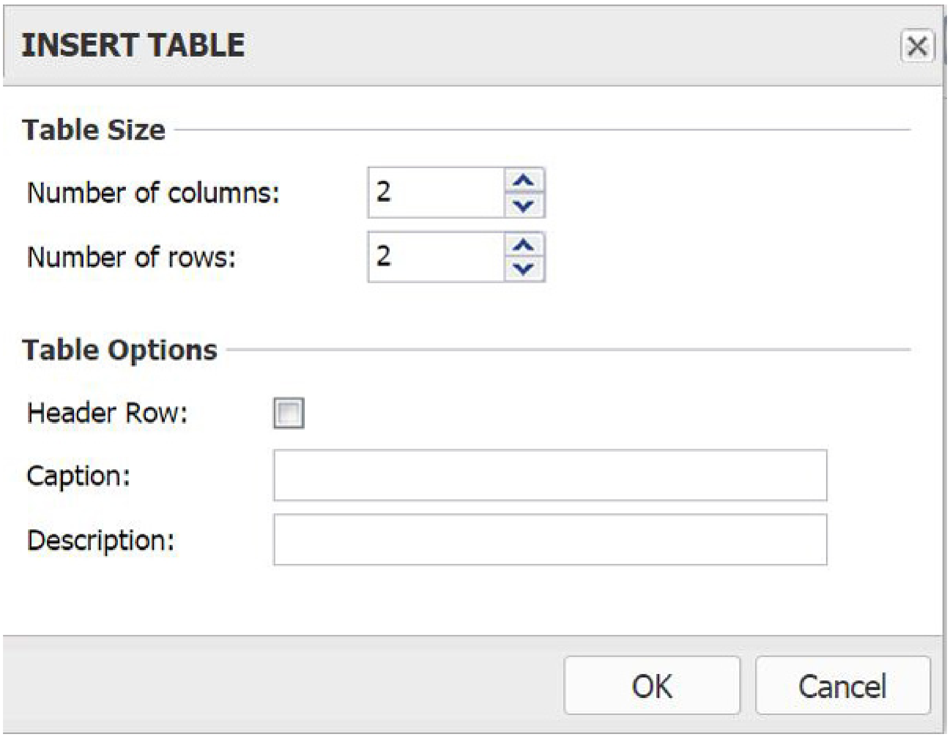
The Select Special Character dialog

Select the character you need. The dialog window will close automatically and the special character will appear where the cursor is positioned in the text.

Tables

Inserting tables

To insert a table, click the **Insert Table** toolbar button on the **INSERT** tab. The **Insert Table** dialog displays:



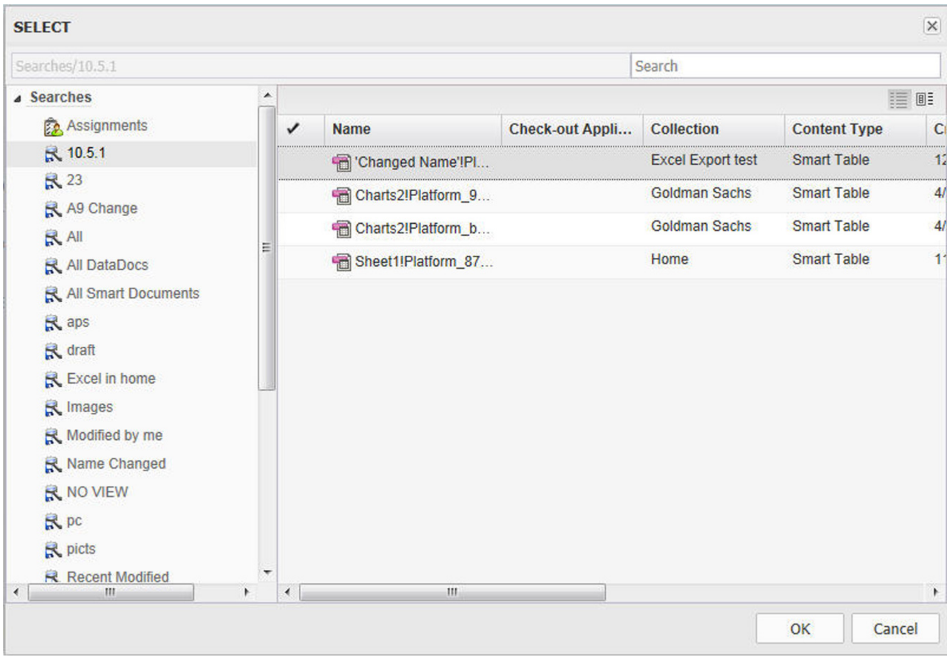
The Insert Table dialog box

Specify the table criteria:

- **Number of columns** - the number of columns in the table (mandatory).
- **Number of rows** - the number of rows in the table (mandatory).
- **Header Row** - check this box if you want your table to have headers.
- **Caption** - the label of the table that is displayed on top of it.
- **Description** - a description of your table.

Inserting tables from server

To insert a smart table, click the **Insert Table from Server** toolbar button on the **INSERT** tab. The **Select** dialog displays:

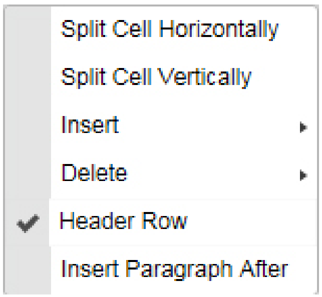


The Select dialog box

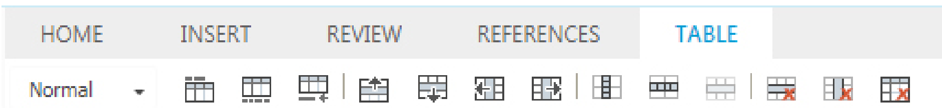
Browse to the desired table and select it.

Editing tables

To edit the table, right-click on any cell inside the table to open the table context menu, or place your cursor on any cell inside the table and select the dynamic **TABLE** tab. Options will be enabled/disabled based on the current selection.



The context menu for a table



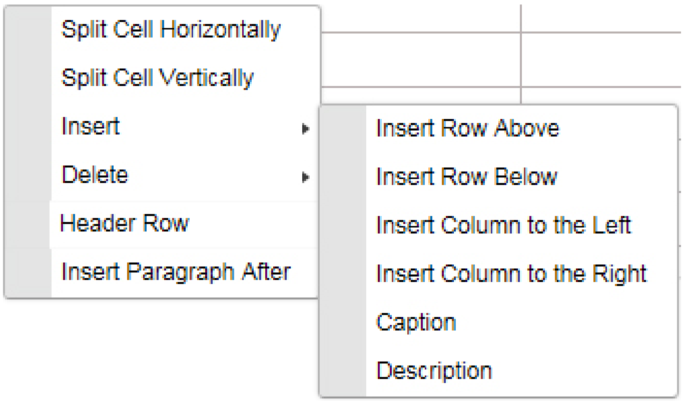
The dynamic TABLE tab of the Toolbar Ribbon

To insert a new paragraph after the table, use the **Insert Paragraph After** option. A new paragraph will be inserted directly after the table.

Inserting rows and columns

To insert additional rows and columns, right-click on the desired table, row or column and use the **Insert** option.

Hover your mouse over the **Insert** menu option to display further options.



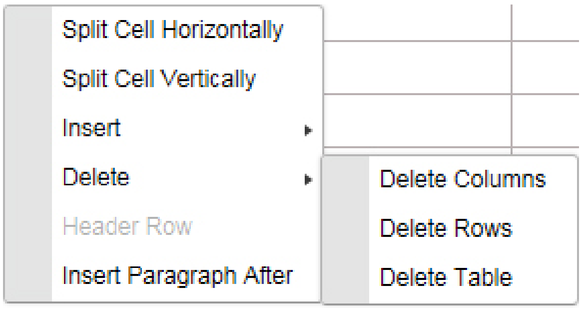
Insert context menu option elements:

- **Insert Row Above** - inserts a new row before the selected row.
- **Insert Row Below** - inserts a new row after the selected row.
- **Insert Column to the Left** - inserts a new column to the left of the selected column.
- **Insert Column to the Right** - inserts a new column to the right of the selected column.
- **Caption** - allows you to add a caption to the table.
- **Description** - allows you to add a description to the table.

Deleting rows and columns

To delete an entire table and its contents, or individual rows or columns, right-click on the desired table, row or column, and use the **Delete** option.

Hover your mouse over the **Delete** menu option to display further options.



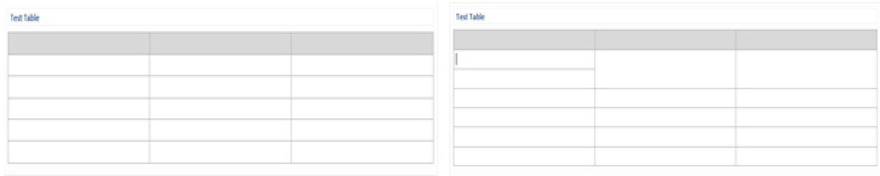
Delete context menu option elements:

- **Delete Columns** - deletes the selected column.
- **Delete Rows** - deletes the selected row.
- **Delete Table** - Deletes the entire table and its contents.

Splitting cells

To split a single cell into two cells:

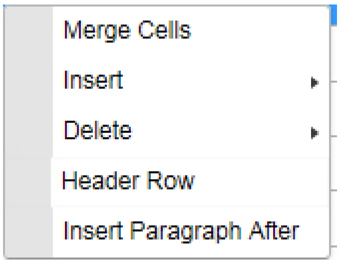
1. Place the cursor in the desired cell.
2. Right-click and choose **Split Cell Horizontally** or **Split Cell Vertically**.



An example of splitting a table cell horizontally.

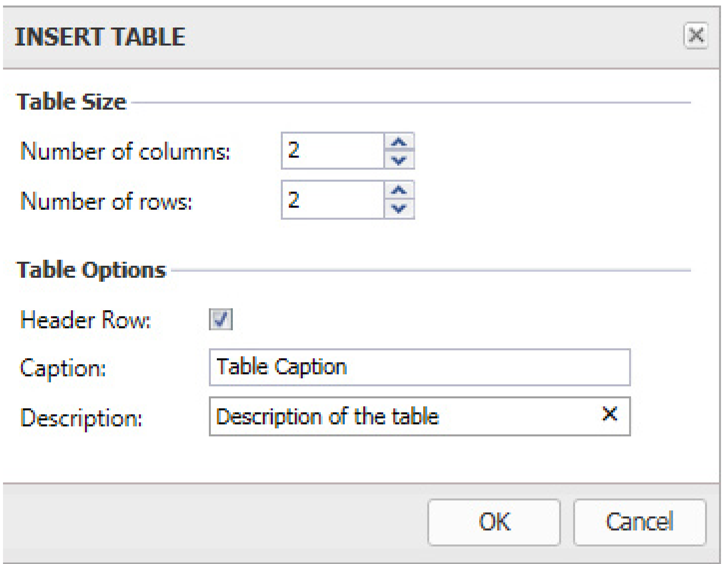
Merging cells

To merge cells together, select the cells to be merged, right-click and choose the **Merge Cells** option.



Adding captions and header rows

When you create a table, you can choose to add a header row, caption, and description to the table.



To insert a caption or description to an existing table:

1. Right-click on the desired table.
2. Hover your mouse over the **Insert** menu option to display further options.
3. Choose **Caption** or **Description** from the menu.

To convert the first row of an existing table to a header:

1. Right-click on the first row of the table.
2. Choose **Header Row** from the menu.

Copy and pasting table cells

You can copy selected cells from a table and paste the content into a different cell of the same table, or you can use them to create a new table.

To create a new table from selected cells of a table:

1. Select the table cells to copy and click CTRL-C to copy them.

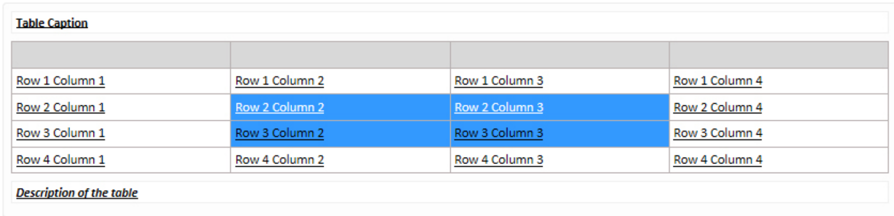


Table Caption

Row 1 Column 1	Row 1 Column 2	Row 1 Column 3	Row 1 Column 4
Row 2 Column 1	Row 2 Column 2	Row 2 Column 3	Row 2 Column 4
Row 3 Column 1	Row 3 Column 2	Row 3 Column 3	Row 3 Column 4
Row 4 Column 1	Row 4 Column 2	Row 4 Column 3	Row 4 Column 4

Description of the table

2. Place the cursor where you want the new table, and click **Ctrl-V**.

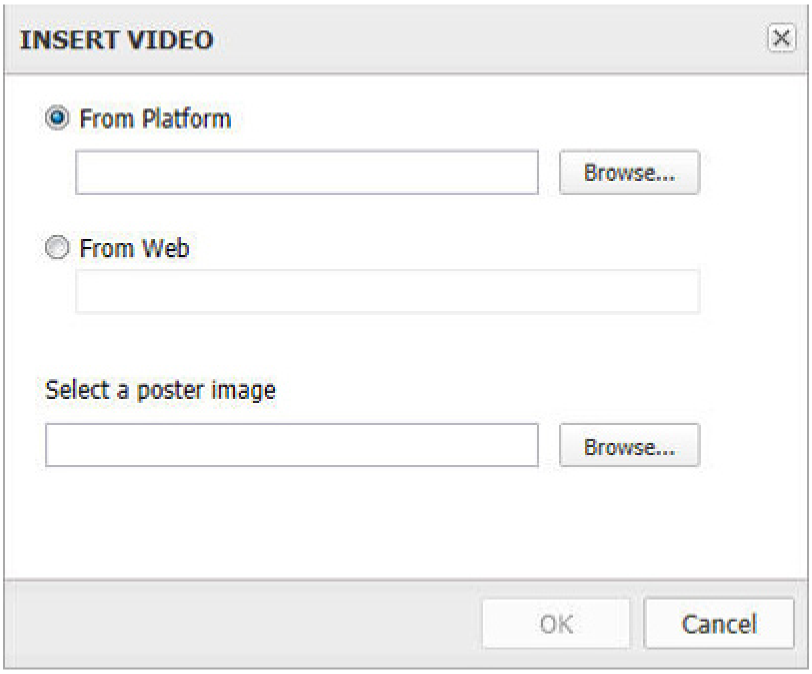
Row 2 Column 2	Row 2 Column 3
Row 3 Column 2	Row 3 Column 3

A new table is created comprised of the selected and copied cells.

Inserting videos

To insert a video:

1. Click the **Insert Video** toolbar button on the **INSERT** tab. The **Insert Video** dialog displays:



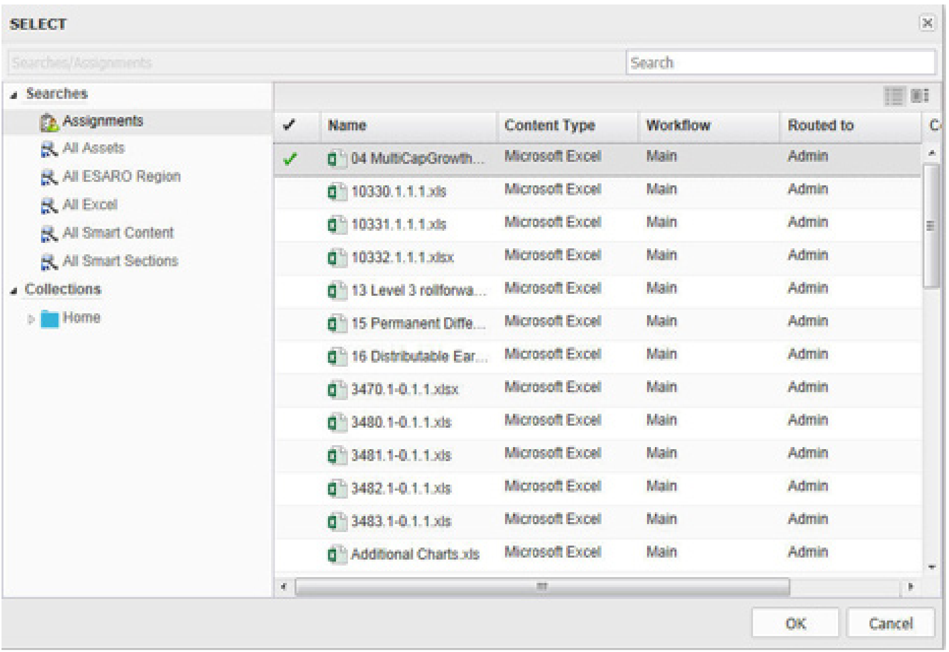
The Insert Video dialog box

2. Choose **From Platform** or **From Web**.
3. Select **Browse** to browse to the location of the desired video.
4. Under **Select a poster image**, choose **Browse** to select an image to use for the video.
5. Click **OK** to insert the chosen video.

Inserting Microsoft Excel components

The Web Editor allows you to insert Excel Tables and Charts into your document. To insert Excel content, click the **Insert Excel Components** toolbar button on the **INSERT** tab and choose **Insert Table** or **Insert Chart** from the drop-down menu.

The **Select** dialog box opens.

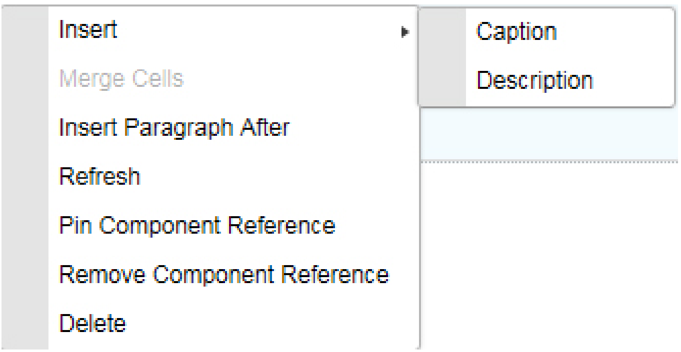


The Select dialog

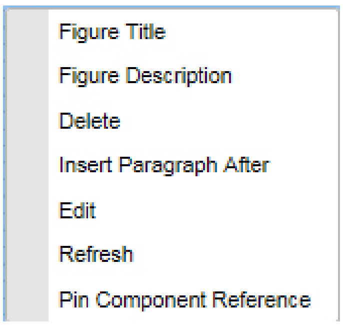
Browse to the desired Excel content and select it.

Editing Microsoft Excel components

Once inserted into the document, you can add captions/titles and descriptions to Excel components using the context menu. Right-click the table or chart:



The Excel table context menu



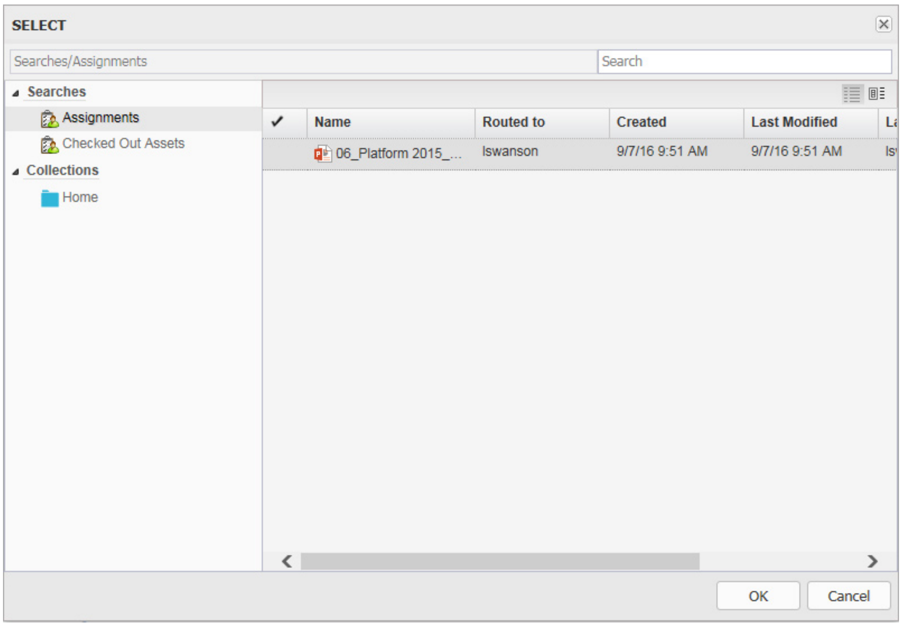
The Excel chart (Figure) context menu

Inserting PowerPoint slides

The Web Editor allows you to insert one or more PowerPoint slides into your document. Slides are inserted as image components in the document.

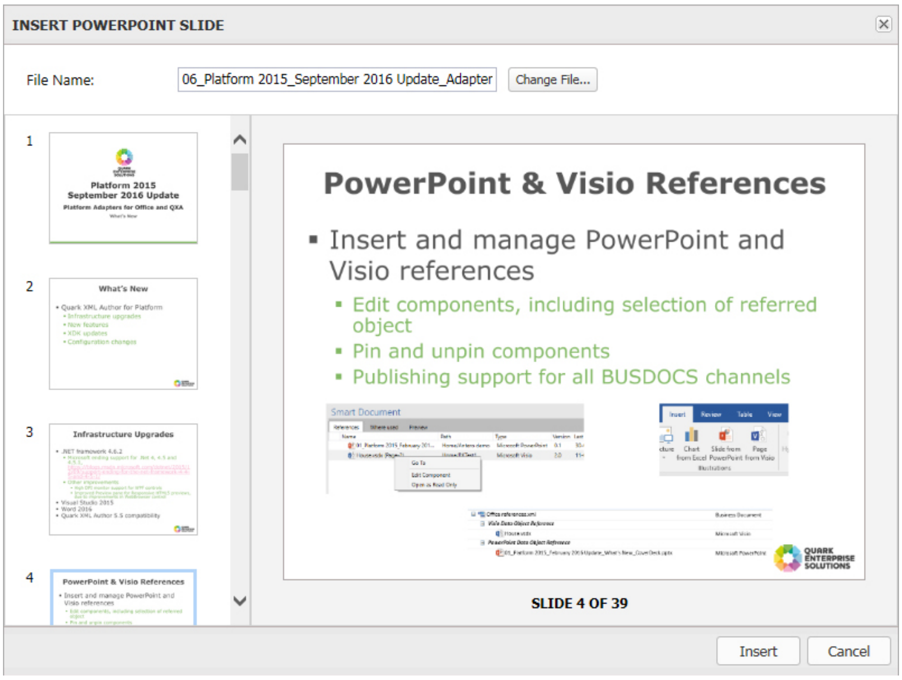
To insert a PowerPoint slide from the Platform repository:

1. Click the **Insert PowerPoint** toolbar button on the **INSERT** tab. The **Select** dialog displays:



The Select dialog box

2. Browse to the desired PowerPoint presentation, select it and click **OK**. The **INSERT POWERPOINT SLIDE** dialog displays:



3. Select the desired slide and click **Insert**. The slide will be inserted into the document.

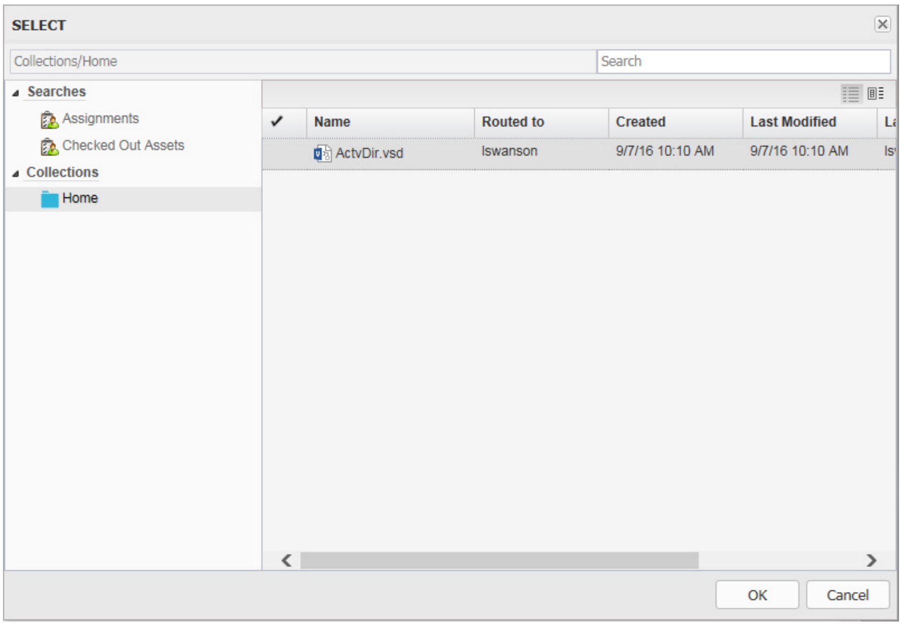
➡ Use the **Change File** button to select a different PowerPoint presentation.

Inserting Visio pages

The Web Editor allows you to insert one or more Visio pages into your document. Pages are inserted as image components in the document.

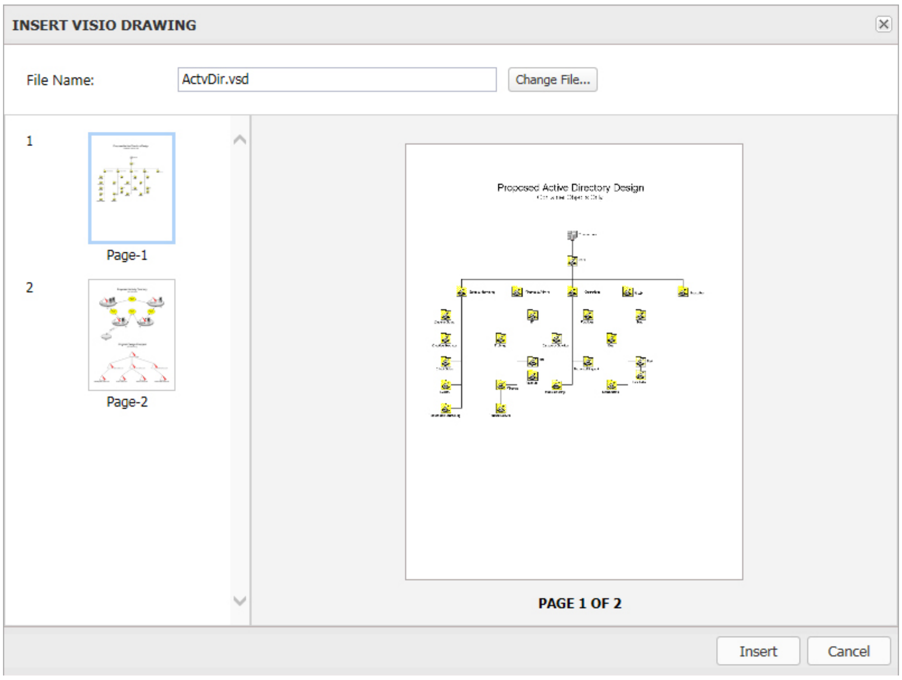
To insert a Visio page from the Platform repository:

1. Click the **Insert Visio** toolbar button on the **INSERT** tab. The **Select** dialog displays:



The Select dialog box

2. Browse to the desired Visio file, select it and click **OK**. The **INSERT VISIO DRAWING** dialog displays:



3. Select the desired page and click **Insert**. The page will be inserted into the document.

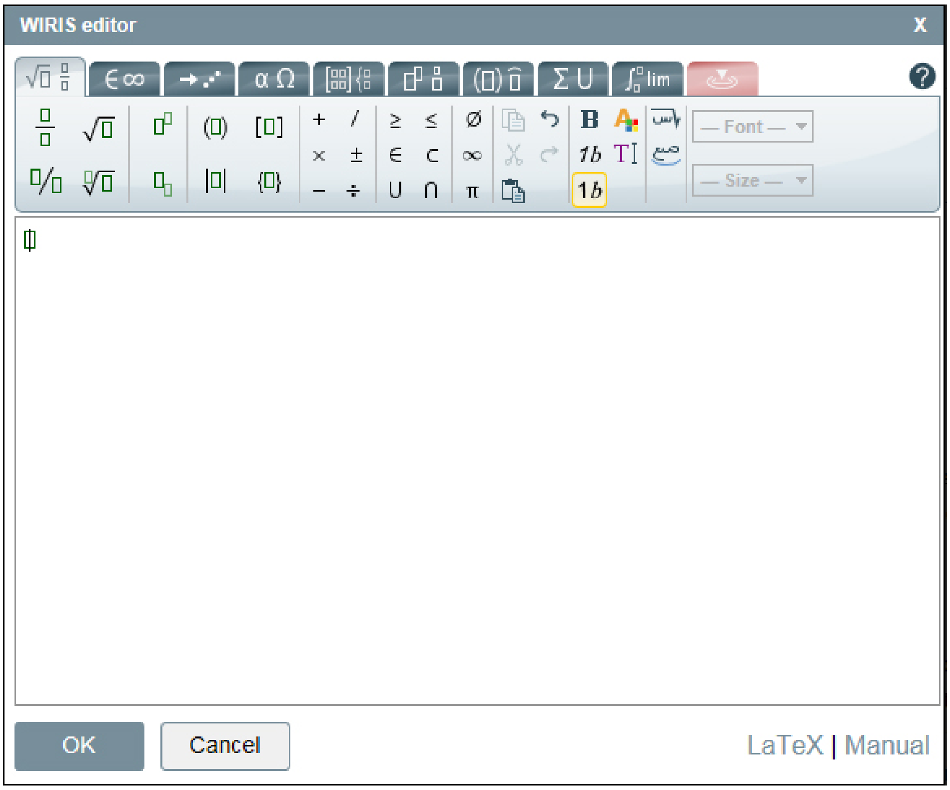
Equation editing

Quark Author Web Edition has integrated with the Wiris Equation Editor to allow you to insert and edit math equations in your document.

➡ This feature is disabled in the default configuration. Configuration changes are required to enable this plugin. See the Quark Author Web Edition System Administration Guide for details on enabling this plugin.

To launch the WIRIS editor:

- To insert a new equation, click the **Math Editor** (√) toolbar button on the **INSERT** tab.
- To modify an existing equation, double-click the equation or select it and click the **Math Editor** (√) toolbar button on the **INSERT** tab.



➡ You can only edit equations in the WIRIS editor, you cannot edit them on the Quark Author Web Edition canvas. How the equation is rendered on the canvas is also controlled by the WIRIS editor. You cannot apply any formatting to the equation manually.

➡ Equation editing is not available in WebSphere and WebLogic.

Indexes

An index lists the keywords, terms and topics in a document, along with the pages that they appear on, allowing a reader to find them within your document instantly and easily.

Quark Author Web Edition allows you to define index items. The index generated from these terms can be seen in the PDF preview.

You can create an index term:

- for an individual word or phrase.
- for an individual table, image, figure or component.
- for a section or sub-section that spans a range of pages.
- that refers to another index term, such as "Transportation. *See* Bicycles".

Managing index terms

The upper section of the **Index** tab lists the index terms in the document as well as the number of occurrences for each index term.

Creating index terms

Use the **Index** tab on the **Right** pane to create index terms.

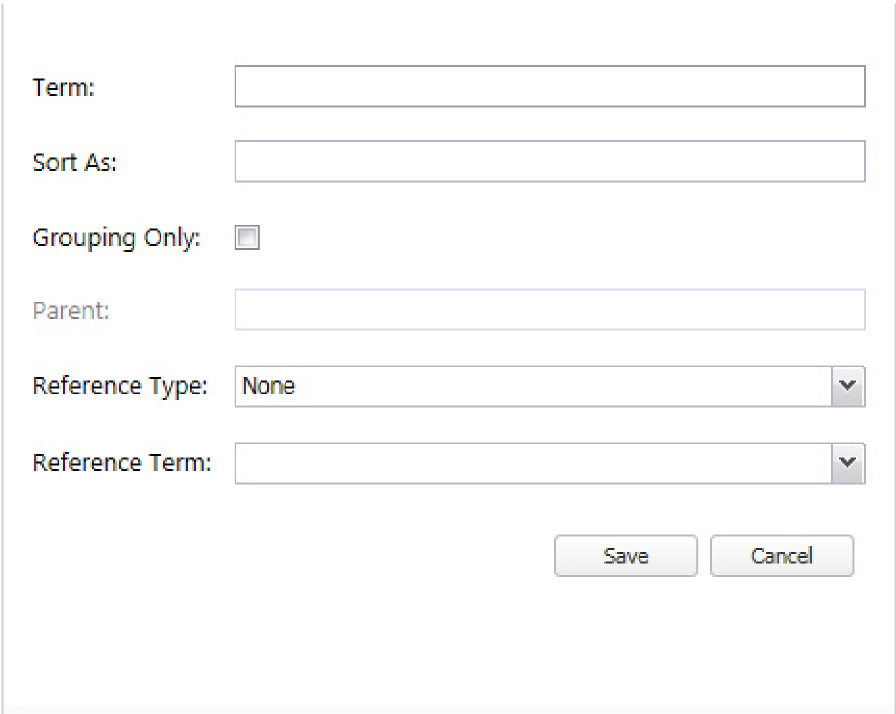
To add an index term to your document:

1. In the document, select what you want to be the index term.

    - If you place the cursor in any part of a section or sub-section title and add it as an index term, the entire section or sub-section will be marked as an occurrence.
    - If you place the cursor within a section or sub-section, the entire paragraph will be marked as an occurrence.
    - If you want the index term to be an individual word or phrase, select the word or phrase. If the phrase is four words or fewer, the **Phrase** tag type will be applied to the word or phrase and just that word or phrase will be marked as an occurrence. If the phrase is longer than four words, the entire paragraph containing the words will be marked as the occurrence.

    ➡ You can also manually tag the word or phrase using the **Tag Types** drop-down menu before adding it as an index. This allows you to have a phrase longer than four words.

2. Click the + **Add Term** toolbar button.



    - The **Term** field will automatically be filled with the word or phrase you selected in the document. You can overwrite this with your own text.
    - The index terms will automatically be placed in alphabetical order (according to the first letter of the index term) in the finished document. If you want the index term to appear at a different place, enter that in the **Sort As** field. For instance, if you want the index term `User Interface` to appear under `I` instead of `U`, enter `I` in this field.

- Check **Grouping Only**, if you want to use this term just for grouping other index terms. **Grouping Only** terms will not have any occurrences associated with them.
- If you are adding a child element, the **Parent** field will contain the index term of the parent element.
- In **Reference Type**, choose a reference type from the drop-down menu. To create a reference that refers to another entry, choose **See** or **See also**. This field can be used if you want to cross-reference other index terms with the current index term.
- When creating a reference that refers to another, choose the term you want to refer to from the list of existing terms in the **Reference Term** drop-down menu. Use this field to select index terms you want to be cross-referenced with the current term. You can select one or more index terms from the drop-down list.

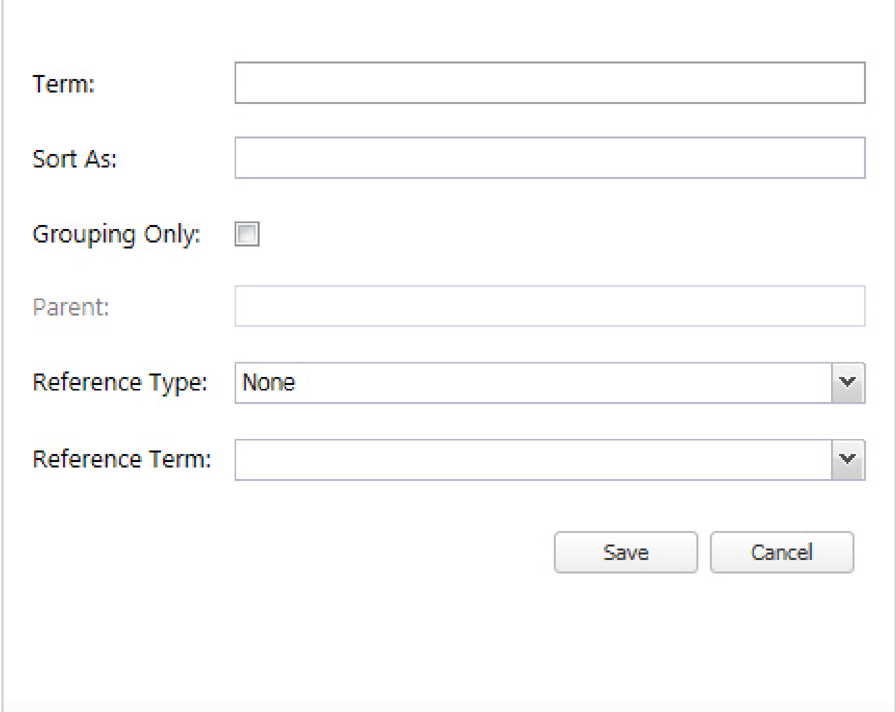
3. Click **Save**. The index term is added and appears in the list of index terms. One occurrence of the index term is listed in the **Occurrences** section of the **Index** tab.

Adding a child term

This option can be used to add a new index term as a child to an existing index term.

To add a child term to an existing index term:

1. Select an existing index term from the list of terms on the **Index** tab.
2. Select the word or phrase in the document that you want to add as a child term to the selected index term.
3. Click the **Add Child Term** toolbar button.



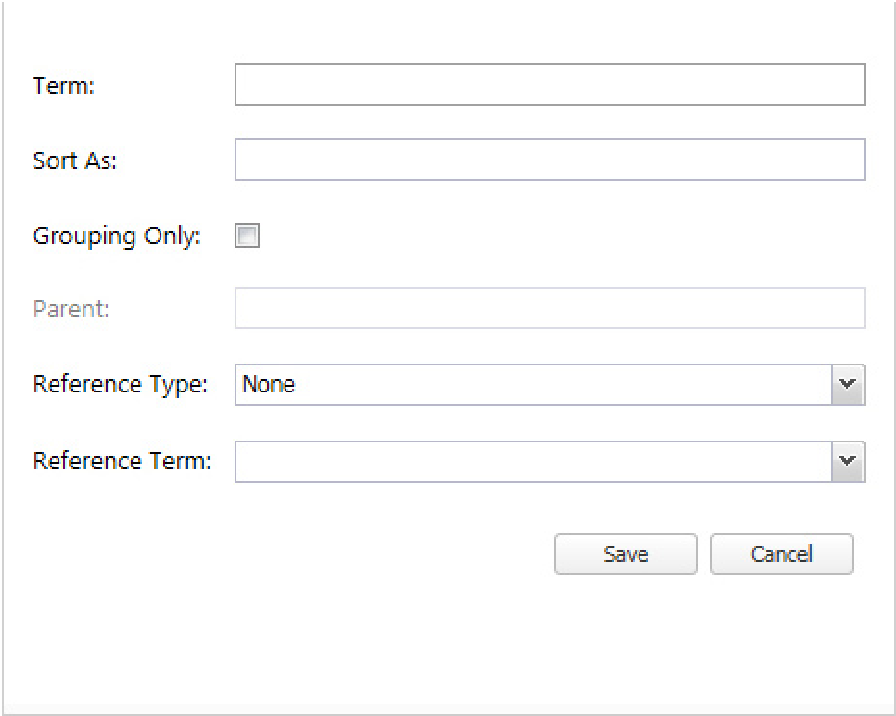
The **Term** field will automatically be filled with the word or phrase you selected in the document. You can overwrite this with your own text. Fill out the other fields as described in "*Creating index terms*".

4. Click **Save**. The index term is added as a child term and appears in the list of index terms. One occurrence of the index term is listed in the **Occurrences** section of the **Index** tab.

Editing an index term

To edit an existing index term:

1. Select an existing index term from the list of terms on the **Index** tab.
2. Click the **Edit Term** toolbar button or double-click on an index term.



3. Make desired changes and click **Save**.

Deleting an index term

To delete an existing index term:

1. Select an existing index term from the list of terms on the **Index** tab.
2. Click the **Delete Term** toolbar button.
3. The term and all of its occurrences will be deleted.

➡ Deleting a parent term will also delete all of its child terms.

Managing occurrences of index terms

The lower section of the **Index** tab lists all the marked occurrences of the index terms in the document.

When a new index term is added, it will have one occurrence by default. You can add multiple occurrences to the same index term if needed.

Adding occurrences

To add an occurrence to an existing index term in your document:

1. Select an existing index term from the list of terms on the **Index** tab.
2. Select the section, word or phrase in the document that you want to be marked as an occurrence of the selected index term.
   - If you place the cursor in any part of a section or sub-section title and add it as an index term, the entire section or sub-section will be marked as an occurrence.

- If you place the cursor within a section or sub-section, the entire paragraph will be marked as an occurrence.
- If you want the occurrence to be an individual word or phrase, select the word or phrase. If the phrase is four words or fewer, the **Phrase** tag type will be applied to the word or phrase and just that word or phrase will be marked as an occurrence. If the phrase is longer than four words, the entire paragraph containing the words will be marked as the occurrence.

➡ You can also manually tag the word or phrase using the **Tag Types** drop-down menu before adding it as an index. This allows you to have a phrase longer than four words.

3. Click the **Add Occurrence** toolbar button.
4. The occurrence will be added.

Deleting an occurrence

To delete an existing marked occurrence of an index term:

1. Select an existing index term from the list of terms on the **Index** tab.
2. Select the marked occurrence of the index term that you want to delete.
3. Click the **Delete Occurrence** toolbar button.
4. The marked occurrence of the selected index term will be deleted.

➡ Deleting all occurrences of an index term will delete the index term as well.

Managing the scope

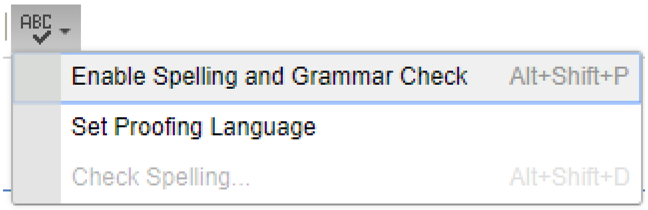
You can increase or decrease the scope of the occurrence. For instance, if you marked an entire section in the document as an occurrence of an index term, and only want to point to a single paragraph instead, you would want to decrease the scope of the occurrence.

To increase or decrease the scope of an existing marked occurrence of an index term:

1. Select an existing index term from the list of terms on the **Index** tab.
2. Select the marked occurrence of the index term that you want to edit.
3. You can increase or decrease the scope of the occurrence:
   - To increase the scope, click the **Increase Scope** toolbar button.
   - To decrease the scope, click the **Decrease Scope** toolbar button.

Spelling and grammar check

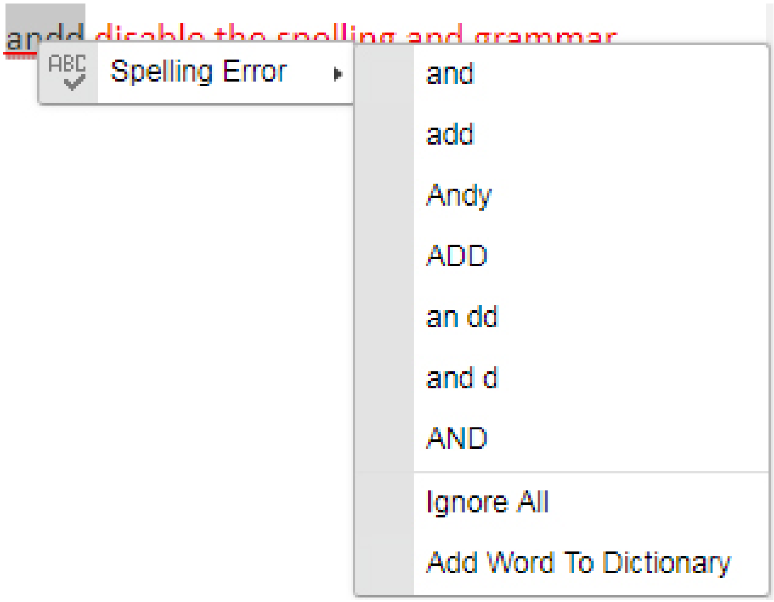
Use the **Spelling and Grammar** drop-down menu on the **REVIEW** tab to enable and disable the spelling and grammar check, to set the proofing language for the spelling and grammar check and to display the **CHECK SPELLING d**ialog.

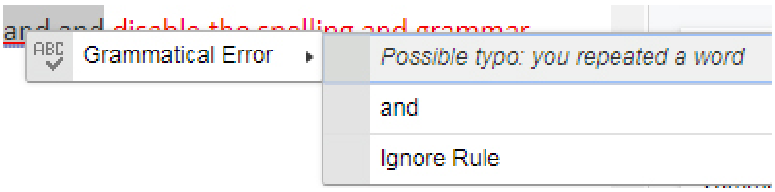


Enabling spelling and grammar check

When the spelling and grammar check is enabled, misspelled words and grammatical errors will be underlined in the text. Spelling errors appear in red and grammatical errors appear in blue.

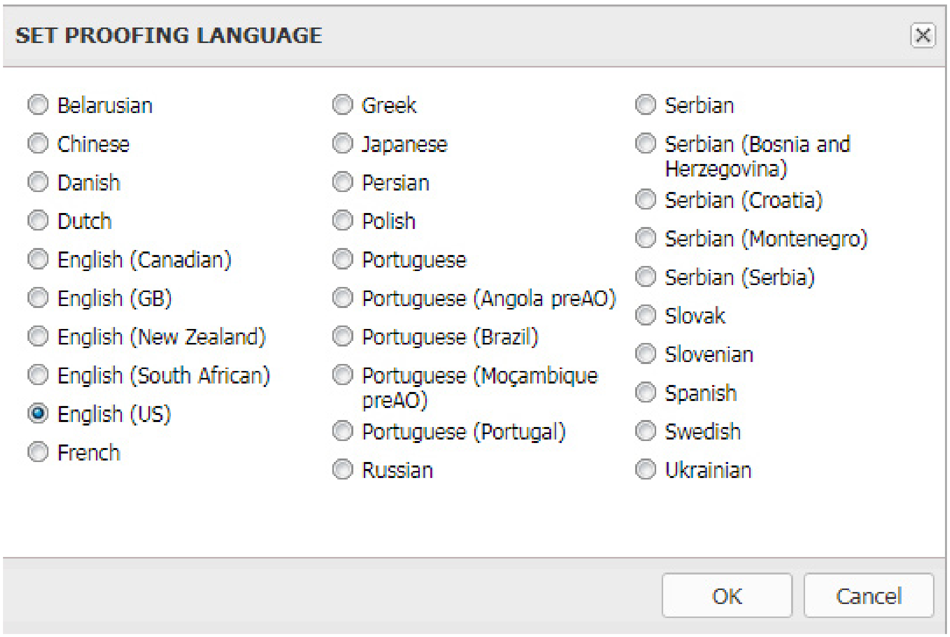
Right click on the underlined word/section to reveal and correct the error:





Setting the proofing language

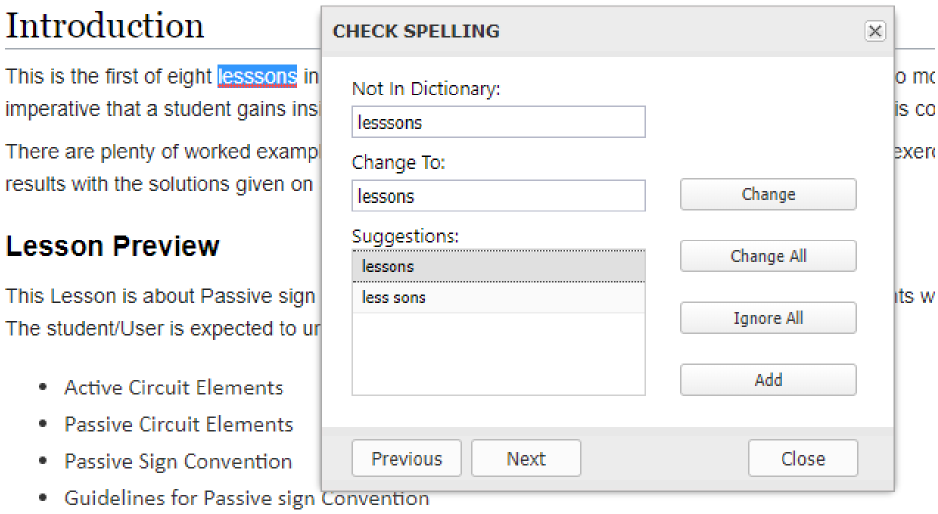
Choose **Set Proofing Language** from the drop-down menu and select from over thirty default languages.



The default proofing language is automatically selected based on Platform Workspace locale settings used when logging in. Additional languages are available via configuration. See the *Quark Author Web Edition System Administration Guide*.

The CHECK SPELLING dialog

Choose **Check Spelling** from the drop-down menu to display the **CHECK SPELLING** dialog.



The dialog displays the first misspelled word and a list of suggestions for the misspelled word.

- Select an option from the list of suggestions and click**Change** to replace this occurrence of the misspelled word, or **Change All** to replace all occurrences within the document of this misspelled word.

- Click **Ignore All** to ignore all occurrences of the misspelled word.
- Click **Add** to add the word to the dictionary.
- Click **Next** to navigate to the next occurrence of the misspelled word.
- Click **Previous** to navigate to the precious occurrence of the misspelled word.
- Click **Close** to close the **CHECK SPELLING** dialog.

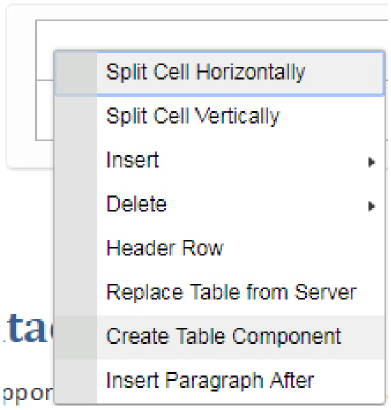
Content components

Tables and Regions can be saved as reusable components.

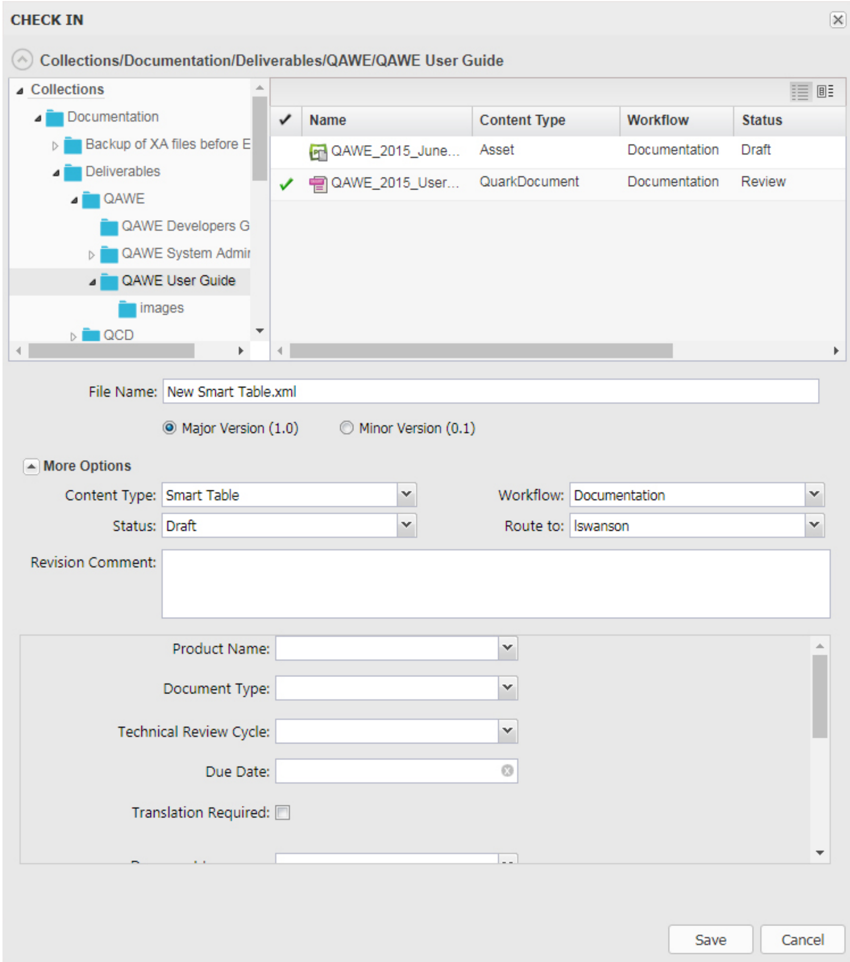
Create a component

To create a component:

1. In the **Editing** pane, right-click on the table or region you want to make into a reusable component.



2. Choose **Create Table Component** or **Create Region Component** from the context menu. The **CHECK IN** dialog box displays.



3. Specify a file name and location for the component.

4. Fill out the remaining fields with the appropriate data and click **Save**.

➡ The content will be saved as a separate .xml file in the specified location. You now have a reusable component that can be included in other smart documents by using the **Insert Table from Server** or **Insert Region from Server** options on the **INSERT** tab.

Insert a component

To insert a previously saved table or region component into your smart document:

- If the component will be new content:
  1. Place your cursor in the document where you want to insert the component, click the **Insert Table from Server** or the **Insert Region from Server** button on the **INSERT** tab. The **Select** dialog box displays.
  2. Search or Navigate to locate the component.
  3. Select the component and click **OK**.
- If the component will replace existing content:
  - Right-click the table or region to replace and choose **Replace Table from Server** or **Replace Region from Server**. The **Insert** dialog box displays.

- Search or Navigate to locate the component.
- Select the component and click **OK.**

Edit a component

To edit source content in a component, the component must be open for editing. The following two icons indicate the editing status for a table or region component:

- - This indicates the component is checked out and available to edit.
- - This indicates the item is locked and not available for editing.

If the component is not open for editing, right-click on the component and choose **Edit Component** from the context menu. You will now be allowed to edit the content.

When you have finished editing, right-click on the component and choose:

- **Save Component** to save your changes and leave the component open for editing.
- **Save and Close Component** to save the changes and lock the component from editing.
- **Discard Changes** to discard any changes and return the component to its last saved state.

Contacting Quark

Our support team is available to answer all your questions about Quark products including QuarkXPress and Quark Enterprise Solutions. Check out our online knowledge base, documentation site and forums for instant answers 24x7.

For more details, please check out our support website *support.quark.com*

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