A Guide to Office Adapters for Quark Publishing Platform 2015 - October 2017 Update

Contents

Getting started

This supplement to *A Guide to Quark Publishing Platform* describes the functionality that the Office Adapter for Quark Publishing Platform® adds to Microsoft® Word, Excel, PowerPoint and Visio.

Using these plugins, a user can:

- store all Word, Excel, PowerPoint and Visio documents on Quark Publishing Platform using version control.

- use a Quark Publishing Platform workflow to assign status and route Microsoft Word, Excel, PowerPoint and Visio digital assets.

- create new Word, Excel, PowerPoint and Visio files from existing files or templates checked-in to the Quark Publishing Platform server.

- create components from existing local Excel files and check in the components to the server.

- insert components from the Quark Publishing Platform server in PowerPoint slides.

About Quark Publishing Platform

Quark Publishing Platform is a highly configurable solution for complete, automated, end-to-end multichannel publishing. Quark Publishing Platform is purpose-built to support end-to-end publishing needs, from complete manual publishing systems to highly automated workflows.

Platform consists of a set of core modules that can be combined in various ways and integrated with third-party systems to accommodate almost any workflow. Its capabilities can be described in terms of content creation, management, publishing, and delivery.

Create

Quark Publishing Platform lets you:

- design professional templates for different publications.

- author structured content in the familiar Microsoft Word environment.

- integrate content from databases with other forms of content.

- utilize multimedia content such as video, audio, images, and slideshows.

Manage

Quark Publishing Platform provides:

- workflow and collaboration tools.

- task and update notifications.

- component management.

- automated checks.

- version control.

Publish

With Quark Publishing Platform, you can:

- automatically assemble components of various types from various sources into sophisticated layouts.

- automatically publish layouts in a variety of formats for a variety of devices.

Deliver

The automation features built into Quark Publishing Platform make it easy for you to deliver content to your content consumers in both public and secure environments.

System requirements

The Office Adapters for Quark Publishing Platform require the following minimum hardware configuration:

- Processor: Intel Core i5, 2.5 Ghz (Intel Core i7, 3.4 Ghz recommended)

- 8 GB of RAM (16 GB recommended)

- 10 GB of available hard disk space

- Display with 1024 x 768 or higher resolution monitor

- Peripherals suitable for Microsoft® Office authoring

- DVD-ROM drive for installation from DVD (not required for installation from download)

The Office Adapters for Quark Publishing Platform require the following minimum software configuration:

- Windows 7® 32-bit (Enterprise, Professional or Ultimate)

- Windows 7® 64-bit (Enterprise, Professional or Ultimate)

- Windows 8® 32-bit

- Windows 8® 64-bit

- Windows 8.1® 32-bit

- Windows 8.1® 64-bit

- Windows 10® 32-bit

- Windows 10® 64-bit

The Office Adapters for Quark Publishing Platform require one of the following versions of Microsoft® Office:

- Microsoft Office 2010 32 bit, Professional Edition.

- Microsoft Office 2013 32 bit, Professional Edition (Build 4849.1000 or later).

- Microsoft Office 2016 32/64 bit, Professional Edition (Deferred Channel: Version 1602, Build 6741.2071. Released on September 13, 2016).

- Microsoft Office 365 (2013 and 2016) 32/64-bit

➡ Office Adapters for Quark Publishing Platform - Visio only supports Microsoft Visio 2013 and 2016.In addition, the following components are required for installation:

- Microsoft .NET Framework 4.7 or later. It is available for download at Microsoft's Download Center: https://www.microsoft.com/en-us/download/details.aspx?id=55167

Once the required installation of Office is complete, you may install the Office Adapters for Quark Publishing Platform.

Installing the Office Adapters for Quark Publishing Platform

Installing the Office Adapters for Quark Publishing Platform is a straightforward process. The installation wizard will guide you through each step of the process. These adapters can either be installed using a standard installer that installs all the selected adapters in one go, or using the **ClickOnce** installation method that can be run from your Quark Publishing Platform landing page. The **ClickOnce** installation method has the added advantage of allowing updates to be managed and pushed to the user by the server administrator, ensuring that all users use the same version of the adapter.

Before you begin to install the Office Adapters for Quark Publishing Platform, be certain that all required software including Microsoft Office have already been installed. Also, run Office Updates at Microsoft.com to ensure the latest version is installed. Close all running instances of Microsoft Office.

ClickOnce Installation

To install the Office Adapter for Quark Publishing Platform using the **ClickOnce** installer:

1. Ensure that you have internet access. If any of the common Microsoft libraries are not installed on your system, the installation process attempts to download them.

➡ If previous versions of the Office Adapter for Quark Publishing Platform have been installed from the same **ClickOnce** location, the Office application will auto update on launch.

➡ If previous versions of the Office Adapter for Quark Publishing Platform have been installed from a location other than the current **ClickOnce** location, use Control Panel to uninstall all previous versions.

2. Open the Quark Publishing Platform installation landing page in the browser.

➡ This section on the Quark Publishing Platform landing page will only be available if Platform Adapters for Microsoft Office components have been configured for web sharing. For further information on setting up the Platform Adapters for Microsoft Office components for web sharing, see the *Quark Publishing Platform System Administration Guide*.

3. Select the Microsoft Office product for which you wish to install the Platform Adapter
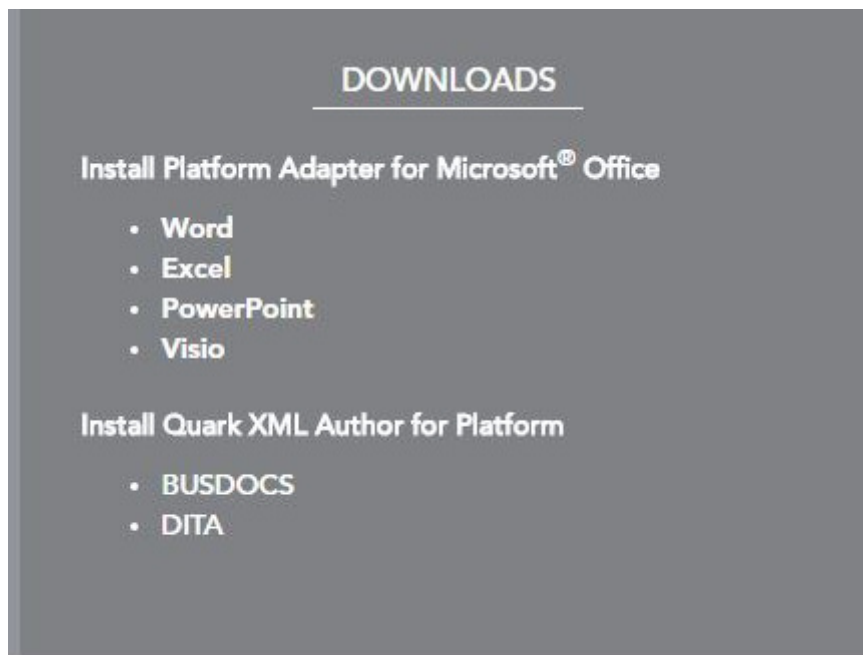
4. Click **Download and Install.**

5. Click **Accept and Install** to accept the terms of the license agreement.

6. Double-click the **setup.exe** file and follow the instructions on the screen. Office Adapters for Quark Publishing Platform have been successfully installed.

➡ This installation method will only install the Platform Adapter for the selected Office product. The installation needs to be repeated for each product that requires the adapter.

➡ Updates to the installed version of the adapters will be installed automatically on launch.

Standard Installation

To install the Office Adapter for Quark Publishing Platform using the Windows installer:

• From the installation media, double-click the **setup.exe** file and follow the instructions on the screen. Office Adapters for Quark Publishing Platform have been successfully installed.

➡ If previous versions of the Office Adapter for Quark Publishing Platform have been installed, use **Control Panel** to uninstall all previous versions and patches.

➡ Updates for each of the adapters need to be installed manually.

System setup and preferences

The System Setup and Preferences section provides details on connecting to the repository and specifying user preferences.

➡️ Some preferences are not modifiable when a server connection is currently established. In that case, close all open documents and then try again.
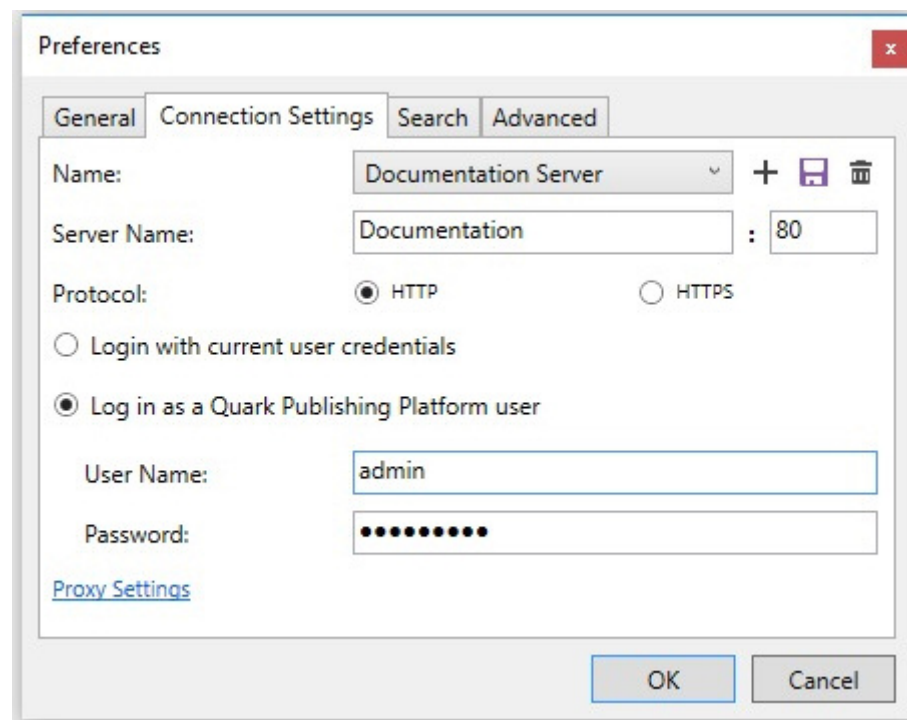
Logging on to the repository

To use repository features such as Check In (Save) or Check Out (Open), you must be logged on. Set your log on information so that the system can automatically log you on.

If you do not have the log on information, please contact your system administrator.

To specify log on information:

1 Choose **File > Open > Quark Publishing Platform > Preferences**.

2 Click the **Connection Settings** tab.

3 Specify the repository log on information provided by your system administrator.

➡️ If you do not specify log on information, then the credentials of the user that is logged on to the machine are used.

4 Click + to add a connection name.

5 If you have edited any of the connection settings, Click the **Save** icon to save the settings.

6 Click **OK**.

➡️ You can now save multiple server settings by choosing +, entering a new name for the settings, editing the existing values and clicking the Save button. Unwanted settings can be removed using the **Delete** button.

➡️ You can select the required server from the **Name** drop-down list.

Your log on information is set.

Platform Adapter for Microsoft Office preferences

You can use the Preferences tab of the **File** menu (**File > Preferences**) to set your Quark Publishing Platform Adapter for Microsoft Office preferences.

All other Quark Publishing Platform preferences are stored on the Quark Publishing Platform server.

The General tab

The **General** tab of the **Preferences** dialog box allows you to specify the local folder that documents you check out will be located in. The **Deletion Options** drop-down menu displays the following deletion options:
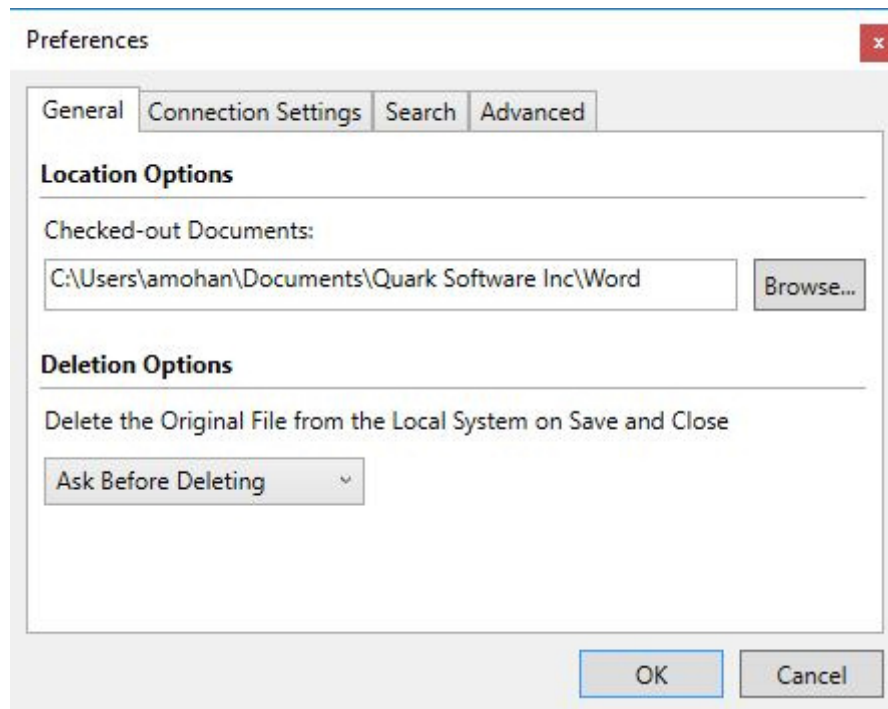
- **Ask Before Deleting**: to display an alert each time you attempt to delete a checked-out document.

- **Never Allow Deletion**: to protect against deleting checked-out documents.

- **Delete Without Warning**: to delete checked-out documents without displaying a warning.

General tab of the **Preferences** dialog box.

The Connection Settings tab

The **Connection Settings** tab of the **Preferences** dialog box allows you to specify the connection settings for Quark Publishing Platform. To specify connection

settings:
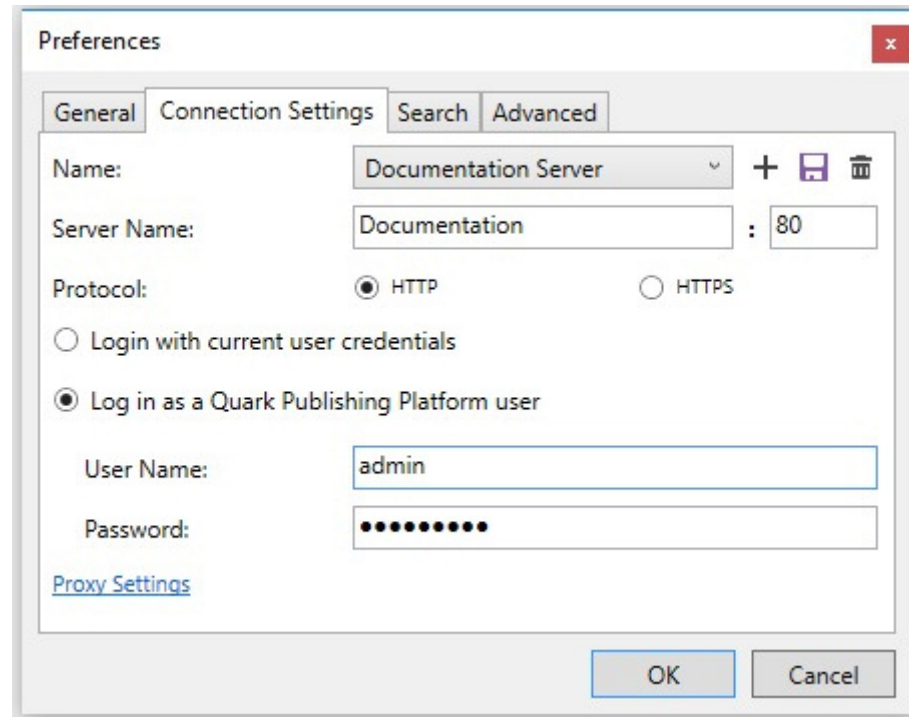
The Connection Settings tab of the Preferences dialog box

- Enter the Quark Publishing Platform server's IP address or name and port number in the **Server Name** fields.

- The **Protocol** controls let you choose whether to use HTTP or HTTPS for communication with Quark Publishing Platform server.

➡ If you're not sure which setting to use, ask your Quark Publishing Platform administrator

- You can choose to automatically log on with your current user credentials, or you can choose to provide your log on credentials by specifying a user name and password.

- The values in the **User Name** and **Password** field are defined for each user by the Quark Publishing Platform administrator. For Quark Publishing Platform sites that use Lightweight Directory Application Protocol (LDAP) to manage user lists, Quark Publishing Platform users log on with their network user names and passwords. Log on passwords may or may not be case-sensitive, depending on the Quark Publishing Platform administrator's specifications. These values can also be saved by specifying a name for them in the **Name** field.

The Search tab

The **Search** tab of the **Preferences** dialog box enables you to specify the search settings and to control how revision comments are displayed.

The **Search** tab of the **Preferences** dialog box

The **Search Options** allows you to specify what to search for. The drop-down menu displays the following options:

- Name

- Content

- Name and Content

Revision Comments allows you to specify when to display revision comments.

The drop-down menu displays the following options:

- Always

- Never

- New Assignments Only

Working with the Platform repository

Creating a new document from a repository template

You can create new documents from an existing repository template.

You can create documents from "templates" that contain the minimum required elements and attributes for a given document type. Documents may also contain custom guidance text or instructions.

1. Choose **File** > **New Document from Server**

2. In the **Available Templates** menu, choose **New Document from Server Template.**
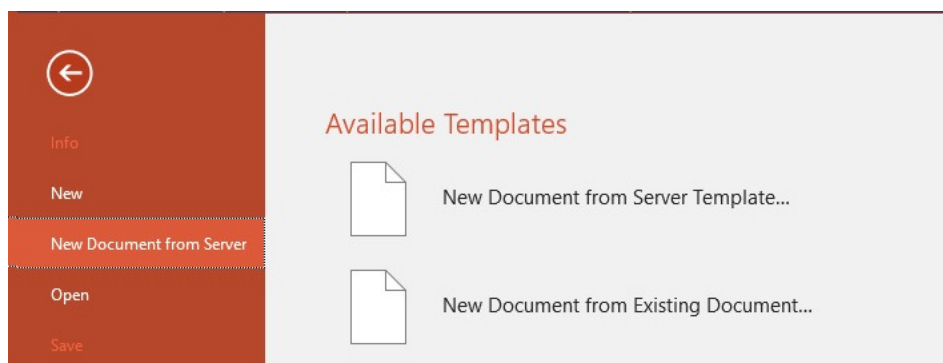
The **Select Template** dialog displays.

3. Navigate to the repository folder that contains the desired template. Or, in the dialog box, use the Quick Search feature to locate the desired document.

   • To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.
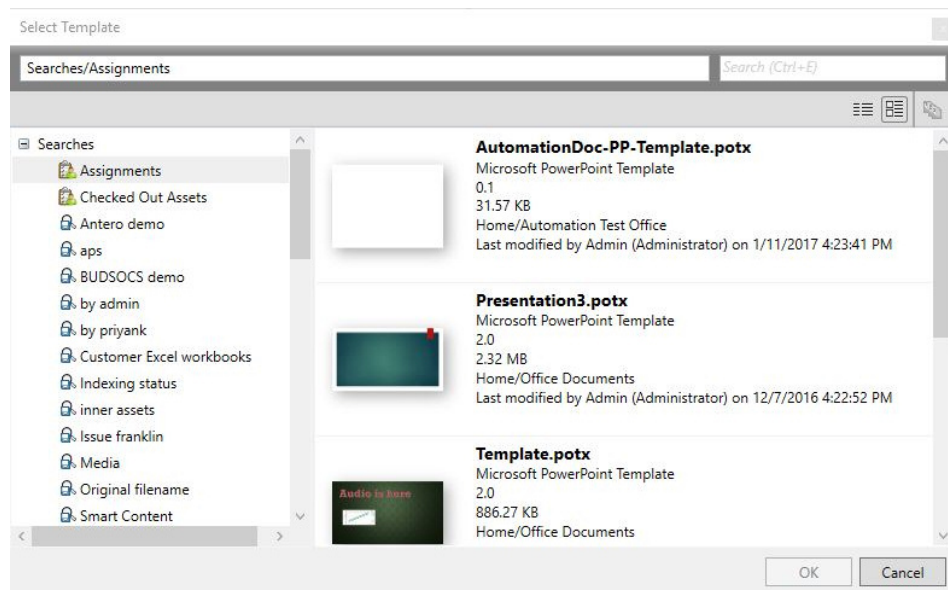
The search results are displayed.

➡ You can choose to view the results in either ▤ list view or ▦ snippet view. The Quark Publishing Platform server manages version control for checked-in documents. The revision history of an asset can be viewed and an older version can be opened by selecting the asset and clicking 🗗 **View Revisions**.

4. Select the template.

5. Click **OK.**

To create a new document:

The document is created and is ready for authoring. When you are finished authoring, save the document to the repository.
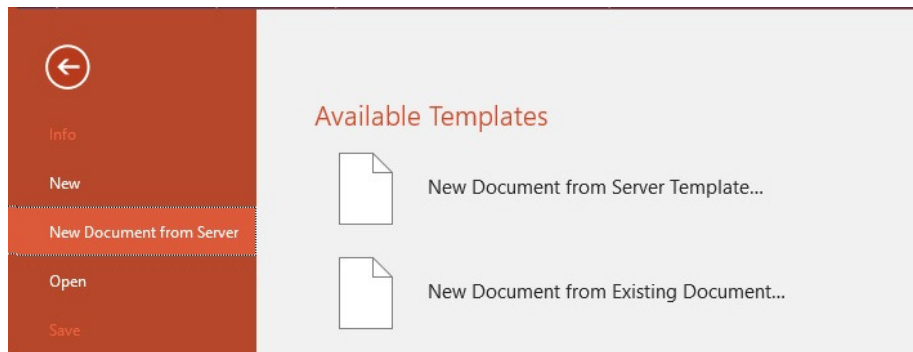
Creating a new document from an existing document

You can create new documents from existing documents available in the Platform server repository.

To create a new document:

1 Choose **File > New Document from Server.**

2 In the **Available Templates** menu, choose **New Document from Existing Document**.

The **Select Document** dialog displays.

3 Navigate to the repository folder that contains the desired document. Or, in the dialog box, use the Quick Search feature to locate the desired document.

• To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.
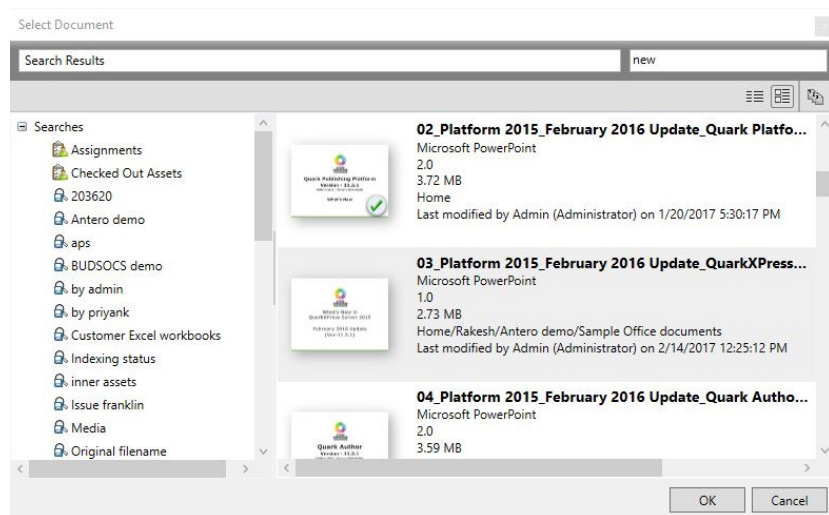
The search results are displayed.

➡ You can choose to view the assets in either ▤ list view or ▦ snippet view. The Quark Publishing Platform Server manages version control for checked-in documents. The revision history of an asset can be viewed and an older version can be opened by selecting the asset and clicking ▤ View Revisions.

4 Select the document.

5 Click **OK**.

The document is created and is ready for authoring. When you are finished authoring, save the document to the repository.

Opening a repository document for viewing

You can open repository documents from any Office application that has the adapter installed.

To open a document for viewing:

1. Choose **File > Open from Server**

2. In the **Open from Server** dialog box, navigate to the repository folder that contains the desired document.

Or, in the dialog box, use the search feature to locate the desired document.

- To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.
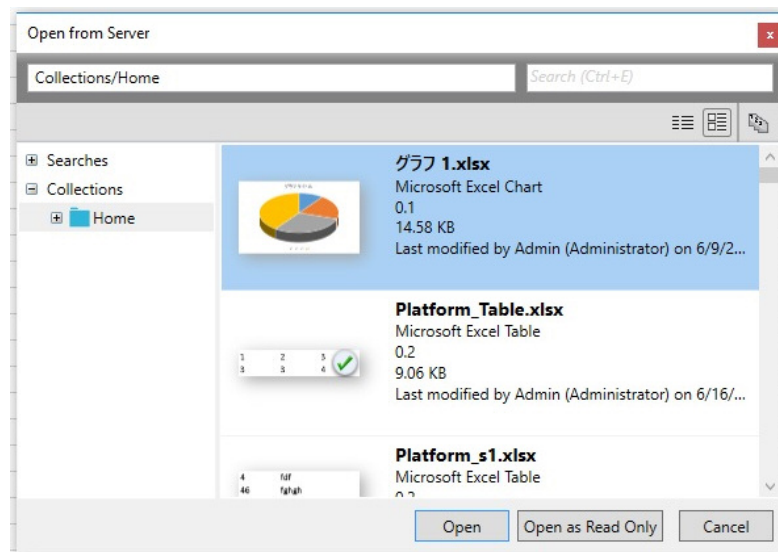
- To use an existing search, the **Searches** folder displays all Saved and Shared Searches stored at the repository. Select the desired search.

➡ You can choose to view the results in either ☰ list view or ⊞ snippet view. The Quark Publishing Platform server manages version control for checked-in documents. The revision history of an asset can be viewed and an older version can be opened by selecting the asset and clicking ⧉ **View Revisions**. Earlier versions may only be opened read-only.

3. Select the document.

4. Click **Open as Read Only**.

The document displays, ready for viewing. The view in your repository software and the **Open from Server** dialog show the file without the checked out icon. The **Checked Out by** field remains cleared.

Checking out a document

You can check out and edit documents that are opened for viewing.

The document must already be open in read-only mode in the Office application.

If the currently open document is not the latest version, it will be closed. The latest version will be opened and checked out.
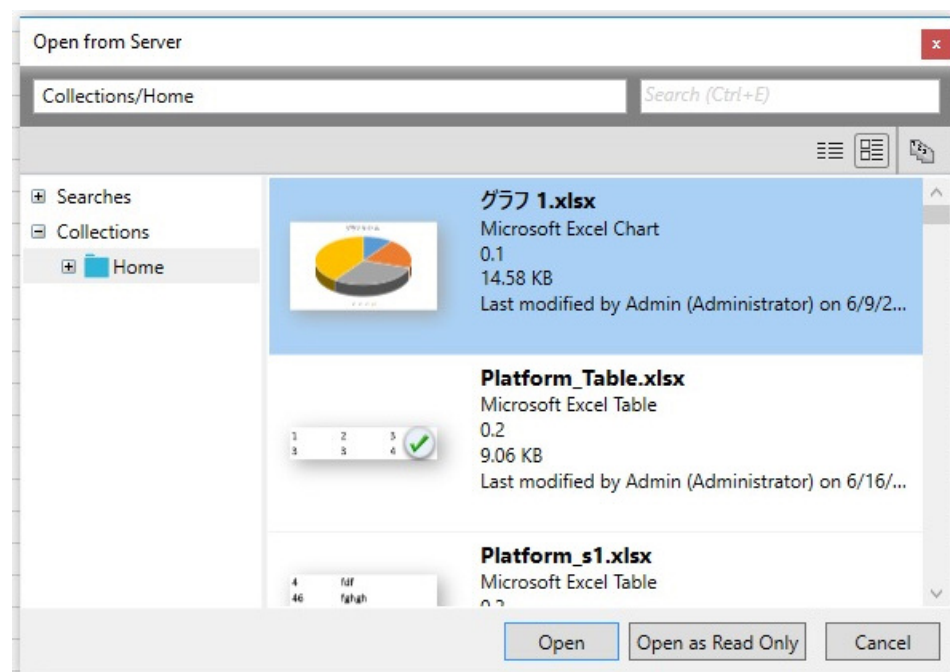
To check out an open document:

- Choose **File > Edit**.

The document is checked out and ready for editing.

You can also check out and edit documents from the Platform server.

1. Choose **File > Open from Server**

The **Open from Server** dialog displays.

2. Navigate to the repository folder that contains the desired document. Or, in the dialog box, use the quick search feature to locate the desired document.

3. Select the desired document and click **Open**.

The document is checked out and ready for editing.

The view in your repository software and the **Open from Server** dialog show the file

with the checked out icon.

The **Checked Out by field** is set to your User Name.

When you are finished authoring, save the document to the repository.

Saving document revisions

You can save and check in a document from the Office application it is open in. Components within the document will be available for referencing by other documents. For new documents, specify the desired repository folder and filename.

You can choose to check in and close the document or keep it checked out and open for further editing.

To save a revision of a document:

1 Perform one of the following:

- To keep the document open: Choose **File > Info > Save Revision to Server**.

- To close documents: Choose **File > Info > Save to Server & Close**.

The **Save** dialog box displays. The dialog box displays repository-related information about the document you are saving.

➡ You are not allowed to change the collection that the document is located in when you are saving a revision. This can only be done when you are doing a Save/Close of a document.

2 If you do not need the **Repository View** it can be collapsed. This is useful if a **Form** view displays which can make the vertical length of the dialog extend beyond the screen.

3 Specify whether to check the file in as a **Major Version** or **Minor Version**.

4 Click **More Options** and modify any other available attribute fields as appropriate.

- For new documents, choose a content type from the **Content Type** drop-down menu.

- From the **Workflow** drop-down menu, choose which workflow should be applied to the document.

- In **Status**, choose the status which should be applied to the document based on your established processes.

- To send the asset to a particular user or group or to **No One**, 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.

- In **Revision Comments**, explain what was changed in the document.

➡ These revision comments are shown when the document is opened for viewing or editing.

- If the dialog box includes a **Form View**, complete the additional fields.

- For new documents, specify the desired repository folder and filename.

- Click **Save**.

The current version of the document is saved to the repository. If you chose to keep the document open, the document status is checked out and the view in your repository software and the **Open** dialog show the file with the checked out icon. ✔

➡ If the document includes validation rules, these are evaluated when you attempt to save the document. The system will notify you of any rules that have been violated. For example, certain fields that are empty that must be completed.

➡ When a document is checked in, any references to local images are converted to server references. These images will be checked in first and then will be related/referenced to the document on the server.

➡ For further information on saving document revisions, setting attribute values and workflows, see the *Quark Publishing Platform Guide.*

Discarding changes and check out

You can use the **Discard Check Out** feature to cancel the checkout of a document. All authoring changes will be discarded.

The document must already be open in the application.
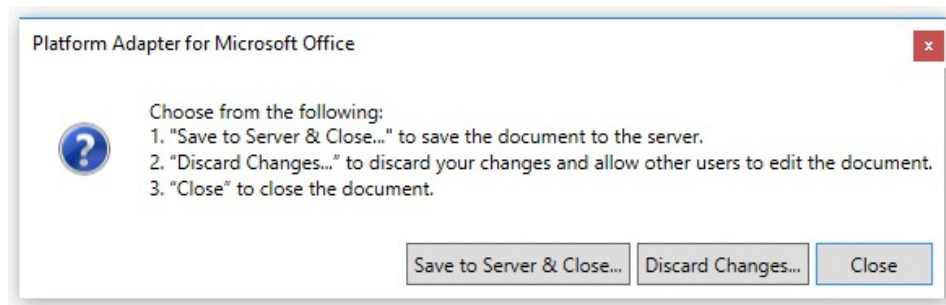
To discard check out:

1 **Choose File > Info > Discard changes**.

2 The system prompts, **Do you want to revert changes?**. Click **Yes.**

Changes made to the document since it was checked out are discarded and the document is closed.

➡ The view in your repository software and the **Open from Server** dialog show the file without the checked out icon. The **Checked Out By** field is cleared. The document status changes from checked out to checked in.

Closing server documents

Documents checked out from the Quark Publishing Platform server need to be saved to the server or saved and closed to preserve any changes made to them locally. Closing the document via a keyboard shortcut, through the **File** menu or by clicking on the **Close** icon on the top right hand corner of the window displays a dialog with the following options:

1. **Save to Server and Close**: Updates the Quark Publishing Platform server with your most current changes, checks in and then closes the project or template.

2. **Discard Changes**: Discards the checkout, closes the project or template and makes it available for others to check out. An alert displays, allowing you to save or discard any changes made since your checkout. If you saved a revision on Quark Publishing Platform Server, it becomes the current version when you cancel a checkout.

3. **Close**: Closes the document. If the document has not been saved, an alert displays, allowing you to save the open document locally. If you choose **Don't Save**, the document is closed with the last saved change. Choosing **Cancel** dismisses the alert.

The Quark Publishing Platform User Interface

Users can access their Quark Publishing Platform workflow through the Office® adapters for Quark Publishing Platform. This chapter provides details of the Quark Publishing Platform user interface available in PowerPoint, Word, Visio and Excel on Microsoft Windows®. For more information about the Quark Publishing Platform user interface, see *A Guide to Quark Publishing Platform.*

The Excel Adapter for Quark Publishing Platform

The Excel Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The Excel Adapter for Quark Publishing Platform currently supports the following formats:

- .xslx (Excel Workbook)

- .xltx (Excel Template)

- .xlsb (Excel Binary Workbook)

- .xlsm (Excel Macro-Enabled Workbook)

Componentization in Microsoft Excel

Componentization in Microsoft Excel is aimed at editorial flows that may require the source documents to be independent of exported components, yet retaining the capability to update them.

Data in Microsoft Excel workbooks can be exported to multiple formats as components. These components can be referenced directly in Quark XML Author, Quark Author Web Edition and Microsoft PowerPoint.

Components can be exported from local Excel workbooks without checking in the source documents to the Platform server, preserving the formatting and content of the source document.

The formatting and content of ranges or charts exported as Microsoft Excel can be altered, although a link to the original document is maintained. If the source requires changes to its structure or content, all linked components can be updated.

Any components that do not require to be linked to the source document can be delinked.

Exporting Ranges from Microsoft Excel

Selected ranges in Microsoft Excel can be exported as various content types. To export a selected range:

1. Select a range of cells.

2. Invoke the contextual menu and choose an option from **Smart Content > Export As >**:
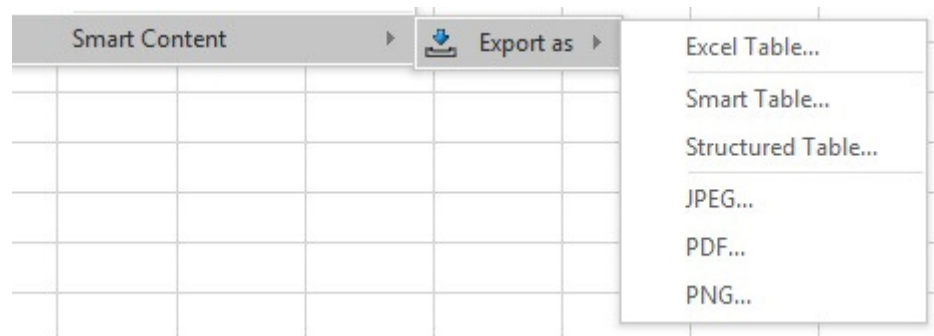
- **Excel Table:** Ranges are exported as a new Excel workbook with all formatting information and values. Formulas and references are not exported.

- **Smart Table:** Exports ranges in the native Quark Author table format.

- **Structured Table:** Exports the selected range in the native Quark XML Author table format.

- **JPEG**: Exports the selected range as an image (jpg).

- **PDF**: Exports the selected range as an image (pdf).

- **PNG:** Exports the selected range as an image (png).

➡ Exporting a range containing a formula or a link will only export its value.

➡ Exporting a range again will change the contextual menu entry to **Smart Content > Export Again As**
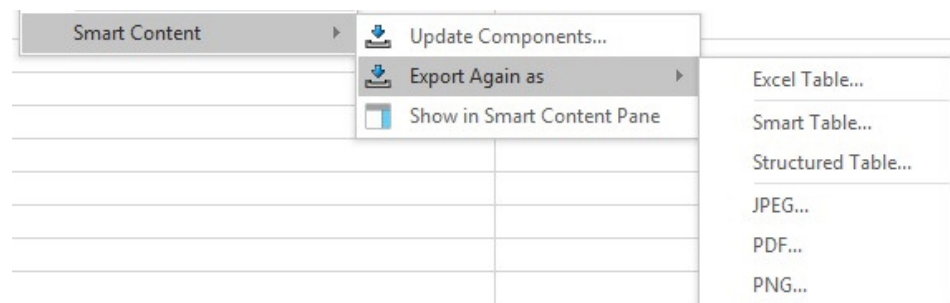

➡ Local edits to the exported Excel table will be overwritten when the components are exported again.

➡ If the Selected range is not named, a dialog to set a name for the exported range will be displayed.

3. Enter a name for the range or use the suggested name. Set the scope of the range. The scope of a range can be limited to the current sheet or made available throughout the workbook. Click **OK**. The **Save** dialog displays.
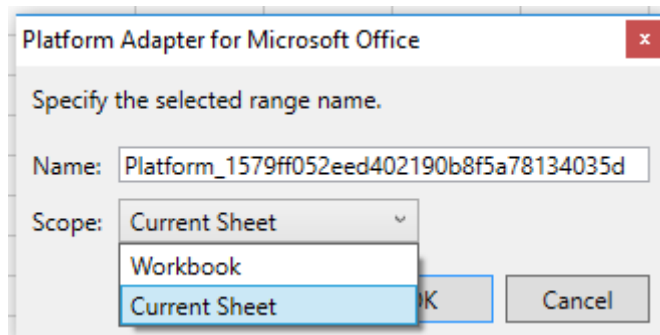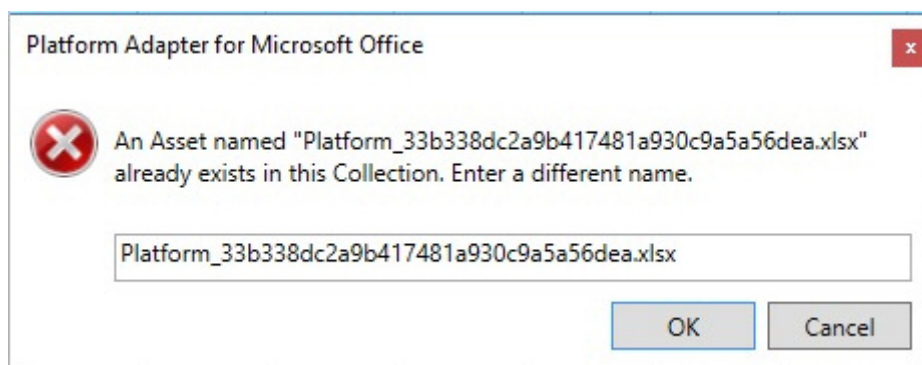

➡ The Name drop-down list only displays ranges with scope set to the current sheet or throughout the workbook.

4. Navigate to the required repository folder and click **Save**.
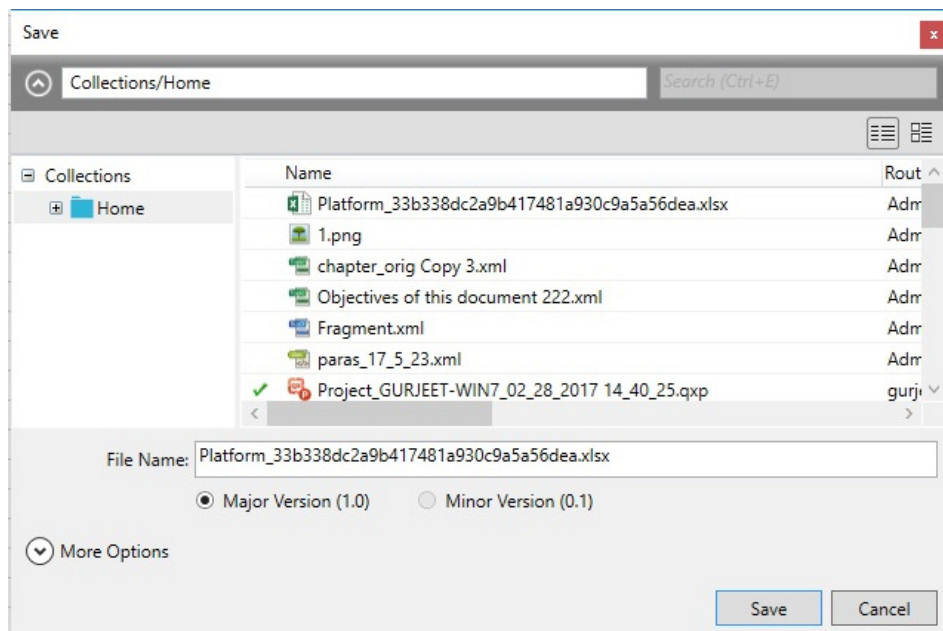
➡ If a component with the same name exists in the destination, an alert with an option to change the name of the asset displays.

The selected range is saved to the server with the specified name.

➡ Exported components contain an attribute with information about the local path of the file from which the component was exported. If changes are required in the original file, the local file can be edited by choosing **Edit Original** from the contextual menu in Quark XML Author.

Exporting Charts from Microsoft Excel

Charts in Microsoft Excel can be exported as various content types.

To export a chart:

1. Select the chart.

2. Invoke the contextual menu and choose **Smart Content > Export As>**
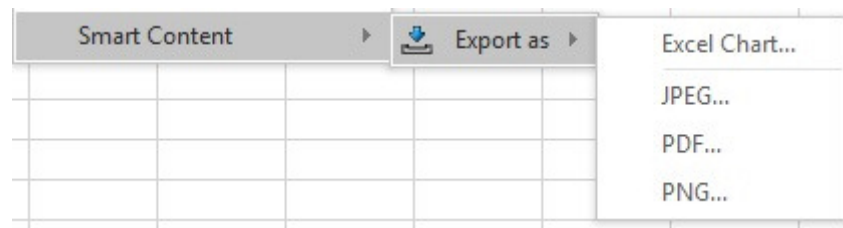
Choose one of the following options:

- **Excel Chart:** Charts are exported as a new Excel workbook with all formatting information and values.

- **JPG:** Exports the selected chart as an image (.jpg).

- **PDF:** Exports the selected chart as an image (.pdf).

- **PNG:** Exports the selected chart as an image (.png).

➡ Exporting a chart again will change the contextual menu entry to **Smart Content > Export Again As.**
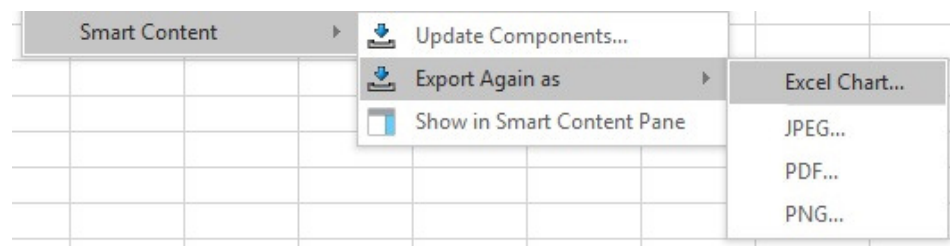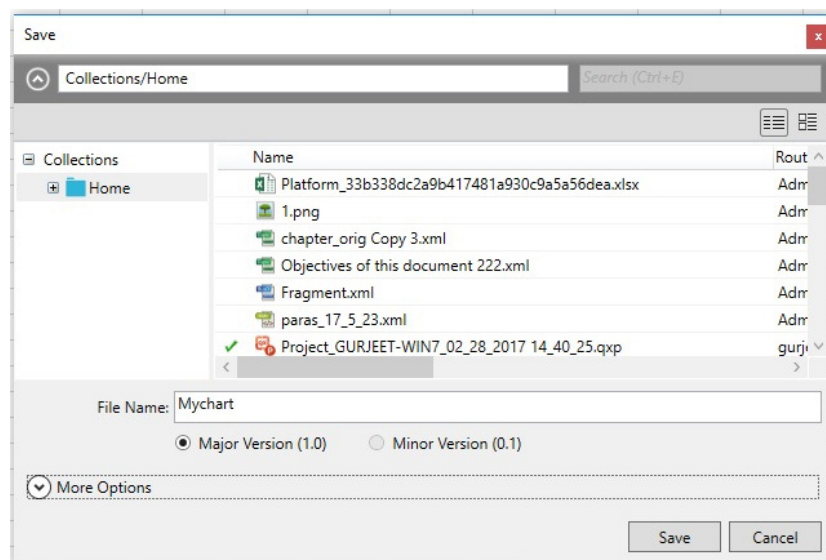

3. Enter a name for the chart or use the suggested name.

If a chart with the same name exists in the Excel document, an alert with an option to change the name of the chart displays.
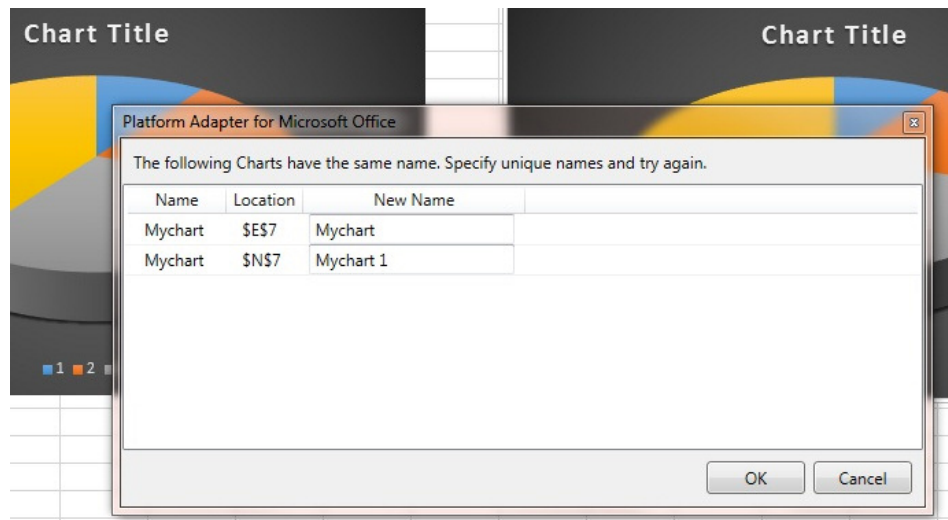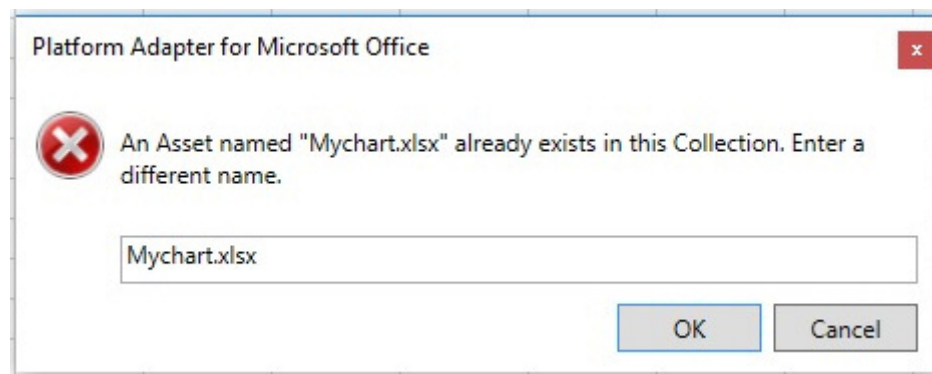
The save process needs to be re-initiated once the name of the chart is changed. The **Save** dialog displays.

4. Navigate to the required repository folder and click **Save**.

➡ If a component with the same name exists in the server, an alert with an option to change the name of the component displays.


The component is saved to the server with the specified name.

Copy to Server Clipboard

Tables and charts can be copied to the server clipboard from Microsoft Excel using the **Excel Adapter for Quark Publishing Platform**. To copy an item from Excel, select the desired chart or cells, and choose **Copy to Server Clipboard** from the context menu.

➡ Charts can also be copied to the server clipboard using the **CTRL+SHIFT+C** key combination.
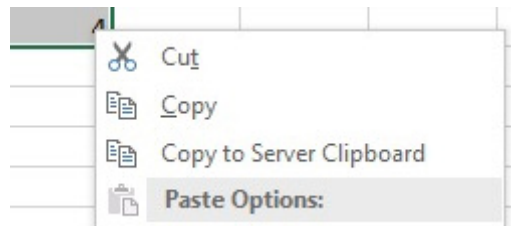

The selected item is copied to the server clipboard and is available for pasting using the **Paste from Server** option available in all instances of **Microsoft PowerPoint**, **Quark Author** and **Quark XML Author for Microsoft Word** that are currently connected to the server with the same credentials.

➡ No link to the server is maintained with tables pasted from the server clipboard.

➡ Clipboard links are maintained in the Excel document for charts copied to the server clipboard. These are converted to asset links once clipboard data is saved to the server in Quark Author.

Push Updates

The **Push Updates** button in the ribbon updates changes made to all linked components exported from Microsoft Excel to the Quark Publishing Platform server. These updates occur silently. No input is required from the user after clicking the **Push Updates** button.
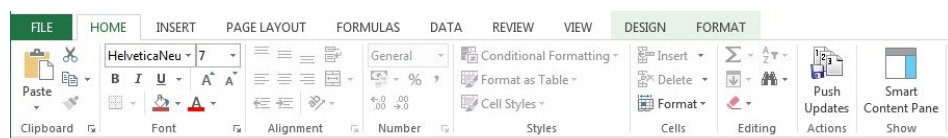
Once the update process is complete, the **Smart Content pane** is automatically refreshed and displays the updated versions of the components.

The Smart Content Pane in Microsoft Excel

The Smart Content Pane is available for all supported Microsoft Office applications, however, the contextual menu options offered by the Smart Content Pane may differ across these applications. The Smart Content pane in Microsoft Excel lists the components that have been exported from the currently open document. To show/hide the Smart Content pane, click the **Smart Content Pane** button in the **Home** ribbon.
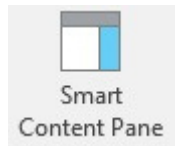
The following operations can be performed on the components listed in the Smart Content Pane:

- **Go To:** Selects the exported range on the worksheet.

- **Update Component:** Saves a revision of the component to the Platform server that includes any changes made to the component.

- **Edit Component:** Opens the selected component for editing in Microsoft Excel. The component will be updated once checked in to the server.

➡ This option is only available for Microsoft Excel components.

- **Break Component Link:** Breaks the link between the exported component and the document the range was exported from.

- **Link Component to Selected Range:** Choosing this option displays a dialog.
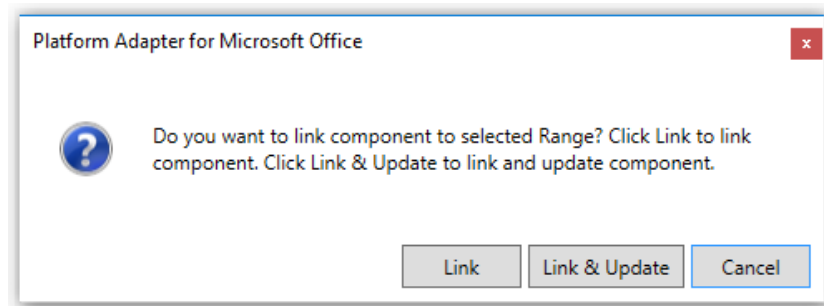
Choosing **Link** from the dialog links the exported component to currently selected range other than the originally exported range. If no name has been specified for the range, a name must be set for the new range. The components of the range need to be updated by invoking the contextual menu from the worksheet or from the Smart Content pane. Selecting **Link & Update** links the exported component to the currently selected range and updates the selected component in one step.

- **View Revisions:** Displays a list of revisions a component has undergone.

- **Where Used:** Displays a list of documents where this component has been referred.

- **Properties:** Displays the attributes of the components from the server.

- **Preview:** Displays a preview of the selected component. Multiple preview channels can be configured.

The PowerPoint Adapter for Quark Publishing Platform

The PowerPoint Adapter for Quark Publishing Platform allows users to manage, reuse and create new presentations using slides, Excel tables, Excel charts, audio,

video and images available on the server and check in and check out files from the Platform repository. Users can easily update slide decks and reference components as needed, all while maintaining familiar PowerPoint features for editing and design.

Supported File Types

The PowerPoint Adapter for Quark Publishing Platform currently supports the following formats:

- .pptx (PowerPoint Presentations)

- .potx (PowerPoint Templates)

- .pptm (Macro enabled PowerPoint Presentations)

- .potm (Macro enabled PowerPoint Templates)

Slides from checked-in documents will be available for referencing in Microsoft PowerPoint, Quark XML Author or Quark Author.

PowerPoint Slide assembly

PowerPoint users can easily assemble slides by reusing slides or complete PowerPoint decks from the Server. Users can also easily update slide decks and reference components as needed from the Quark Publishing Platform Server, all while maintaining familiar PowerPoint features for editing and design.
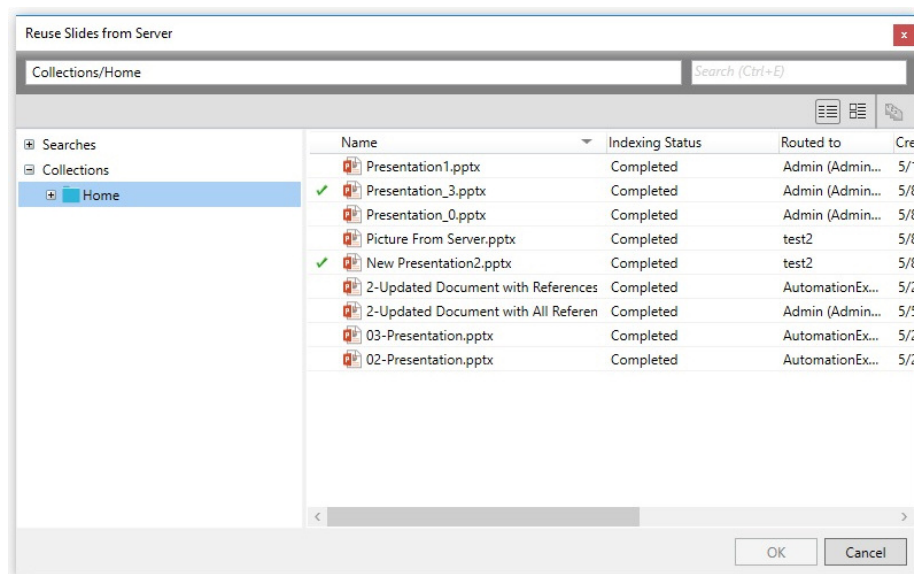
Inserting slides

Slides checked in to the Quark Publishing Platform Server can be inserted into a PowerPoint presentation. To insert slides from the Platform server:

1 Choose **Reuse Slides from Server** from the Platform ribbon or from the contextual menu. The **Reuse Slides from Server** dialog displays.
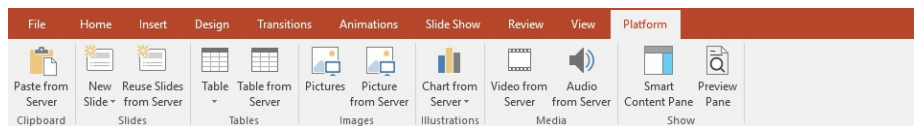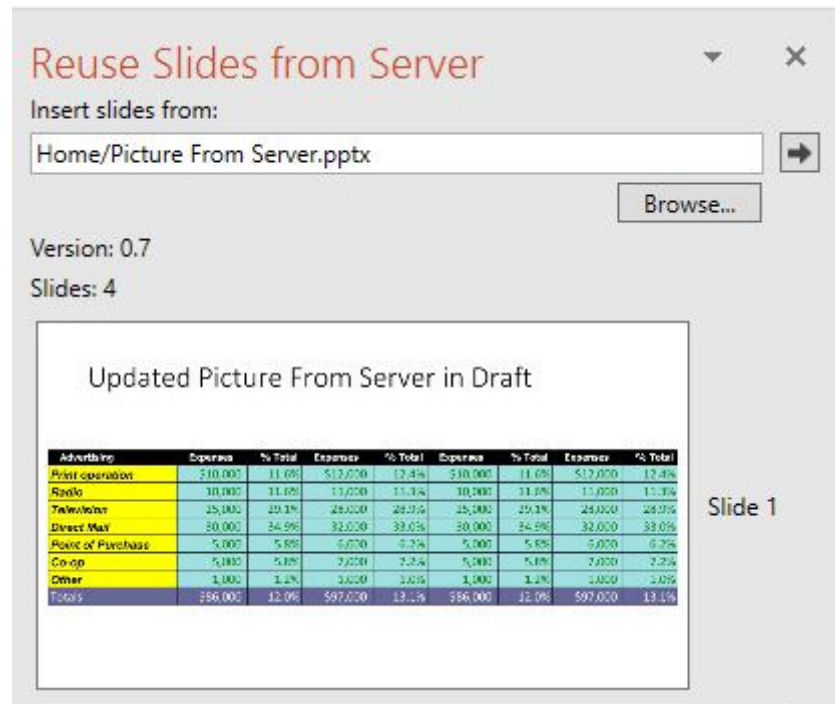

2 Browse to the required slide and click **OK**.

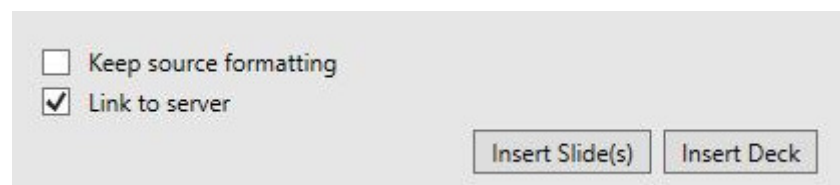➡ Previous versions of the selected asset can also be chosen using the View Revisions

[icon] button.

The path to slide is updated in **Insert slides from** and the available slides are populated in the **Reuse Slides from Server** pane.

3 Select the slides that you wish to insert and choose **Insert Slide(s)**. Choose **Insert Deck** to insert the entire slide deck.

➡ The **File Save** dialog displays if the PowerPoint presentation has not been saved. Click **Save** to save the file to your computer.

➡ If the **Keep source formatting** checkbox is deselected, the existing formatting of the slides will be overridden and the formatting of the current PowerPoint presentation will be applied to them.

➡ If the **Link to server** checkbox is deselected, this document cannot be updated to the latest version available on the server.

The slides are added to the PowerPoint document.

Component references

In addition to existing slides and PowerPoint decks, server components such as Excel tables, Excel charts, audio, video and images can also be easily added to slides.
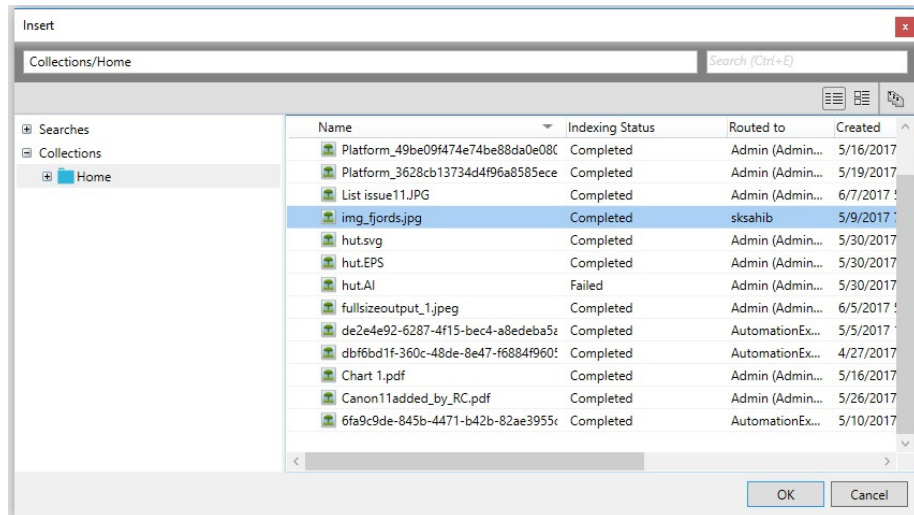
Picture from Server

Pictures checked into the platform server can easily be added to enrich PowerPoint slides. To insert a picture into a PowerPoint Slide:

1 Click the **Picture from Server** button in the **Platform** ribbon.
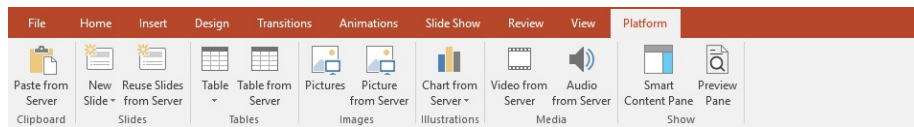
2 Browse to the desired picture in the **Insert** dialog.

➡ Previous versions of the selected asset can also be chosen using the View Revisions

 button.

3 Click **OK.**

➡ The inserted picture can be replaced with another picture from server by selecting **Change Picture** from the contextual menu.

The selected picture is inserted into the PowerPoint slide.

Table from Server

Microsoft Excel Tables that have been exported using the **Excel Adapter for Quark Publishing Platform** and Excel documents checked into the server can be inserted into slides using the **Table from Server** button in the **Platform** ribbon. To insert an Excel Table or Excel document:

1 Click the **Table from Server** button in the Platform ribbon.
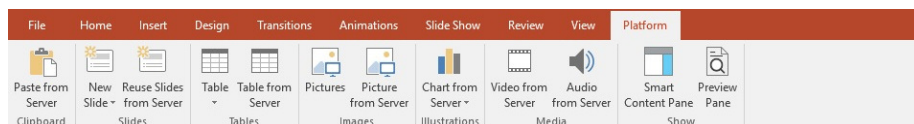
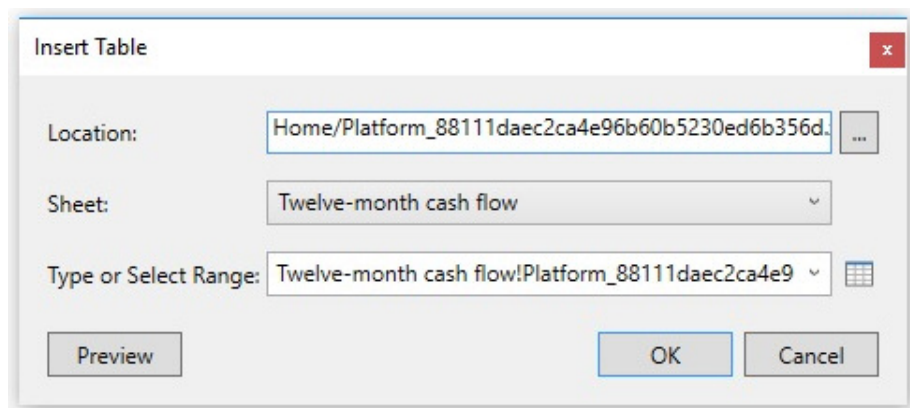2   Browse to the desired table or spreadsheet from the **Insert** dialog.
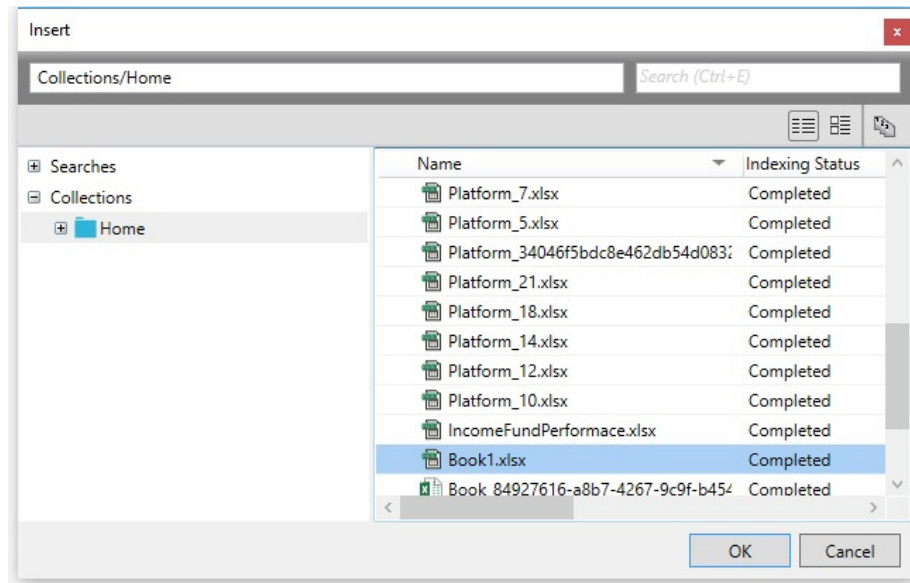
➡ Previous versions of the selected asset can also be chosen using the View Revisions

 button.

3   Click **OK**.

➡ If the selected document is a Microsoft Excel Table, the table will be inserted immediately.

➡ If the selected document is a Microsoft Excel document, the **Insert Table** dialog displays.

4   Browse to the desired table location, choose a sheet from the drop-down menu and select a range from the drop-down menu, or type in a custom range. Click the **Preview** button to see a preview of the selected table or range and click **OK** to insert the table.

➡ The inserted table can be replaced by another table from server by selecting **Change Link** from the contextual menu.

The selected table is inserted.

Chart from server

Microsoft Excel Charts can be added to slides as an editable object or as a shape. No content modification or range selection is possible when charts are added as a shape.

The following types of charts can be added to slides:

- **Microsoft Excel Chart as Shape** - The chart is added to the slide as a graphic. Content modification is not permitted.

- **Microsoft Excel Chart** - Content modification and range selection is permitted. Displayed data in these charts can be modified.
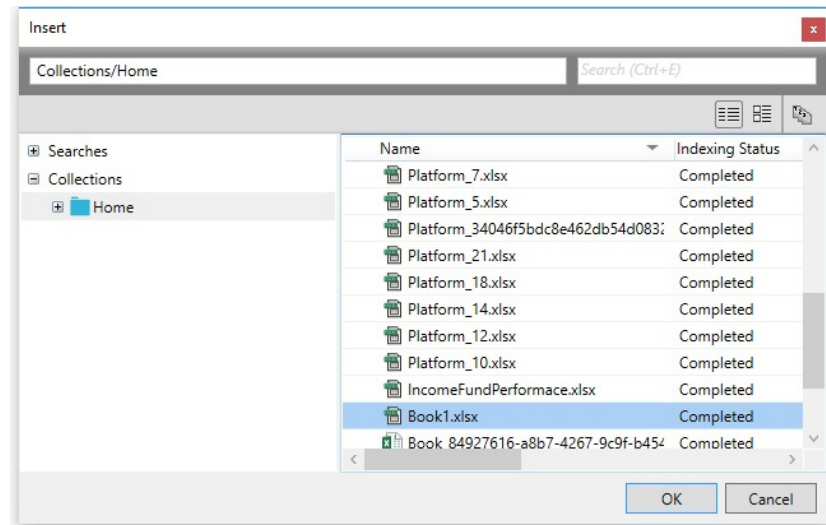
Inserting Microsoft Excel charts

Microsoft Excel Charts can be added to slides as editable objects. The design, formatting and data values of the chart can be edited within Microsoft PowerPoint.
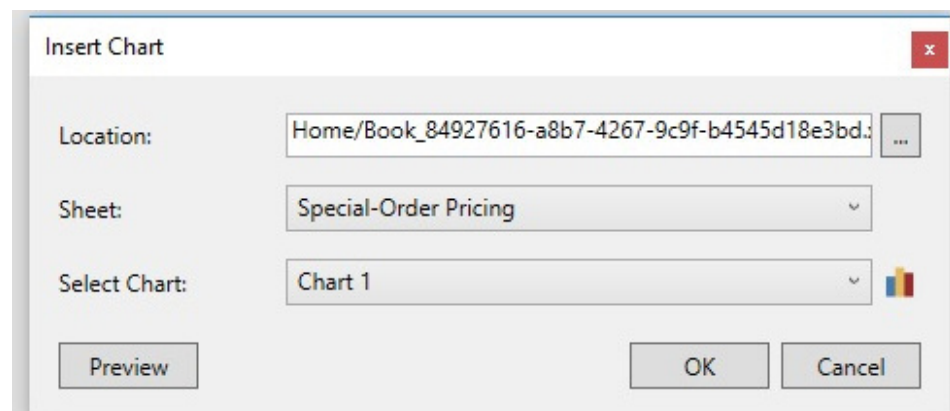
To insert a Microsoft Excel Chart:

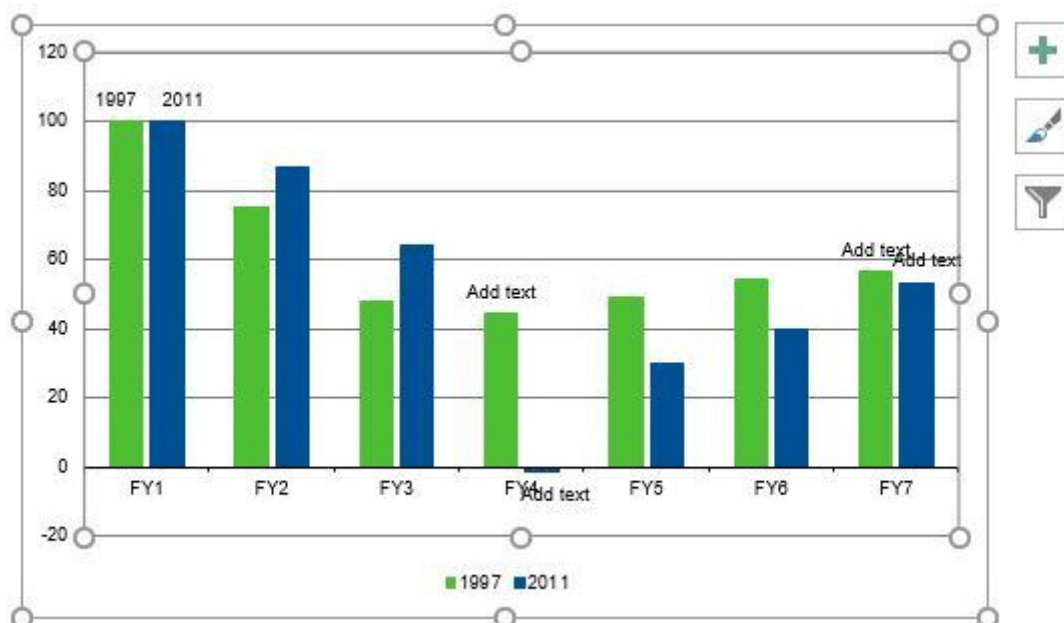1. Choose **Chart from Server > Microsoft Excel Chart** from the **Platform** ribbon.
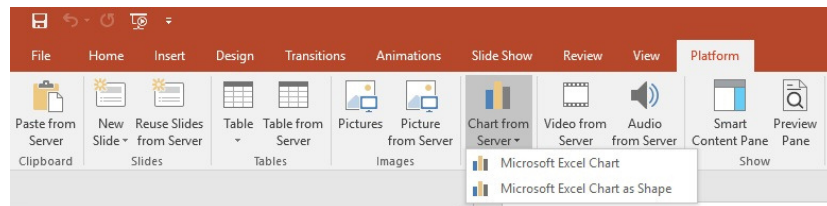
2. Browse to the desired Chart in the **Insert** dialog.

3. Click **OK**. If the selected Chart is a Microsoft Excel document, the **Insert Chart** dialog displays.

4. Choose the desired sheet and chart and click the **Preview** button to see a preview of the selected chart and click **OK** to insert the chart.
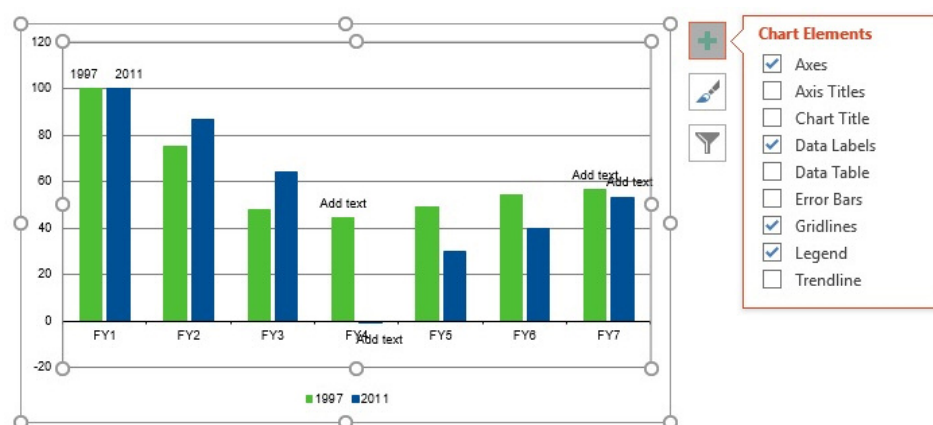

➡ The selected Chart is inserted. These charts can be edited akin to native PowerPoint Charts.

Customizing charts in a PowerPoint document
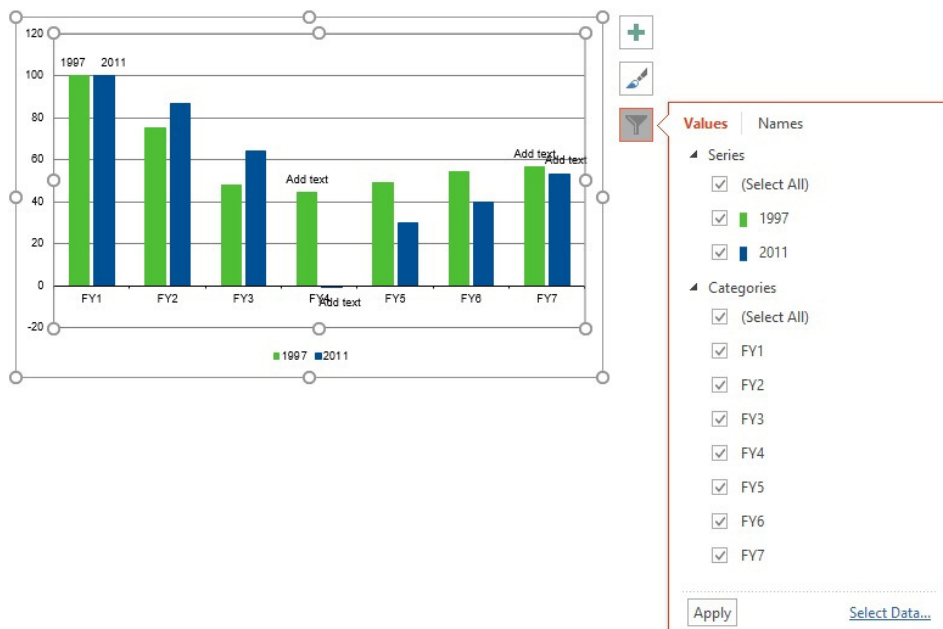
Clicking the [icon] icon opens the **Chart Elements** flyout menu. Items from the menu can be selected or deselected.

Clicking the [icon] icon opens the **Style** and **Color** flyout menu. The styling and color scheme of the chart can be altered from this menu.
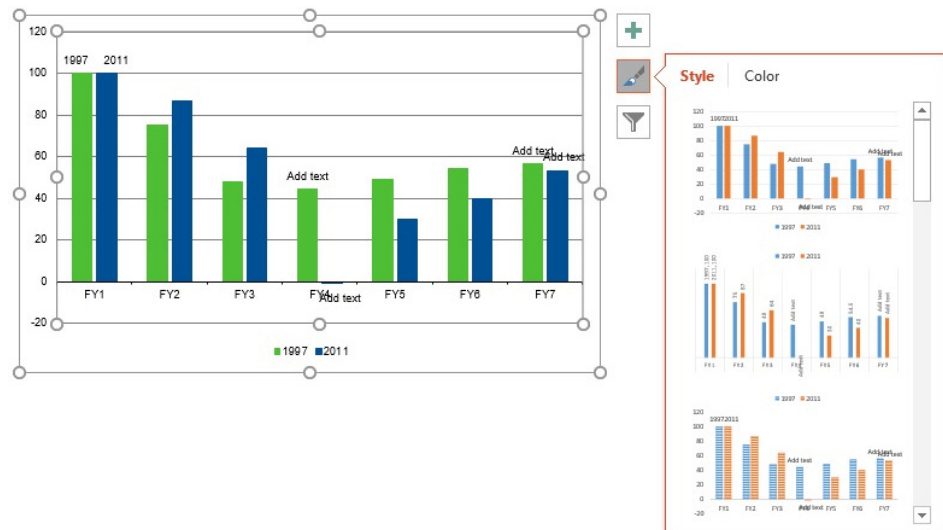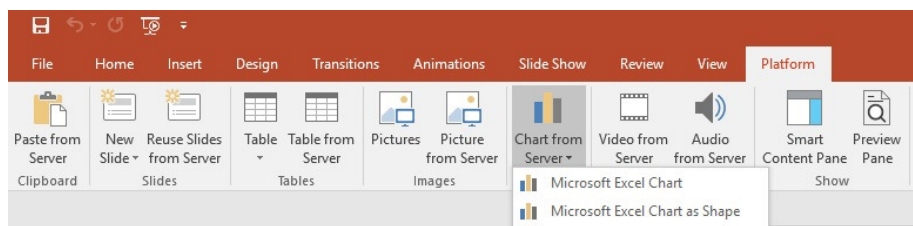
Clicking the [icon] icon opens the **Values** and **Names** flyout menu.
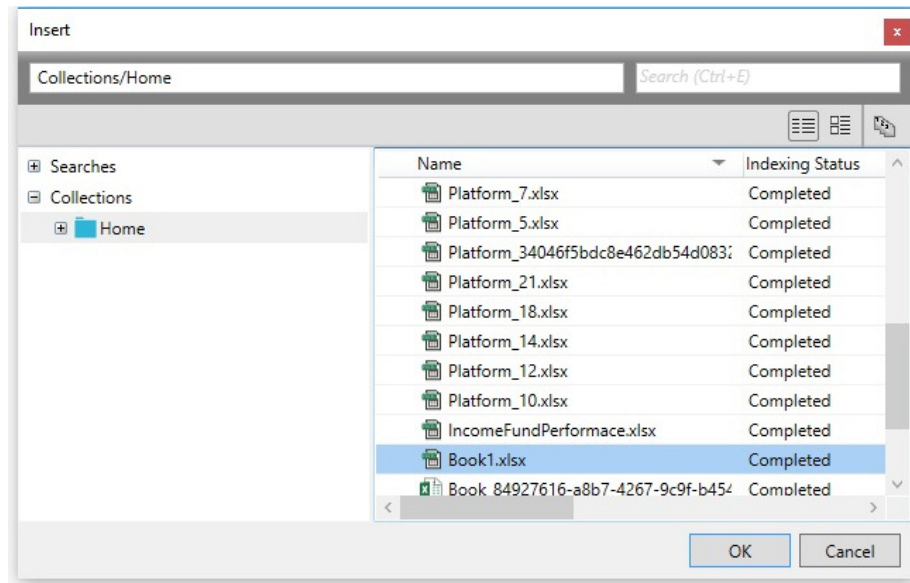

Inserting Microsoft Excel Chart as Shape

Charts checked in the Platform server can easily be added to PowerPoint slides as a shape. To add a Microsoft Excel Chart as a shape:

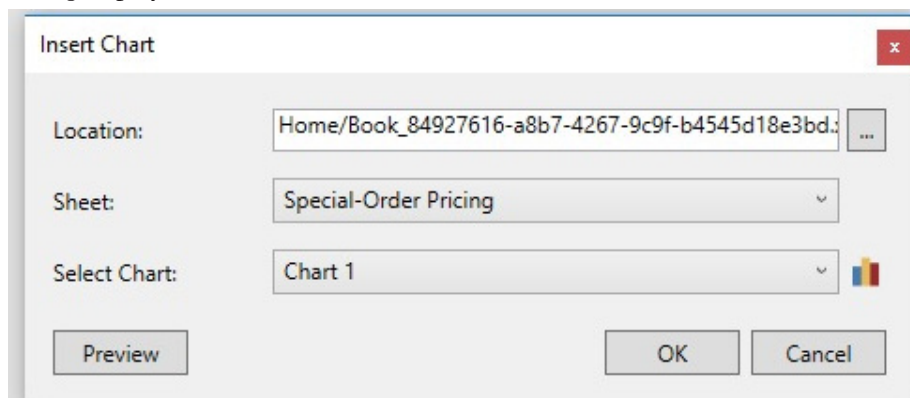1 Choose **Chart from Server > Microsoft Excel Chart as Shape** from the **Platform** ribbon.

2   Browse to the desired Chart in the **Insert** dialog.

➡ Previous versions of the selected asset can also be chosen using the View Revisions

 button.

3   Click **OK**. If the selected table is a Microsoft Excel document, the **Insert Chart** dialog displays.

4   Select the desired sheet and Chart and click the **Preview** button to see a preview of the selected chart. Click **OK** to insert the chart.

The selected Chart is inserted.

➡ Charts inserted as a shape cannot be edited.

➡ The inserted chart can be replaced by another chart from server by selecting **Change Link** from the contextual menu.

Paste from Server

Tables and charts can be copied from Microsoft Excel using the **Excel Adapter for Quark Publishing Platform**. The Quark Publishing Platform Server facilitates pasting the copied items in PowerPoint, Quark Author and Quark XML Author.
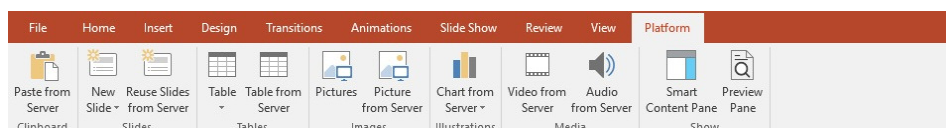
The copied items can be pasted using the **Paste from Server** button. Copied Excel tables will be pasted as native PowerPoint shapes and copied charts as native PowerPoint charts (as long as the logged on user is the same).

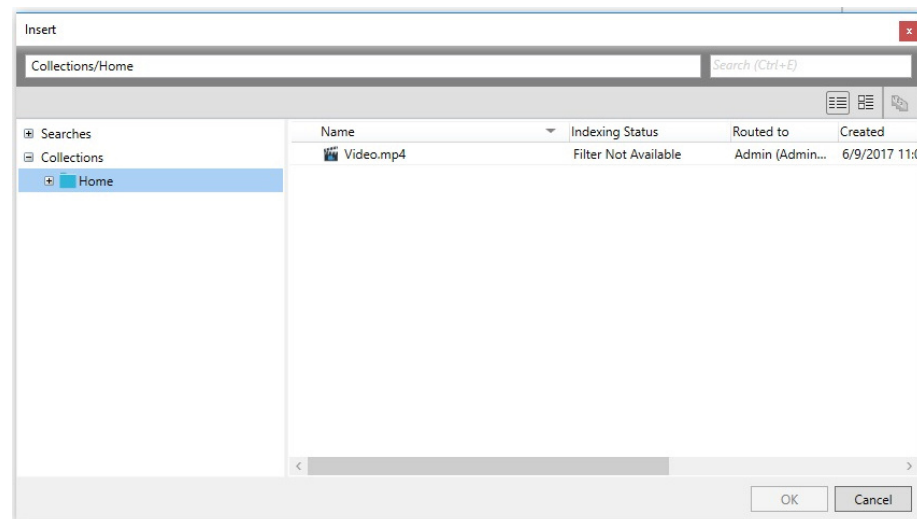➡ A link to the server is not maintained with components pasted from the server clipboard.

Video from Server

Video files checked into the platform server can easily be added to enrich PowerPoint slides. To insert a video into a PowerPoint Slide:

1 Click the **Video from Server** button in the **Platform** ribbon.
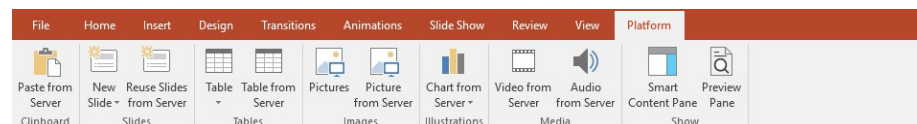
2 Browse to the desired video in the **Insert** dialog.

➡ Previous versions of the selected asset can also be chosen using the View Revisions

button.

3 Click **OK.** The selected video is inserted into the PowerPoint slide.

➡ Only server images can be used as poster images for Server videos.

➡ You can add a poster image for the inserted video clip. To insert a poster image, choose **Change Poster Image** from the contextual menu or click **Format > Poster Frame > Image from File**.

➡ The inserted video can be replaced with another video from server by selecting **Change Link** from the contextual menu.
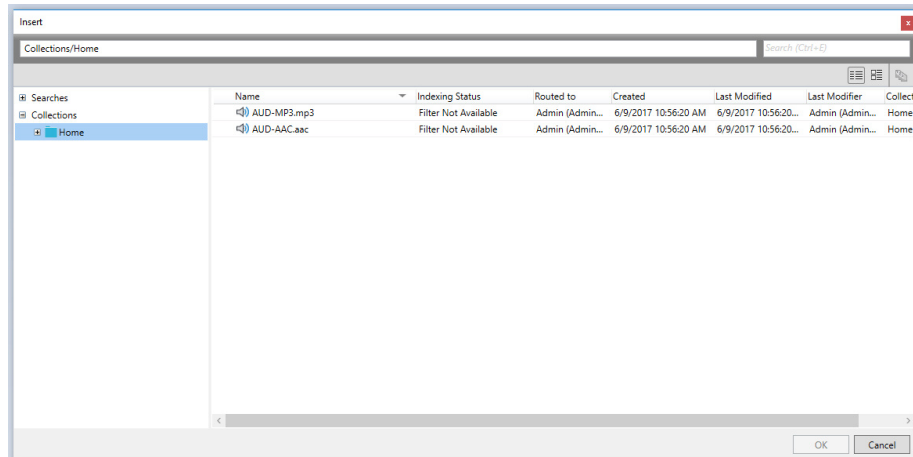
Audio from server

Audio files checked into the platform server can easily be added to enrich PowerPoint slides. To insert an audio clip:

1 Click the **Audio from server** button in the **Platform** ribbon.

2 Browse to the desired audio clip in the **Insert** dialog.

➡ Previous versions of the selected asset can also be chosen using the **View Revisions**

 button.

3 Click **OK.** The selected audio is inserted into the PowerPoint slide.

➡ You can add a cover image for the inserted audio clip. To insert a cover image, choose **Change Picture** from the contextual menu or select **Format >Change Picture**.

➡ Only server images can be used as cover images for server audio clips.

➡ The inserted audio clip can be replaced with another audio clip from server by selecting **Change Link** from the contextual menu.

The Smart Content Pane in Microsoft PowerPoint

The Smart Content pane is available in Microsoft Excel and PowerPoint, however, the contextual menu options offered by the Smart Content pane may differ across these applications.

In Microsoft PowerPoint, the Smart Content Pane lists the components referred from the Quark Publishing Platform server. To show/hide the Smart Content pane, click the **Smart Content Pane** button in the **Home** or the **Platform** ribbon.

Changes and updates to referred components are indicated with the ⟳ indicator in the Smart Content pane in Microsoft PowerPoint.

Updates to any referred components are also indicated in the Smart Content pane icon.

Invoking the contextual menu here provides the option to update the asset to the latest version available on the server. The metadata of the latest version will always be shown in the Smart Content Pane. If the inserted asset has been checked out from the server, the checked out icon will be displayed ✔ in the right hand corner. The Smart Content pane in Microsoft PowerPoint allows the following operations to be performed on the listed components via the contextual menu:

- **Go to:** Moves the focus to the selected reference on the canvas.

- **Update Link:** The element reference is refreshed. Local changes will be replaced with the latest content on the server.

- **Break Link:** The link to the server asset is removed. Any changes made to the asset on the server will not be reflected in the client.

- **Edit Original:** Opens the original Excel document from which the referred table, picture or chart has been exported for editing.

- **Edit Link:** The referred table, chart or PowerPoint slide is checked out to be edited.

- **Open Link:** Opens a read-only copy of the asset the element is referred from.

- **View Revisions:** Displays a list of revisions a component has undergone.

- **Where Used:** Displays a list of documents where this component has been referred.

- **Properties:** Displays the attributes of the components from the server.

- **Preview:** Displays a preview of the selected component. Multiple preview channels can be configured.

The Preview Pane

The Preview pane displays a preview of the current PowerPoint presentation. To show/hide the Preview pane, click **Preview Pane** in the **Home** ribbon.

Multiple preview channels can be configured in the Preview Pane. The currently supported channels are HTML5 and PDF.


Previews can be downloaded in the selected preview format by clicking the ⬇ button.

➡ The **Save** dialog displays if the PowerPoint presentation has not been saved. Choose **Save** to Save the file to your computer.

Multi-channel Publishing

The PowerPoint Adapter for Quark Publishing Platform Server facilitates the publishing of a PowerPoint slide deck to various formats.
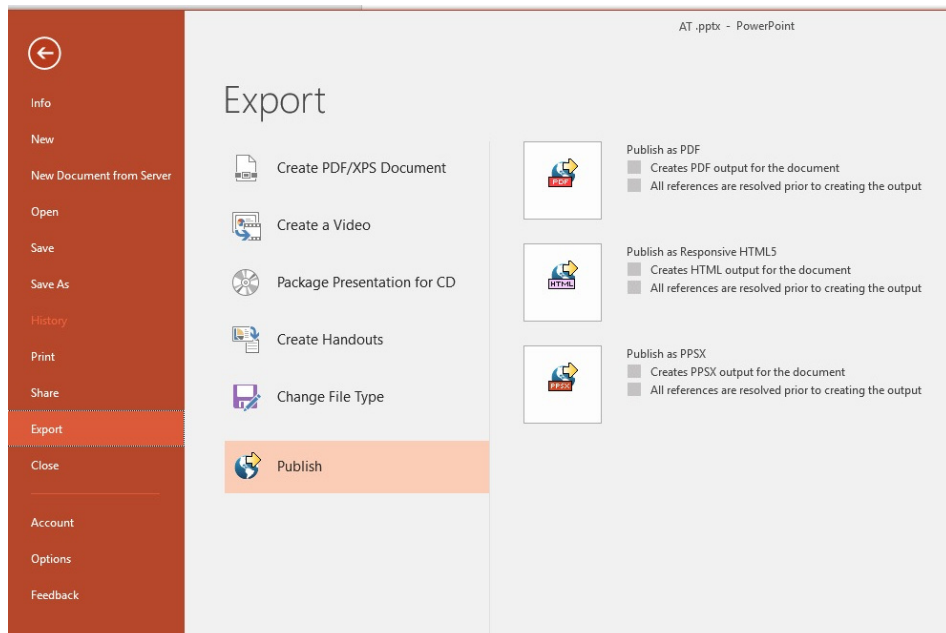
Slides can be published as PDF, Responsive HTML 5 or PPSX.

- **Publish as PDF**

Publishing slides as PDF creates a PDF of the entire slide deck. All server references are resolved prior to publishing the slides.

- **Publish as Responsive HTML5**

Publishing slides as Responsive HTML5 creates an HTML rendition of the entire slide deck. All server references are resolved prior to publishing the slides.

- **Publish as PPSX**

Publishing slides as PPSX creates a PowerPoint slideshow of the entire slide deck. All server references are resolved prior to publishing the slides.

To export a presentation in one of the available formats:

1. Click **File > Export > Publish.**

2. Choose the desired publishing format.

3. Select the output location from the **Publishing Settings** dialog and click OK to publish the slide deck.
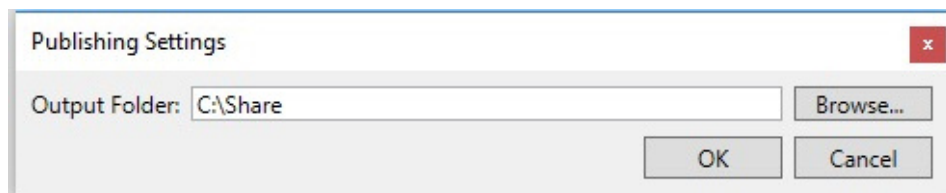
The slide deck is published to the desired format.

The Word Adapter for Quark Publishing Platform

The Word Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The Word Adapter for Quark Publishing Platform currently supports the following formats:

- .docx (Word Document)
- .dotx (Word Template)

➡ Component referencing is currently not supported for Microsoft Word documents.

The Visio Adapter for Quark Publishing Platform

The Visio Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The Visio Adapter for Quark Publishing Platform currently supports the following formats:

- .vsdx (Visio Drawing)

- .vstx (Visio Template)

- .vsdm (Visio Macro-Enabled Drawing)

- .vstm (Visio Macro-Enabled Template)

Checked-in Visio drawings from these documents will be available for referencing in Quark XML Author or Quark Author.

Contacting Quark

The support portal allows you to log support tickets, track tickets, receive status notifications, chat with a technical support representative, search the Knowledge Base, and access product documentation.

With direct access to documentation across all Quark software - from QuarkXPress and App Studio to Quark Enterprise Solutions - you can find answers to your questions at your convenience. Our support team is also available to help, either through our support portal, or via phone for our maintenance contract customers.

If you are a Quark customer and have a current maintenance or support contract your account has already been created for you using your registered email address. If you do not have a support contract you can purchase a single support incident to get your problem resolved. If you have purchased or registered a supported product, you are eligible for free support for the first 90 days.

In the Americas

For more details, please check out our support website

Outside the Americas

For countries outside the Americas, please visit the following sites to access your support account:

Support Website

- France - *www.quark.com/fr/support*

- Germany - *www.quark.com/de/support*

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