

2015

**PUBLISHING  
PLATFORM**



# A Guide to Quark Publishing Platform Adapter for InDesign and InCopy 12.0

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# Introduction

This supplement to *A Guide to Quark Publishing Platform* describes the functionality that Quark Publishing Platform® Adapter for InDesign® adds to Adobe® InDesign and Adobe InCopy®.

Using these plugins a designer can:

- Store all InDesign documents on Quark Publishing Platform using version control.
- Use a Quark Publishing Platform workflow to assign status and route InDesign documents, InCopy articles, images and digital assets.
- Reference InCopy articles, images and digital assets from Quark Publishing Platform in InDesign documents. These referenced documents are automatically fetched from Platform at the time of output including when exporting to App Studio.

# The Quark Publishing Platform User Interface (InDesign and InCopy)

Users can access their Quark Publishing Platform workflow through the Platform Client application, WebClient, and (using XTensions® software) QuarkCopyDesk®, QuarkXPress®, and (using Plugins software) Adobe InDesign, and Adobe InCopy®. This chapter provides details of the Quark Publishing Platform user interface present in InDesign and InCopy on Mac OS X®. For more information about the Quark Publishing Platform user interface, see *A Guide to Quark Publishing Platform*.

## Menus (Adobe InDesign)

See *Adobe® InDesign® User Guide* for a detailed explanation of Adobe InDesign menu commands. The information below applies specifically to InDesign in a Quark Publishing Platform environment.

### InDesign menu (Mac OS X only)

The **InDesign** menu is a part of InDesign for Mac OS X. This menu includes the following Quark Publishing Platform related commands:

- **Preferences:** Lets you specify default settings and customize the way Quark Publishing Platform related tasks are performed in InDesign. For more information, see "[Setting Quark Publishing Platform preferences: InDesign](#)."

### Platform Menu — InDesign

If you select a text frame that contains an InCopy article, the commands in this menu pertain to articles. Otherwise, they pertain to InDesign documents

This menu includes the following commands:

- **Check Out Document:** Lets you search for and check out an InDesign document or template.
- **Check Out Article:** Lets you check out the InCopy article in the selected text frame for editing.

- **Check In Document:** Lets you check in the active InDesign document. You can check in a InDesign template by choosing InDesign Template from the Content Type drop-down menu in the Check In dialog box.
- **Check In Document With References:** Lets you check in the active InDesign document and all unattached and unassigned references (pictures, video and audio files) used in the document.
- **Check In Article:** Lets you check in the InCopy article in the active text frame.
- **Cancel Document Checkout:** Closes the active document and makes it available for others to check out. Changes made since checkout are discarded.
- **Cancel Article Check Out:** Closes the InCopy article in the active text frame and makes it available for others to check out. Changes made since checkout are discarded.
- **Save Document Revision:** Updates Quark Publishing Platform Server with changes to the active InDesign document and leaves the document checked out for further editing.
- **Save Article Revision:** Updates Quark Publishing Platform Server with changes to the InCopy article in the active text frame and leaves the article checked out for further editing.
- **Assign as Article:** Assigns the selected text frame as an article.
- **Assign as Picture:** Assigns the picture in the selected box as a direct attachment.
- **Place Picture:** Displays the **Asset Picker** dialog box to choose a picture (or pictures) to place in the Document. To place a 360 image or a slideshow, you can choose multiple pictures from the **Asset Picker** dialog.
- **Place Audio:** Displays the **Asset Picker** dialog box to choose an audio file to place in the Document.
- **Place Video:** Displays the **Asset Picker** dialog box to choose a video file to place in the Document.
- **Detach:** Detaches any InCopy articles or pictures assigned to the selected boxes.
- **Add Component:** To add a new component to an InCopy article in the active document, select one or more boxes and choose this option. If the document contains more than one InCopy article, the **Select Article** dialog box lets you choose which InCopy article you want to add.
- **Edit Attributes > Document:** Lets you view and change attribute information for the active InDesign document.
- **Edit Attributes > Article:** Lets you view and change attribute information for the InCopy article in the active text frame.
- **Edit Attributes > Picture:** Lets you view and change attribute information for the selected picture in the active InDesign document.
- **View Revisions > Document:** Lets you display read-only copies of revisions of the active document and revert the document to an earlier revision.
- **View Revisions > Article:** Lets you display read-only copies of revisions of the InCopy article in the active text frame and revert the article to an earlier revision.

- **View Revisions > Picture:** Lets you display the **Revisions** dialog box for the picture attached to the active picture box.
- **View Revisions > For All Documents:** Lets you display read-only copies of revisions of documents and revert documents to an earlier revision.
- **Update > Update All:** Updates all content and geometry in the active InDesign document.
- **Update > Content:** Updates all the content in the active frame or frames to include the current content of attached InCopy articles and graphic assets stored on Quark Publishing Platform Server.
- **Update > All Content:** Updates all the content in the active InDesign document to include the current content of all attached assets to match the versions stored in Quark Publishing Platform Server. This command can update both InCopy articles and graphic assets.
- **Update > Geometry:** Updates Quark Publishing Platform Server to include the current page geometry of the active text frame or frames. This enables a InCopy user who is working on an InCopy article attached to the active text frame or frames to have exact copyfit information for the assignment.
- **Update > All Geometry:** Updates Quark Publishing Platform Server with the current page geometry of the active InDesign document. This enables an InCopy user who is working on an InCopy article that is attached to the active InDesign document to have exact copyfit information.
- **Workspace Browser:** Shows and hides the **Workspace Browser** palette.
- **Help:** Displays Quark Publishing Platform Help.
- **Log On/Log Off:** Logs the user on to or off of Quark Publishing Platform.

### Menus (Adobe InCopy)

See *Adobe® InCopy® User Guide* for a detailed explanation of Adobe InCopy menu commands. The information below applies specifically to InCopy in a Quark Publishing Platform environment.

#### InCopy menu (Mac OS X only)

The **Platform** menu is a part of InCopy for Mac OS X. This menu includes the following Quark Publishing Platform related commands:

- **Preferences:** Lets you specify default settings and customize the way Quark Publishing Platform related tasks are performed in InCopy. For more information, see "[Setting Quark Publishing Platform preferences: InCopy.](#)"

#### Platform Menu — InCopy

This menu includes the following commands:

- **Check Out Article:** Lets you search for and check out an InCopy article.
- **Check In Article:** Lets you check in the active InCopy article.

## THE QUARK PUBLISHING PLATFORM USER INTERFACE (INDESIGN AND INCOPY)

- **Cancel Article Check Out:** Closes the active article and makes it available for others to check out. Changes made since checkout are discarded.
- **Save Article Revision:** Updates Quark Publishing Platform Server with changes to the active InCopy article and leaves the article checked out for further editing.
- **Edit Article Attributes:** Displays the **Edit Attributes** dialog box. This dialog box lets you view and change attribute information for the active InCopy article.
- **View Article Revisions:** Lets you display read-only copies of revisions of the active InCopy article and revert the article to an earlier revision.
- **View Revisions for All Articles:** Lets you display read-only copies of revisions of InCopy articles and revert articles to an earlier revision.
- **Workspace Browser:** Shows and hides the **Workspace Browser** palette.
- **Help:** Displays Quark Publishing Platform Help.
- **Log On/Log Off:** Logs you on to or off of Quark Publishing Platform

# Quark Publishing Platform Preferences

For an overview of Quark Publishing Platform workflow concepts, see chapter 3 of *A Guide to Quark Publishing Platform*. This chapter explains how to set Quark Publishing Platform workflow preferences in Adobe InDesign and Adobe InCopy.

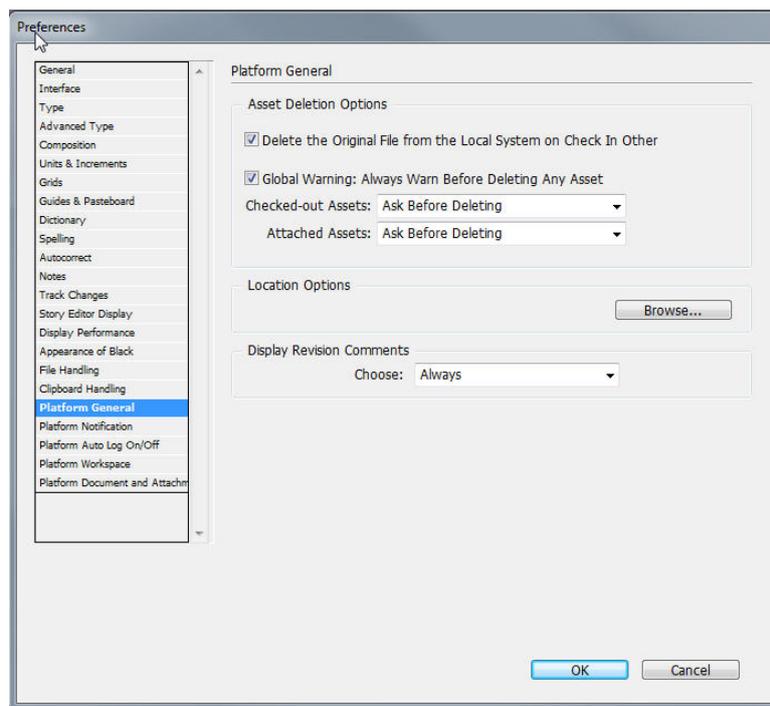
## Setting Quark Publishing Platform preferences: InDesign

The Platform panes in the **Preferences** dialog box (**InDesign > Preferences**) let you specify default Quark Publishing Platform behaviors for InDesign. Preference settings apply to the user name you enter when you log on, regardless of the workstation settings.

- ➔ Except for the **Location Options**, **Do not Display Log On Dialog Box**, and **Don't Create Previews and Thumbnails Locally** preferences, all Quark Publishing Platform preferences are stored in Quark Publishing Platform Server. Therefore, only these three preferences are editable when you are not logged in to the server.

### InDesign Preferences: Platform General

The **Platform General** pane of the **Preferences** dialog box lets you set general preferences for Quark Publishing Platform in InDesign.



The **Platform General** pane of the **Preferences** dialog box

To always retain original files when you use the **Check In Other** command, uncheck **Delete the Original File from Local System on Check In Other**. If you check this option, a warning message displays every time you use the **Check In Other** command, enabling you to retain or delete the selected file.

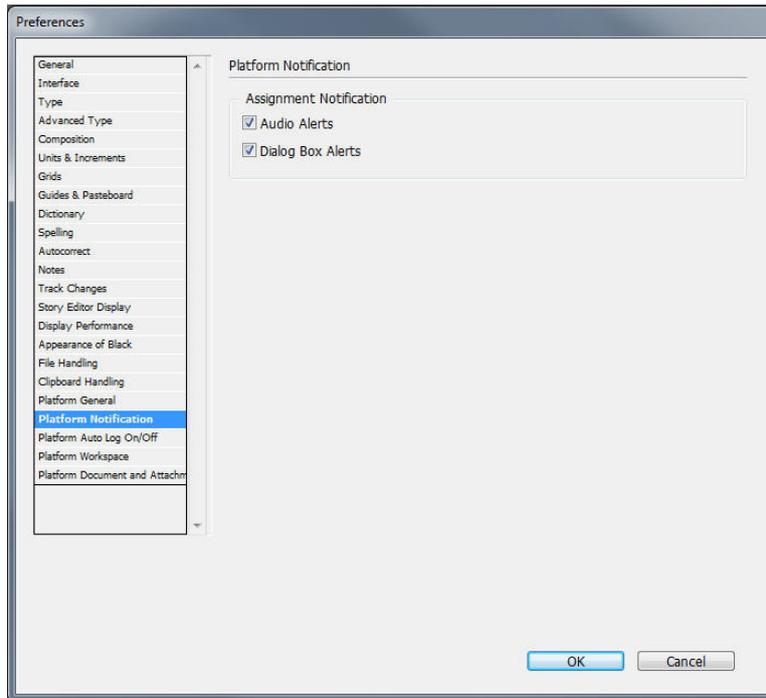
To specify how Adobe InDesign responds when you attempt to delete checked-out assets and assets attached to Adobe InDesign documents, use the controls in the **Asset Deletion Options** area.

The **Location Options** area lets you specify where you store checked-out assets while you work on them.

To control when revision comments display, choose an option from the **Choose** drop-down menu in the **Display Revision Comments** area.

### **InDesign Preferences: Platform Notification**

The **Platform Notification** pane lets you determine how you want to be notified when articles and assets are routed to you while you are logged on.



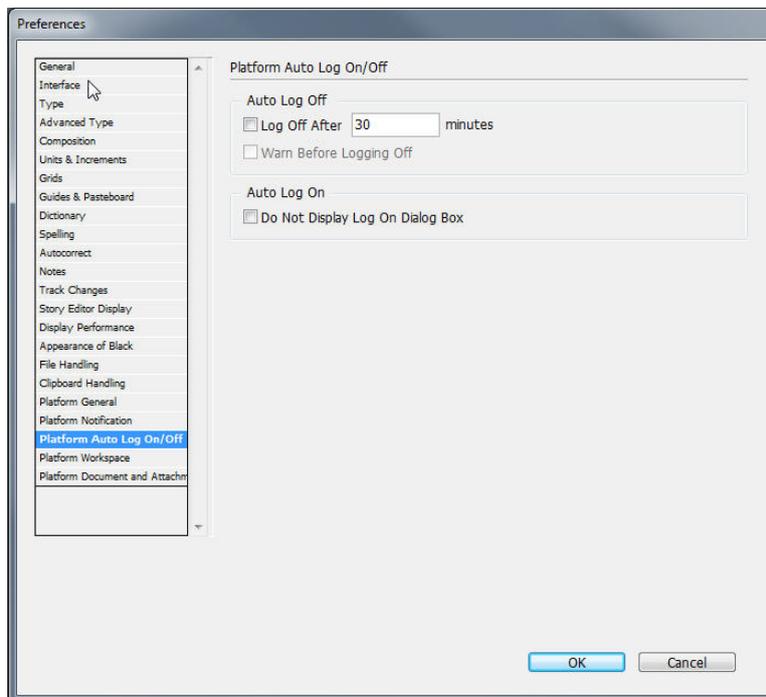
The **Platform Notification** pane of the **Preferences** dialog box

To play a sound when an asset is routed to you, check **Audio Alerts**.

To display a dialog box that indicates the names of an asset when that asset is routed to you, check **Dialog Box Alerts**.

### InDesign Preferences: Platform Auto Log On/Off

The **Platform Auto Log On/Off** pane lets you control automatic log off and log on.



The **Platform Auto Log Off** pane of the **Preferences** dialog box

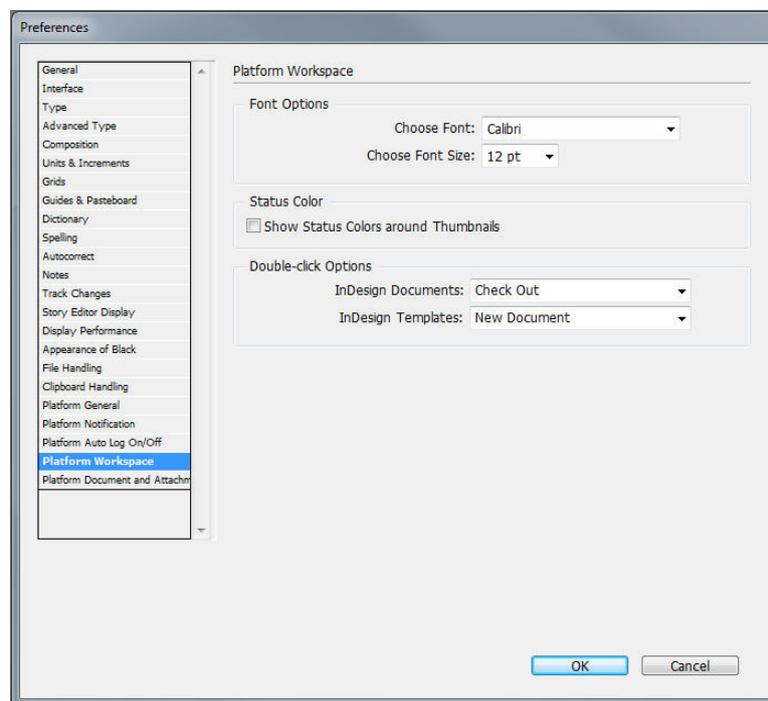
## QUARK PUBLISHING PLATFORM PREFERENCES

To turn on automatic log off, check **Log Off After**. To specify the interval of inactivity that must pass before you are automatically logged off, enter a value in the **minutes** field. To display a warning message before you are automatically logged off, check **Warn Before Logging Off**.

To bypass the **Log On** dialog box the next time you log on to a Quark Publishing Platform Server, check **Do Not Show This Dialog Box Again** and **Remember Me** in the **Log On** dialog box. If you want the **Log On** dialog box to display again the next time you log on, uncheck **Do Not Display Log On Dialog Box**.

### InDesign Preferences: Platform Workspace

The **Platform Workspace** pane lets you control the font and size used for search results in the **Workspace Browser** and specify whether to show status colors around thumbnails.



The **Platform Workspace** pane of the **Preferences** dialog box

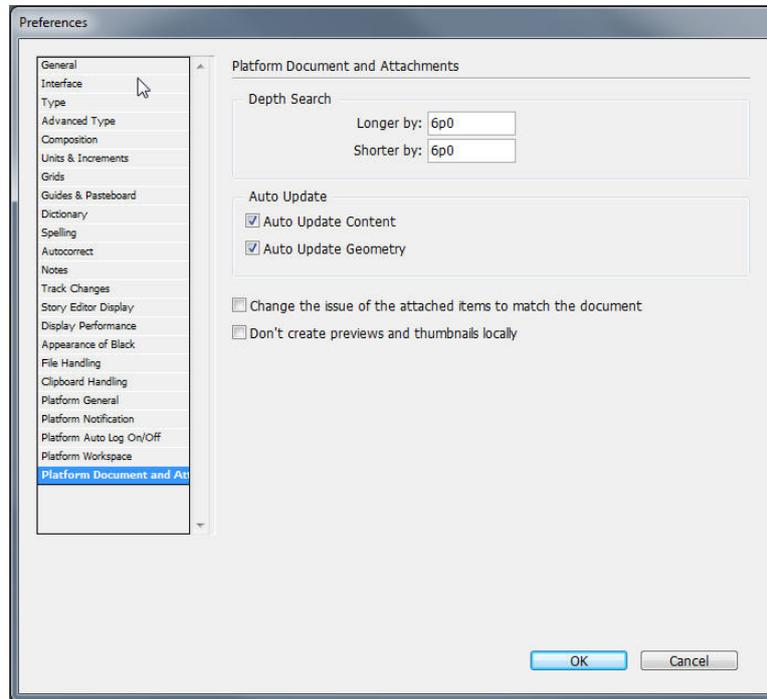
To control the font and size used in the **Workspace Browser** palette, use the controls in the **Font Options** area.

To indicate asset status with color outlines, check **Show Status Colors around Thumbnails**.

To specify what happens when you double-click an InDesign document or template in the **Workspace Browser** palette, use the controls in the **Double-click Options** area. The default Double-click option for InDesign Templates is **New Document**. If the user double clicks on an InDesign Template in the Workspace Browser, a new document will be created

## InDesign Preferences: Platform Document and Attachments

The **Platform Document and Attachments** pane lets you control depth settings and article status notifications.



The **Platform Document and Attachments** pane of the **Preferences** dialog box

The **Depth Search** area applies to the Fit to Text-Box Depth feature in InDesign. When you select a text box or chain and choose **Quark Publishing Platform > Saved Searches > Fit to Text-Box Depth**, Quark Publishing Platform displays articles that are longer than the text box by up to the amount in the **Longer By** field and articles that are shorter than the text box by the up to the amount in the **Shorter By** field. For example, if the text box is six inches long and both of these values are set to one inch, articles with lengths between five and seven inches display.

To control if article content and geometry are automatically updated at check-in and check-out, choose the options in the **Auto Update** area.

To automatically synchronize Issue attributes for documents and asset attachments, check **Change the issue of the attached items to match the document**. When this option is checked, if you change the **Issue** attribute for an InDesign document, the **Issue** attribute for all assets attached to the InDesign document will update automatically to match.

By default, when you check in an InDesign document or an InCopy article, Quark Publishing Platform PlugIns software creates and checks in a thumbnail and preview for that file. To prevent this, check **Don't create previews and thumbnails locally**.

## Setting Quark Publishing Platform preferences: InCopy

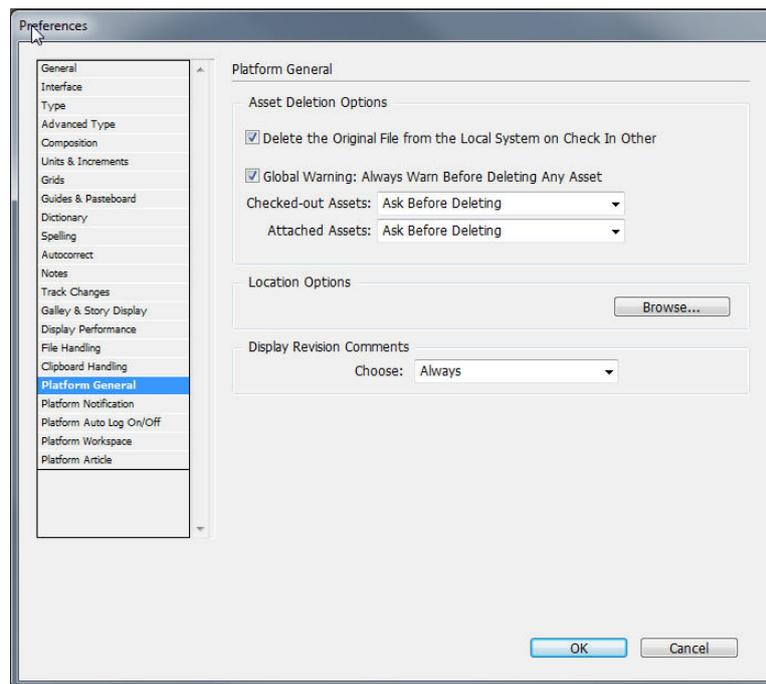
The Platform panes in the **Preferences** dialog box (**InCopy > Preferences**) let you specify default Quark Publishing Platform behaviors for InCopy. Preference settings

apply to the user name you enter when you log on, regardless of the workstation settings.

- ➔ Except for the **Location Options**, **Do not Display Log On Dialog Box**, and **Don't Create Previews and Thumbnails Locally** preferences, all Quark Publishing Platform preferences are stored in Quark Publishing Platform Server. Therefore, only these three preferences are editable when you are not logged in to the server.

### InCopy Preferences: Platform General

The **Platform General** pane of the **Preferences** dialog box lets you set general preferences for Quark Publishing Platform.



The **Platform General** pane of the **Preferences** dialog box

To always retain original files when you use the **Check In Other** command, uncheck **Delete the Original File from Local System on Check In Other**. If you check this option, a warning message displays every time you use the **Check In Other** command, enabling you to retain or delete the selected file.

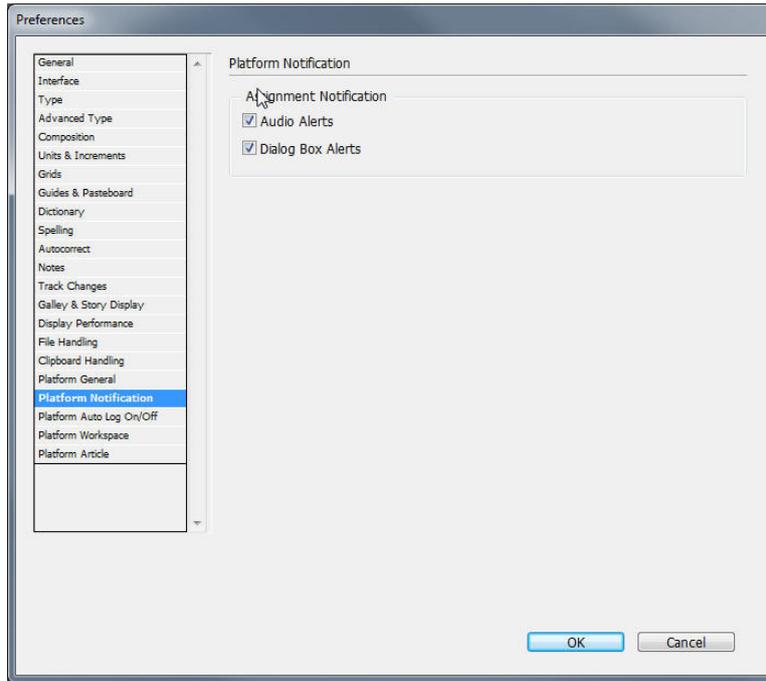
To specify how Adobe InCopy responds when you attempt to delete checked-out assets and assets attached to Adobe InDesign documents, use the controls in the **Asset Deletion Options** area.

The **Location Options** area lets you specify where you store checked-out assets while you work on them.

To control when revision comments display, choose an option from the **Choose** drop-down menu in the **Display Revision Comments** area.

### InCopy Preferences: Platform Notification

The **Platform Notification** pane lets you determine how you want to be notified when assets are routed to you while you are logged on.



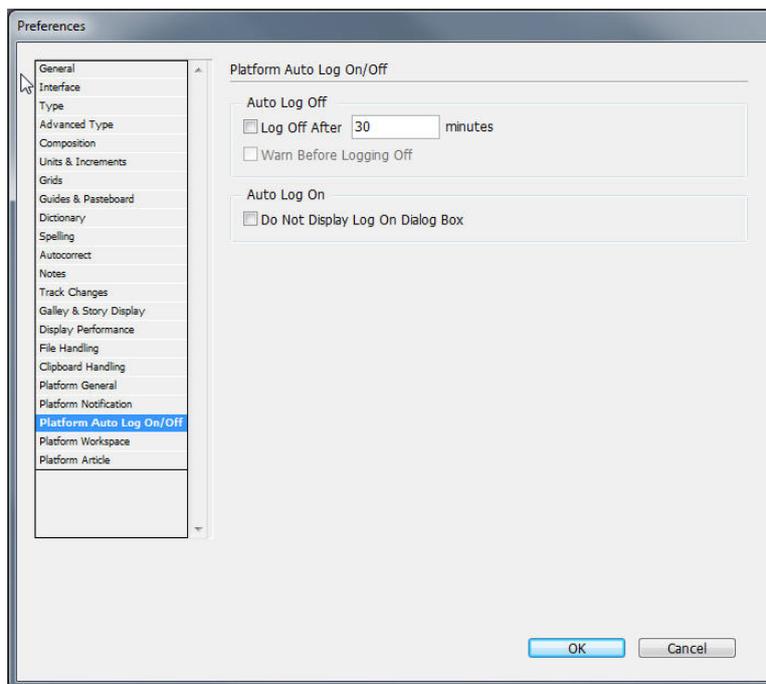
The **Platform Notification** pane of the **Preferences** dialog box

To play a sound when an asset is routed to you, check **Audio Alerts**.

To display a dialog box that indicates the names of an asset when that asset is routed to you, check **Dialog Box Alerts**.

### InCopy Preferences: Platform Auto Log On/Off

The **Platform Auto Log On/Off** pane lets you control automatic log off and log on.



The **Platform Auto Log Off** pane of the **Preferences** dialog box

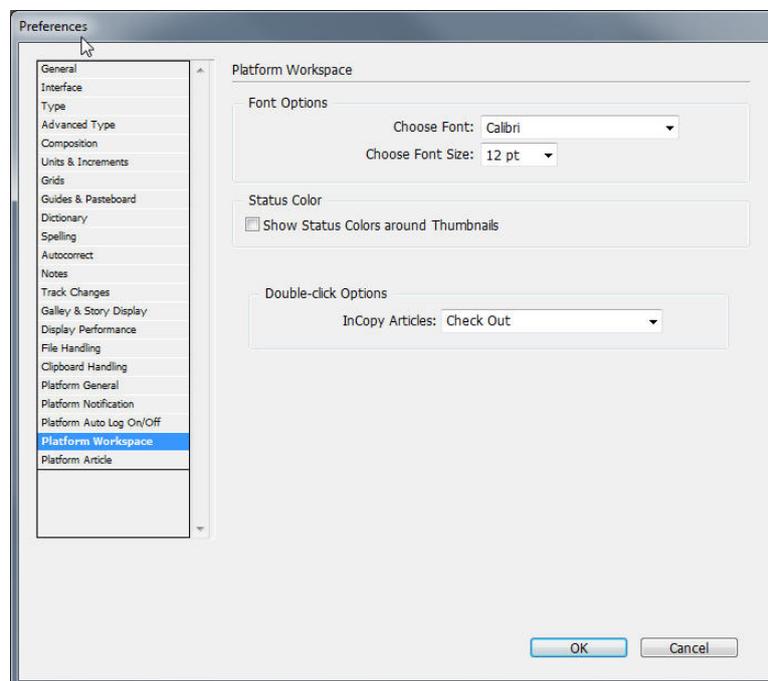
## QUARK PUBLISHING PLATFORM PREFERENCES

To turn on automatic log off, check **Log Off After**. To specify the interval of inactivity that must pass before you are automatically logged off, enter a value in the **minutes** field. To display a warning message before you are automatically logged off, check **Warn Before Logging Off**.

To bypass the **Log On** dialog box the next time you log on to a QPP Server, check **Do Not Show This Dialog Box Again** and **Remember Me** in the **Log On** dialog box. If you want the **Log On** dialog box to display again the next time you log on, uncheck **Do Not Display Log On Dialog Box**.

### InCopy Preferences: Platform Workspace

The **Platform Workspace** pane lets you control the font and size used for search results in the **Workspace Browser** and specify whether to show status colors around thumbnails.



The **Platform Search Palette Settings** pane of the **Preferences** dialog box

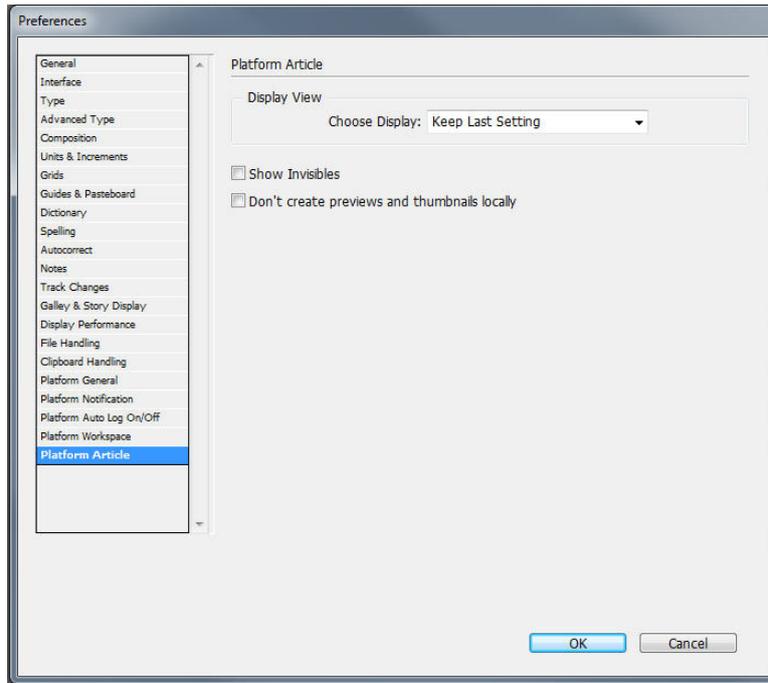
To control the font and size used in the **Workspace Browser** palette, use the controls in the **Font Options** area.

To indicate asset status with color outlines, check **Show Status Colors around Thumbnails**.

To specify what happens when you double-click an asset in the **Workspace Browser** palette, use the controls in the **Double-click Options** area.

### InCopy Preferences: Platform Article

The **Article** pane lets you control options related to the Quark Publishing Platform **Workspace Browser** palette.



The **Article** pane of the **Preferences** dialog box

To specify the initial article view when you check out, open, or display an InCopy article, click an option in the **Choose Display** area.

To automatically show invisible characters when you check out, open, or display an InCopy article, check **Show Invisible**.

By default, when you check in an InCopy article, Quark Publishing Platform PlugIns software creates and checks in a thumbnail and preview for that file. To prevent this, check **Don't create previews and thumbnails locally**.

# Working with App Studio

## App Studio interactivity

The Quark Publishing Platform Adapter for InDesign supports adding assets used in App Studio interactivity from the Platform.

The following table describes Platform support for App Studio interactivities in InDesign.

Interactivity	Platform Support	Description
360 Image	Yes	Use platform assets as images in 360 interactivity.
Animations	N/A	
App Issues screen link	N/A	
Buttons	Yes	Use asset from platform for open file interactivity to Apply Sound, Video, Animation and Open file on platform Assets.
Carousel (horizontal scrolling frame)	N/A	
Email	N/A	
Geo-location	N/A	
Hotspot & flip hotspot	N/A	
HTML5 widget	Yes	Use Platform HTML pages while applying HTML interactivity.
Page flip	N/A	
Page linking (hyperlink)	Yes	Use HTML page from platform while applying HTML interactivity.
Popup	N/A	
Taking a screenshot	N/A	
Vertical scrolling pages	N/A	
Vertical scrolling text columns	N/A	
Web link	N/A	
Zoomable image	Yes	Use Open File interactivity

Interactivity	Platform Support	Description
Audio	Yes	Use Audio assets from Platform and select Poster image from platform for Audio.
Slideshow	Yes	Use platform assets as images in slideshow.
Video	Yes	Use Video assets from Platform and select Poster image from platform for Video.

### App Studio export process

When uploading to the App Studio portal, assets are dynamically fetched from the Platform, assuring that you are including the latest versions of assets and removing dependencies on local assets.

To export an InDesign document to the App Studio portal:

- 1** Download the App Studio Exporter extension (for InDesign) to upload content to App Studio from the following site: [www.docs.appstudio.net/display/AppStudio/Downloads](http://www.docs.appstudio.net/display/AppStudio/Downloads).
- 2** Double click it and follow the steps to install using the Adobe Extension Manager.
- 3** Restart Adobe InDesign.
- 4** Open InDesign and open the App Studio Exporter **Window > Utilities > App Studio Export**.

# Indexed attributes

The Platform plugin will automatically fill out the following list of attributes when checking in an asset to the Platform server:

**Document:**

- Number of Pages
- First Page
- Last Page
- Layout Name (this is derived from the **Intent** supplied in the new document window)
- Content Type (**InDesign Document** for InDesign files and **InDesign Template** for template files)

➡ Text for full text search, thumbnail and previews are also extracted from the file

**Article:**

- Character Count
- Column Width
- Current Length
- Assigned Length
- Line Count
- Word Count
- Text Preview
- First Page
- Last Page
- Article Component ID
- Article ID
- Content Type

# Assigning assets

The **Assign** command creates a copy of the article in the active text frame or the graphic in the active graphic frame and routes it to a particular Quark Publishing Platform user. To assign an asset in the active InDesign document to a Quark Publishing Platform user:

- 1 Select a text frame or select a graphic frame containing a graphic.
- 2 Display the **Workspace Browser** window (**Platform** menu).
- 3 With the frame selected, click **Assign as Article** or **Assign as Picture** in the **Workspace Browser** window.
- 4 The **Check In** dialog box displays. Follow the instructions in *A Guide to Quark Publishing Platform*.

➔ You can also assign an article by choosing **Platform > Assign as Article**.

# Using Word content

You can attach a Microsoft Word .doc, or .docx file into an InDesign text frame. Once the Word file is attached, Quark Publishing Platform can update the text frame or article if the Word file changes.

- ➔ In InDesign, you cannot change text in a text frame that is attached to a Word file. If you need to edit such a file, do so in Word.
- ➔ You cannot check out a .doc, or .docx file in InDesign and InCopy.

To attach a Word file to an InDesign text frame:

- 1 Check the Word file into Quark Publishing Platform
- 2 Display the Word file in a **Workspace Browser** window.
- 3 Create an InDesign layout and save a revision of the file in Quark Publishing Platform. (If the file has not been checked into Quark Publishing Platform, you cannot drag content into that file from the **Workspace Browser** window.)
- 4 Drag the Word file from the **Workspace Browser** window to a text frame or to a blank area on the page. (If you drag it to a text frame that contains text, the text will be replaced.) The **Assign Article** dialog box displays.
- 5 Resize and reposition the text frame as desired.

# Other Quark Publishing Platform tasks

This Guide covers only tasks and features that are specific to Quark Publishing Platform Adapter for InDesign and InCopy. For a full description of the Platform functionalities available in InDesign and InCopy, see *A Guide to Quark Publishing Platform*. There, you can find in-depth discussions of tasks such as the following:

- Understanding how Quark Publishing Platform works
- Working with content types (New Content Types related to InDesign Document/Template & InCopy Document/Template were introduced in 9.5.2)
- Working with attributes (New Content Types related to InDesign/InCopy will have their own attributes)
- Working with Relationships
- Defining Roles & Privileges (New Privileges for the new Content types were added in 9.5.2)
- Administering a Quark Publishing Platform workflow
- Assigning and managing assets
- Routing and tracking
- Archiving and restoring
- Creating assets
- Appending content
- Checking in assets
- Assigning assets
- Performing a search
- Performing a nested search
- Performing full-text search
- Managing searches
- Using the Quick Search feature
- Checking out assets
- Cancelling a Checkout
- Using Read-Only to view an asset
- Using Get to get read-only copies of assets

## OTHER QUARK PUBLISHING PLATFORM TASKS

- Viewing and editing attribute information
- Saving a revision of an asset
- Customizing the Workspace window

# XML article renditions

When you check an InCopy article into Quark Publishing Platform from InDesign or InCopy, Quark Publishing Platform automatically creates an XML rendition of the article.

Quark Publishing Platform generates this XML rendition using the XSL file named "QPP Article.xsl." This file is installed in the "Plug-Ins" folder in the InDesign or InCopy application folder on each user's computer. By default, the "QPP Article.xsl" file creates an XML file that contains all of the information in each article.

You can customize the XML representations that Quark Publishing Platform generates by customizing the "QPP Article.xsl" file. If you customize this file, though, it is important to remember that a copy of this file is stored on each InDesign or InCopy user's computer, and it is this local copy of the file that is used to generate the XML representation on the server at check-in. So if you customize the "QPP Article.xsl" file, make sure that all users have an up-to-date version of this file installed on their computers.

# Legal notices

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