

Smart Content Toolkit Getting Started

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Introduction

The Smart Content Toolkit has everything you need to deploy the Smart Content Builder and Smart Content Designer, including optional samples.

The Smart Content Builder

The Smart Content Builder provides a user interface which enables anyone to quickly build, reuse, and assemble a Smart Content schema. Use the Smart Content Builder to create content models and establish a reusable vocabulary for structure and metadata. The publishing channel configuration features of the Smart Content Builder also help maximize opportunities for content automation.

The Smart Content Designer

The Smart Content Designer includes a familiar QuarkXPress interface for creating and previewing advanced Enterprise layouts without XSLT development. Use the Designer to create Smart Content templates, eliminating the need for manual programming in most cases.

- ➡ The installers for the Smart Content Toolkit can be downloaded from the following location: <https://quark.app.box.com/folder/53295843505>

System requirements

Software

- Smart Content Builder:
 - Windows Server 2012/2016
- Smart Content Designer:
 - macOS El Capitan (10.11.x), Sierra (10.12.x) or High Sierra (10.13.x)
 - Windows 10

Required components

- Quark Publishing Platform Server 14.0 (August 2018 Release)
- Quark Publishing Platform Client 14.0 (August 2018 Release)
- QuarkXPress Server 14.0.2
- QuarkXPress 14.0.2
- JDK 1.8

➡ The system requirements listed in this document include the most current patches and service packs.

Preparing to deploy the Smart Content Toolkit

This section lists the prerequisites needed to add the Smart Content Builder functionality to a Quark Publishing Platform instance and the Smart Content Designer XTensions to QuarkXPress.

Download and install the required Quark software components:

- QuarkXPress Server 14.0.2
- Quark Publishing Platform Server 14.0 (Gya Release)
- QuarkXPress 14.0.2
- Quark Publishing Platform Client 14.0 (Gya Release)

➡ For information on installing Quark Publishing Platform server and client, follow the instructions in the [Quark Publishing Platform Getting Started](#).

The Smart Content Toolkit consists of the following installer:

- A Smart Content Builder web application installer

Platform role privileges

A user must be assigned the following Platform role privileges in order to use Smart Content Builder:

- Users and Groups (View only)
- Content Types (View, Create/Modify)
- Attributes (View, Create/Modify)

Deploying the Smart Content Builder

Use the **Solution Configurator** to simplify the deployment process.

1. Copy `Smart Content Builder/Smart Content Builder (Beta)_18090609.zip` to the Quark Publishing Platform Server machine.
2. Extract the contents of **Smart Content Builder (Beta)_18090609.zip**.

Proceed with the Smart Content Builder deployment instructions.

Deployment instructions

Before you begin:

1. Close any open Platform server files.
2. Stop the Quark Publishing Platform Server.
3. Make a backup of existing Platform Server folders and data (recommended, but optional).

Deployment steps:

1. Launch the Solution Configurator and make the following selections:
 1. Choose your solution from the **Solution** drop-down menu.
➔ **Quark Shared Review** is shown in the example.
 2. Choose **Quark Publishing Platform Server** from the **Module** drop-down menu.
 3. Choose **Deploy Platform Server Configuration** from the **Action** drop-down menu.



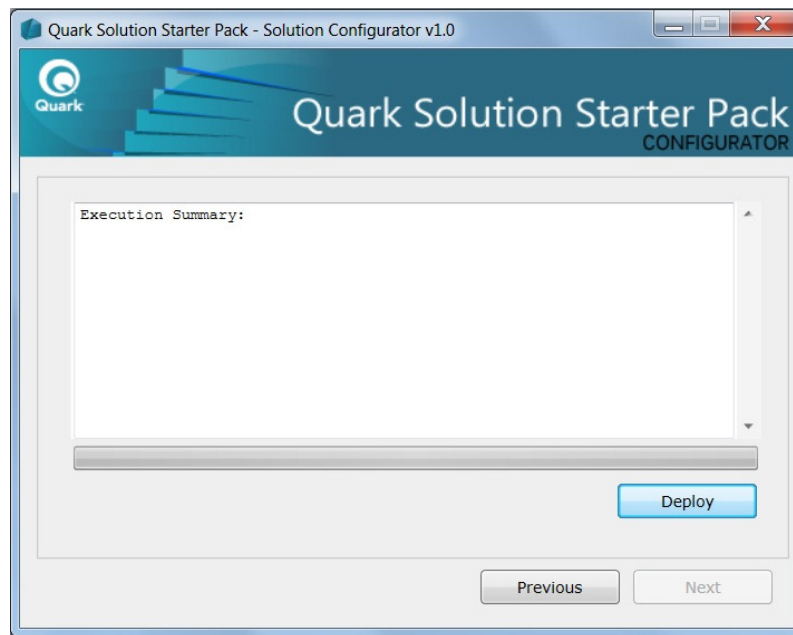
2. Click **Next**.
3. Select an installation location. This step is mandatory even though it may already show your correct installation path.

DEPLOYMENT INSTRUCTIONS

1. Click ... to browse the server file system.
2. Select the server installation folder for “Quark Publishing Platform.”
3. Click OK.
4. Select the repository location. This step is only required when you have **not** already configured the repository path in your Platform installation (the field can remain blank). If you select a repository path, your Platform repository path will be updated during solution setup.
 1. Click ... to browse the server file system.
 2. Select the desired data repository path.
 3. Click OK.
5. Add the Platform user name and password to be used while installing the solution configuration (typically the administrator account).
6. Click Next.



7. Deploy the solution:
 1. Click **Deploy**.
 2. Review the installation summary under **Status Info**. The solution typically deploys in a few seconds.
 3. Click **Home**.



8. Validate your deployment:

1. Start Quark Publishing Platform.
2. Confirm that no errors appear in the Platform Server logs.

➡ Solution Configurator logs appear in
"%APPDATA%\Quark\SolutionConfigurator\buildlog{Date_Time}.txt"

Deploying the samples

- ➡ Please note that installing samples is **optional** and **requires a clean instance of Quark Publishing Platform Server**.

Quark provides some sample documents as a part of the Smart Content Toolkit to facilitate hands-on learning. To deploy these optional samples on Platform Server, run the Solution Configurator as described below.

1. Copy `Smart Content Toolkit Samples/Samples.zip` to the Quark Publishing Platform Server machine.
2. Extract **Samples.zip**.

You are now ready to proceed. To deploy the samples, repeat the steps listed in the [Deployment instructions](#) section, only use the solution configurator located inside the extracted **Samples** directory.

After deploying the samples, you can confirm they installed correctly by launching Smart Content Builder. Restart the Quark Publishing Platform Server service and launch Platform using this URL: `http://[server-name:port]/builder`

Deploying Fonts used in samples

If you choose to install the samples supplied by Quark, please download the following fonts used in the samples:

- Roboto Condensed
- Oswald
- Ubuntu
- Raleway
- PT Serif
- Open Sans

Installing fonts is optional, but is recommended to ensure that all required fonts used in sample documents are available for use.

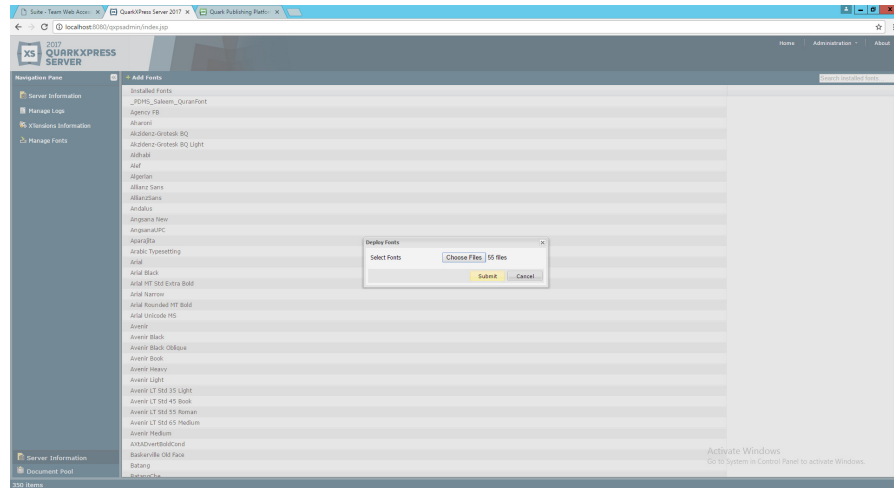
➡ Please note that you can replace the fonts used in the samples. You may obtain free-to-use fonts from relevant sources like [Google Fonts](#).

Installing fonts for QuarkXPress Server

Install fonts using the QuarkXPress Server Admin client:

1. Launch QuarkXPress Server Admin Client on a browser.
2. Click **Manage Fonts**.
3. Click **Add Fonts**.
4. Locate the fonts folder and select all files.
5. Click **Open** to add these fonts to the server.
6. Click **Submit** in the **Deploy Fonts** dialog box.
7. Click **OK** when prompted to reset all the renderers.

DEPLOYING FONTS USED IN SAMPLES



Installing Fonts for QuarkXPress

Install fonts on the client machine where you installed QuarkXPress to properly see the preview in the Smart Content Designer preview palette.

Deploying the Smart Content Designer

Smart Content XTensions

The Smart Content XTensions for QuarkXPress Server are part of the QuarkXPress Server installation. The Smart Content XTensions for QuarkXPress desktop are part of the Quark Publishing Platform Client installation. These do not have to be installed separately.


Deploying Quark Publishing Platform Client for QuarkXPress

For information on installing Quark Publishing Platform Client, follow the instructions in the [Quark Publishing Platform Getting Started](#).


- ➡ Quark Publishing Platform Client for QuarkXPress is required to run Smart Content Toolkit

Once you launch QuarkXPress, you must provide the Quark Publishing Platform settings needed to connect QuarkXPress to the Smart Content Builder server.

Log On

 2015 PUBLISHING PLATFORM

User Name:

Password: 

Server Name: :

Protocol: ☒ HTTP ☐ HTTPS

☐ Remember Me

☐ Do Not Show This Dialog Box Again

Working with Sample Documents

This section describes the optional steps to verify the sample documents and fonts deployed earlier.

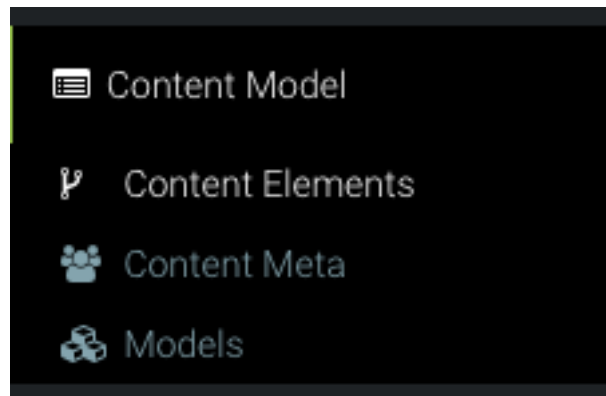
1. To view the document models for these sample documents, visit the following URL:

`http://<server name/ip>:<port>/builder`
2. To view PDF renditions that use Smart Content Designer templates, open the Quark Publishing Platform workspace and browse to any collection.
3. Open the Smart Content document present in the sample collections using Quark Author.
4. In Quark Author, select renditions with the name "<Collection Name> PDF." For example, choose "QuarkXPress User Guide PDF" for a user guide document to see the PDF rendition created using the Smart Content Designer sample templates.

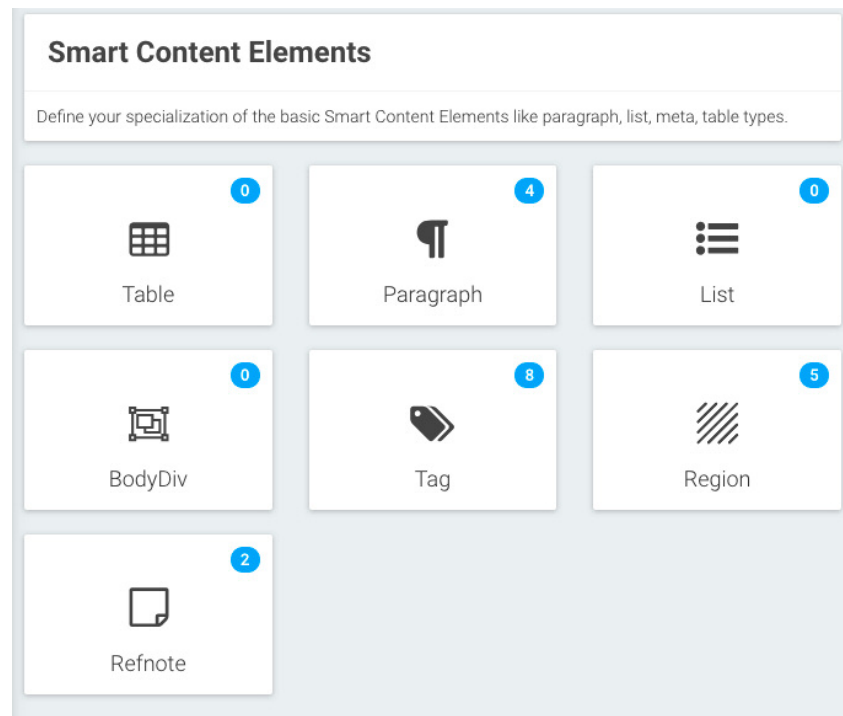
Working with Smart Content Builder

To create a Smart Content Model using Smart Content Builder:

1. Open the Smart Content Builder app using `http://<server name/ip>:<port>/builder`.
 2. Log on with user credentials.
- ➡ This user must have permissions as described in *Platform role privileges*
3. Expand the **Content Model** tab.



4. Create content elements using the **Content Elements** tab (Para types, Table types, List types, BodyDivs, Tag types, Regions, Refnotes).



5. Define your content metadata elements in the **Content Meta** tab. The possible types of metadata are:
- **Attribute** - defines a basic metadata element of key-value type.
 - **Group** - defines a complex metadata element by combining various attributes.
 - **Collection** - this is similar to a group, defining a complex metadata element by combining various attributes, but can hold multiple values of the complex metadata element (just like an array).

| Meta Elements 24 | | |
|---|-----------------------|--|
| <div> <div>Add ▾</div> <div> <div>Search</div> <div>Q</div> </div> </div> | | |
| Name | Category | |
| Copyright Statement | Attribute | |
| Language | Attribute | |
| Keywords | Attribute(Multivalue) | |
| Dates | Group | |
| Approved On | Attribute | |
| <div> <div>«</div> <div><</div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>></div> <div>»</div> </div> | | |

6. Use the **Models** tab to create a new Smart Content Model.
7. Click **Add** and add the definition of the model as required.

| | | |
|---|--------------------------------|--|
| <div> <div>Update</div> <div>Group ▾</div> <div>Choice ▾</div> <div>Occurrence ▾</div> <div>Remove</div> </div> | | |
| | ▼ Standard Operating Procedure | |
| | Purpose | |
| | Scope | |
| | ▼ Procedure | |
| | ▼ Step | |
| | Sub Step | |
| | ▼ Glossary | |
| | Glossary Term | |
| | References | |
| | Legal Notice | |

8. Click **Editor Configuration** in front of a content type to add publishing channels to the content type and to update all panel configurations

Add

| Publishing Channel | Display Name | Output Format |
|--------------------------|-------------------|---------------|
| smartDocPdf | PDF | PDF_ARCHIVE |
| smartDocHtml5Publication | HTML5 Publication | HTML_ARCHIVE |
| smartDocHtml | Responsive HTML5 | HTML_ARCHIVE |
| smartDocJpeg | IMAGE | IMAGE_ARCHIVE |

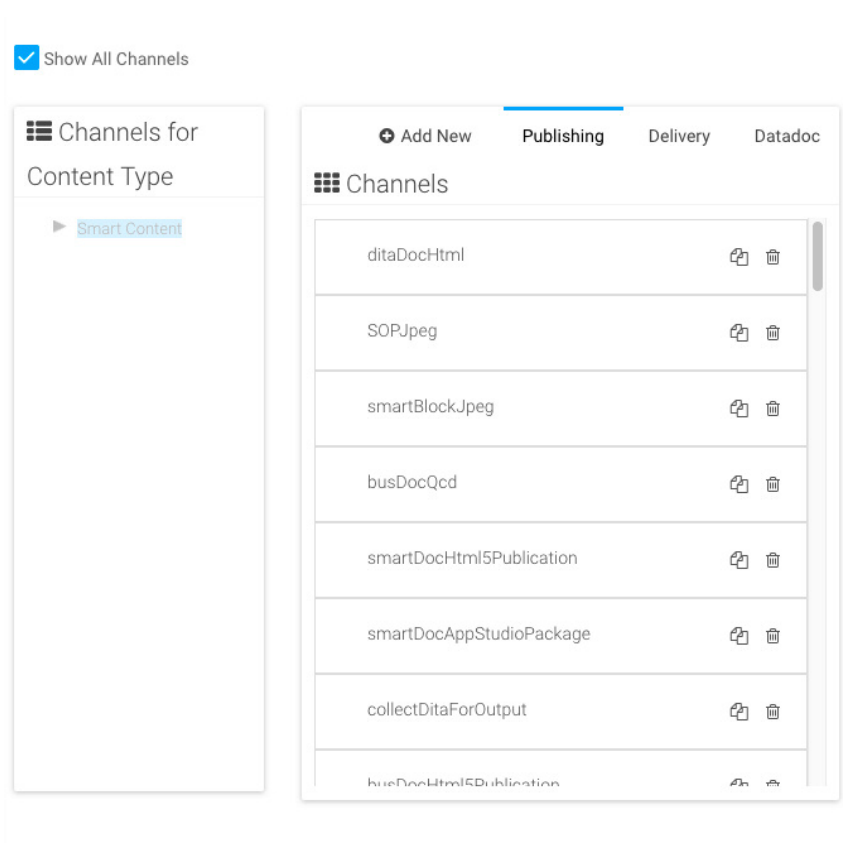
Panel Configuration

☐ Collapse Left Panel
☐ Hide Left Panel
☐ Collapse Right Panel
☐ Hide Right Panel

Add

| Name | Mode | Position |
|--------------|------|----------|
| smartdoctree | any | left |

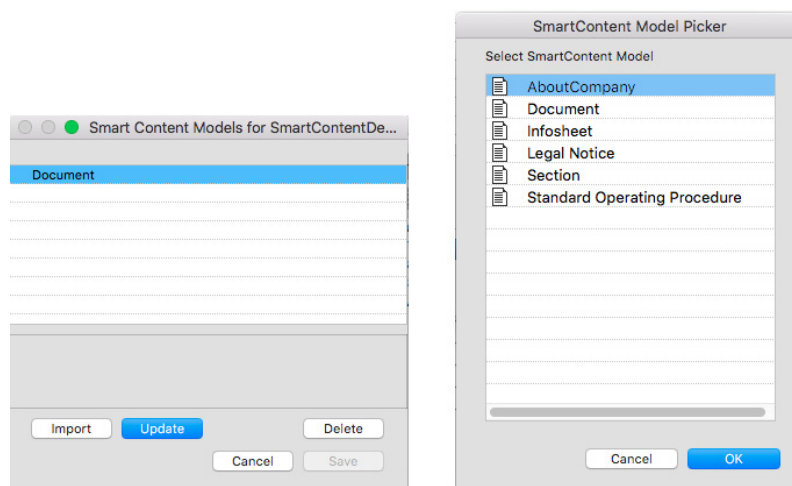
- Use the **Automation Channels** tab to define all publishing, delivery and datadoc channels, and map them to the respective content types.



Working with Smart Content Designer

To design a template in Smart Content Designer:

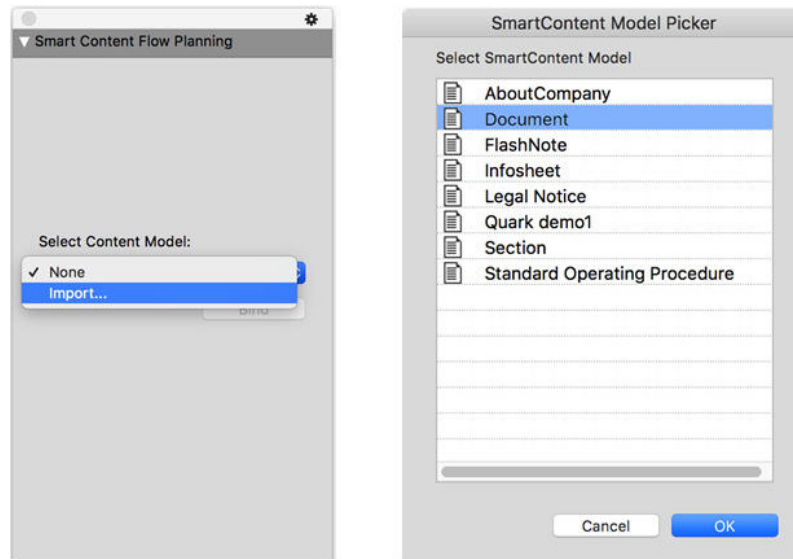
1. Launch QuarkXPress.
2. Log on to Quark Publishing Platform Server.
3. To import smart content models, do one of the following:
 - Open the **Smart Content Models** dialog (**Edit -> Smart Content Model**), click **Import** and import a new Smart Content Model from the server using the **Smart Content Model Picker**.



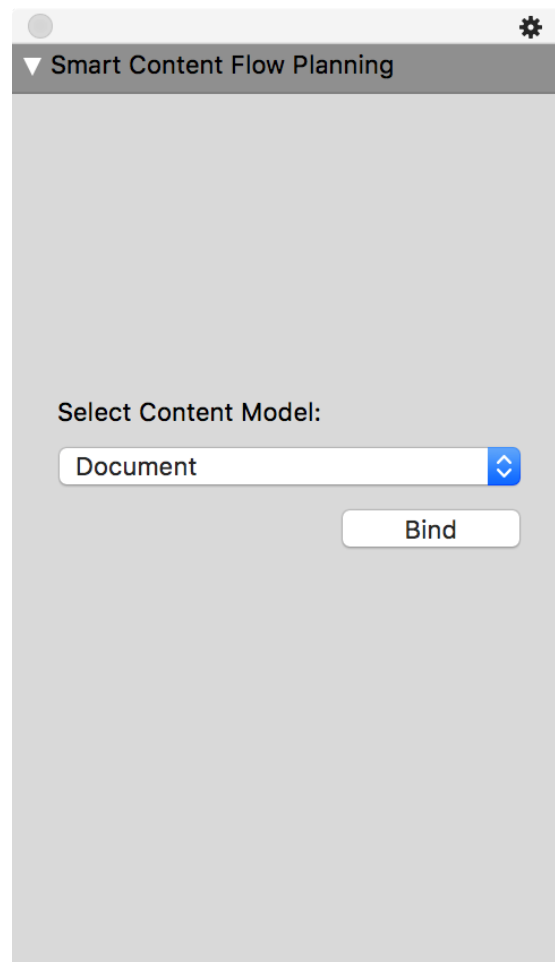
- ➡ This method can be done without having a QuarkXPress project open. Import as many models as you want, which will then be available in your QuarkXPress application to bind with any QuarkXPress project.

OR

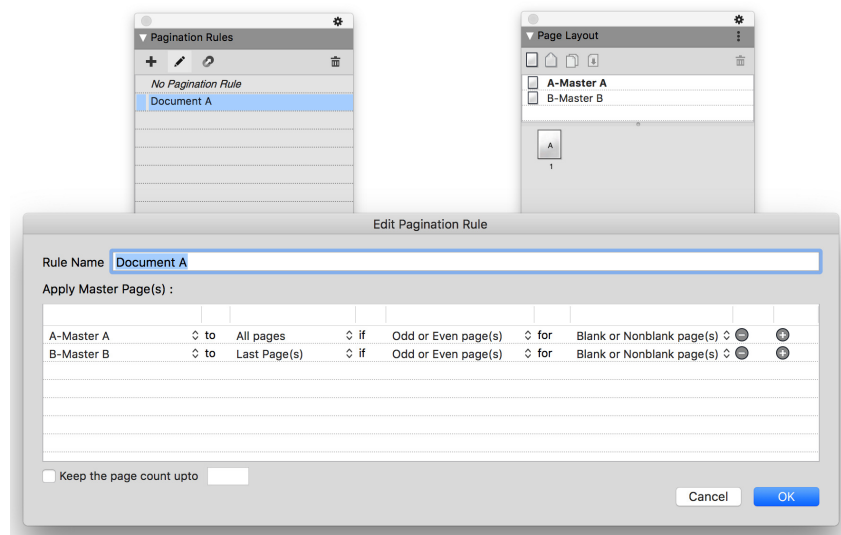
- Open the **Smart Content Flow Planning** palette (**Window -> Smart Content Flow Planning**), choose **Import...** from the drop-down menu, and import a new Smart Content Model from the server using the **Smart Content Model Picker**.



4. Open the **Smart Content Flow Planning** palette (**Window -> Smart Content Flow Planning**), select a content model and choose **Bind** to bind the content model to the current project.

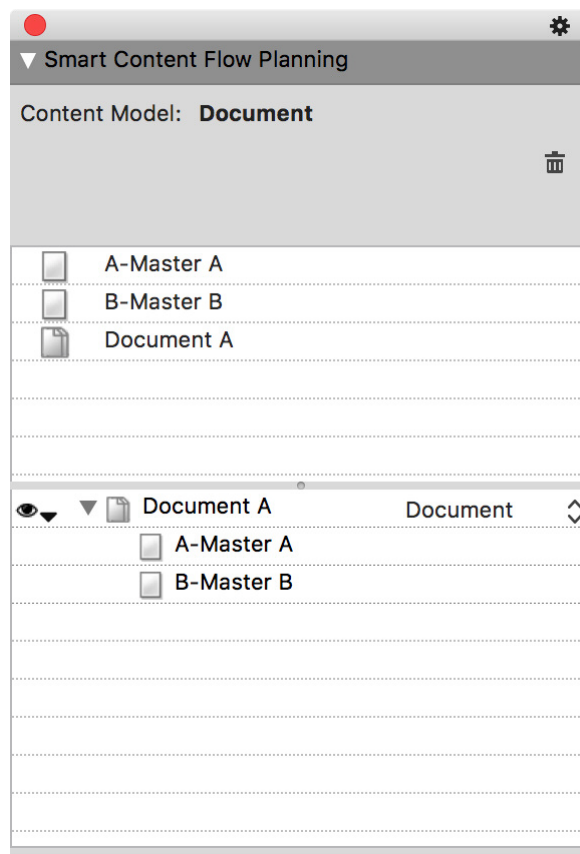


5. Create master page sequence using the **Pagination Rules** palette. You can define different master pages for first, rest and last pages. The example below has defined the last page to be different from the rest of the pages.



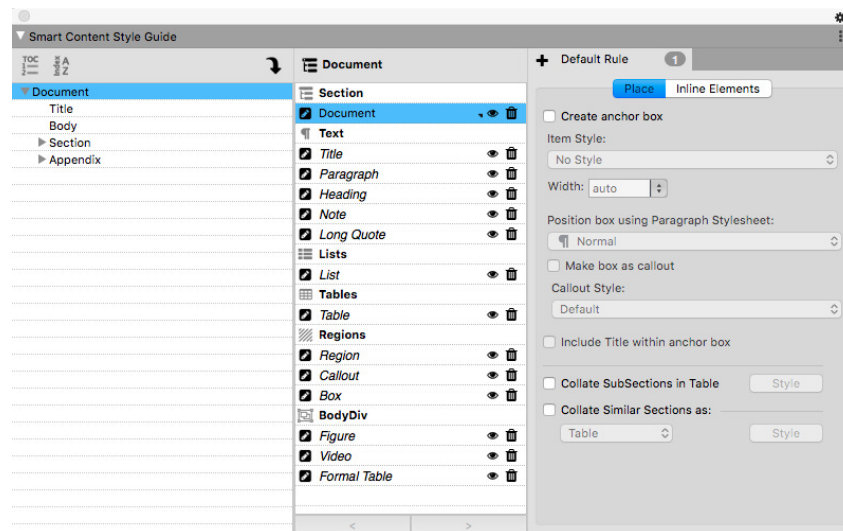
➡ Skip this step if you do not wish to apply pagination rules.

6. Drag and drop master pages or a master page sequence to the flow as required in the **Smart Content Flow Planning** palette.

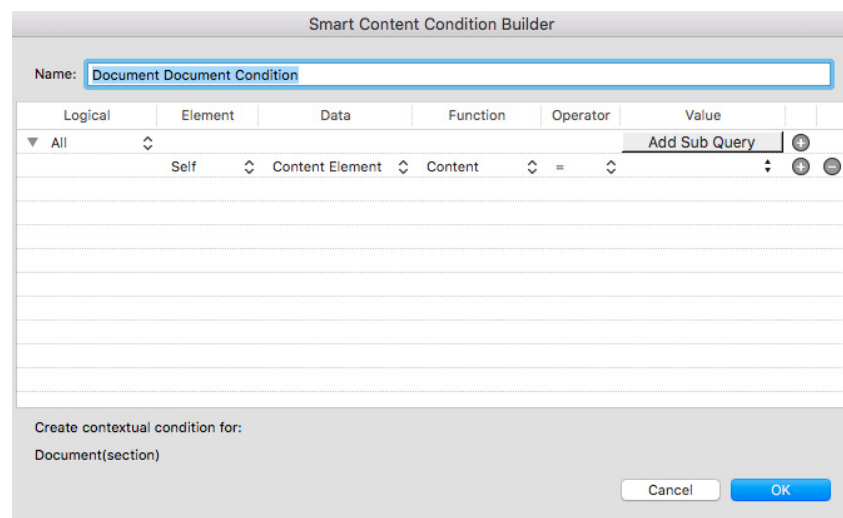


➡ You must drag and drop at least one master page to the flow in order to continue.

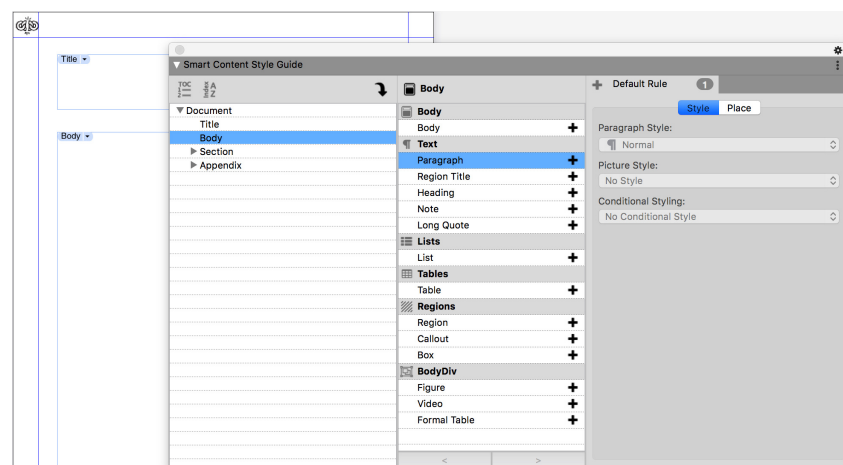
7. Create required style sheets and item styles and bind them to schema elements using the **Smart Content Style Guide** palette.



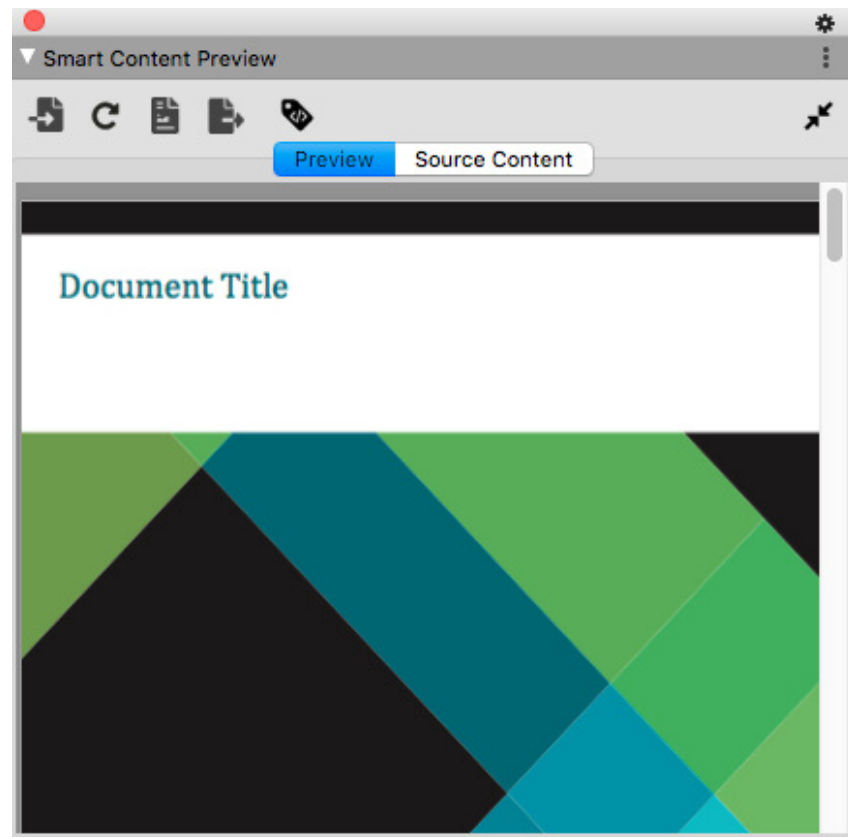
8. Apply conditional styles to elements using the **Smart Content Condition Builder** dialog.



9. Map XML elements to layout elements on the document canvas.



10. Open the **Smart Content Preview** window to see a preview of the designed template.



11. Click **Import XML** and select the xml file from the server or the local file system.
12. Click **Preview/Template Layout** to see a preview of the template with the selected xml content.

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