Quark XML Author 2015 - June 2017 Update for Platform with DITA

Contents

Getting started

The staff of Quark Software, Inc. would like to thank you for selecting Quark XML Author for Microsoft Word to be part of your XML authoring solution.

About Quark XML Author

Quark® XML Author is a software add-in that allows you to author the content of a complex XML document in the user-friendly authoring environment of Microsoft® Word.

Quark XML Author was developed specifically for Microsoft Word. It provides a user-friendly authoring environment for creating structured documents based on XML (Extensible Markup Language). XML is the W3C® standard for representing structured data. Structured documents created in XML facilitate the repurposing and reusing aspect of content management systems. Using XML Author, a worker can author complex XML-based documents in Word without concern for the technical aspects of XML and its syntax.

Quark XML Author provides a natural authoring experience for knowledge workers while satisfying an organization's requirement to produce proprietary structured content.

So rather than editing content in an XML editor and having to understand all the XML syntax you can work in Quark XML Author, an XML word processor, and edit content in an interface that is familiar and comfortable.

The images below show an example of a document being authored on the Quark XML Author canvas in a word processing environment, followed by the corresponding XML content.

Setting the (ASA) Light Sensitivity

The Light Sensitivity or ASA feature is used to control how fast light is absorbed by a light receptor. The higher the number is, the faster the rate at which light is absorbed. This is helpful in low light situations, but the cost is a lower quality image. The lower the number is, the slower the rate at which light is absorbed. This gives a higher quality image, but requires a higher amount of light than is typically found indoors.

To set the (ASA) light sensitivity, perform the following steps:

1. Press the wheel to activate the menu.
2. In the menu, select Features then (ASA) Light Sensitivity.
3. Choose one of the following settings:

Word processor view.

```
<title>Setting the (ASA) Light Sensitivity</title>
  <body>
    <p widow-orphan="true" xml:id="IDf9f29fdc-0ace-4a68-a04f-205f4bdf90ab">
    The Light Sensitivity or ASA feature is used to control how fast light is
    absorbed by a light receptor. The higher the number is, the faster the
    rate at which light is absorbed. This is helpful in low light situations,
    but the cost is a lower quality image. The lower the number is, the slower
    the rate at which light is absorbed. This gives a higher quality image, but
    requires a higher amount of light than is typically found indoors.</p>
    <p widow-orphan="true" xml:id="ID89b29d84-4b32-4c04-bd5e-7e42fcff1f71">
    To set the (ASA) light sensitivity, perform the following steps:</p>
    <ol xml:id="ID1d1a9970-5e3c-489b-8538-e577f96f5223">
      <li widow-orphan="true" xml:id="IDb3d66cd2-c746-4de8-91d5-7f6d3f320191"
      outputclass="1.">Press the wheel to activate the menu.</li>
      <li widow-orphan="true" xml:id="ID5dcde90c-633c-494f-b841-19de99a3086d"
      outputclass="2.">In the menu, select Features then (ASA) Light Sensitivity.</li>
      <li widow-orphan="true" xml:id="IDdc0ca089-99c1-4831-8cbf-46091fc5b9d1"
      outputclass="3.">Choose one of the following settings:</li>
    </ol>
  </body>
</topic>
```

XML content.

Resources on DITA

Listed below is a partial list of books, white papers, and websites on DITA.

Books:

- *Introduction to DITA: A User Guide to the Darwin Information Typing Architecture*, by Jennifer Linton and Kylene Bruski

- *Practical DITA*, by Julio Vazquez

- *DITA 101: Fundamentals of DITA for Authors and Managers*, by The Rockley Group

Websites, Users Groups & Forums:

- OASIS DITA Community,www.dita.xml.org

- CoverPages (another online resource hosted by OASIS), www.xml.coverpages.org/dita.html

- DITA developerWorks Articles from IBM, www.dita-ot.sourceforge.net/SourceForgeFiles/doc/DITA-dWarticles.html

- DITA Open Toolkit (on the SourceForge website), www.sourceforge.net

- Yahoo DITA Group, *www.tech.groups.yahoo.com/group/dita-users/*.

Working with the repository

Creating a new topic from a repository template

You can create new topics directly in Quark XML Author from a repository template.

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

To create a new topic:

1 Choose **File > New XML Author**.

2 In the **XML Author** menu, choose **New Topic from Server Template**.

The **Select Template** dialog displays.

3 Navigate to the repository folder that contains the desired template.

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

   • 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 result displays.

➡ You can choose to view the results in either ▦ list view or ▤ snippet view.

5 Select the template.

6 Click **OK**.

The topic is created in Quark XML Author and is ready for authoring.
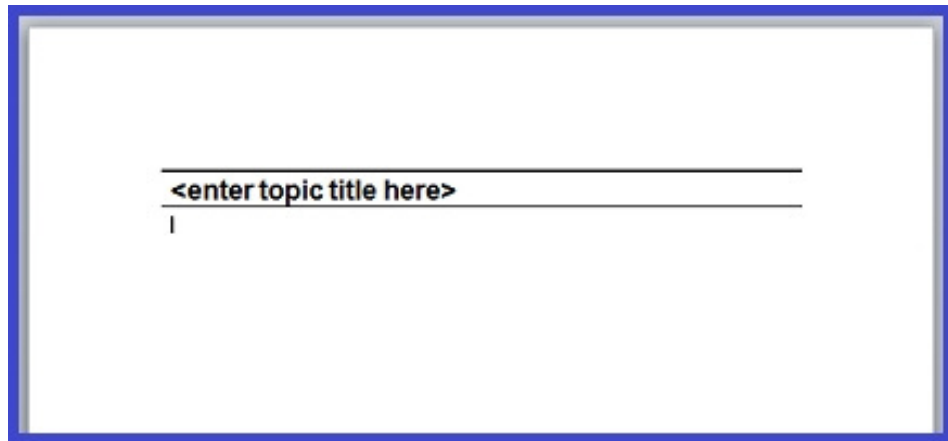
<enter topic title here>

When you are finished authoring, save the topic to the repository. Content components within this will then be available for referencing by other documents.

Opening a repository topic for editing

You can open repository topics from Quark XML Author.

To open a topic for editing:

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

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

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

   • 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 result displays.

➡ You can choose to view the assets in either ⊞ list view or ⊞ snippet view.

4 Select the topic.

5 To open an earlier (specific) version of a topic, click the **View Revisions** button. Choose the desired version number from the list.

➡ Earlier versions can only be opened read-only.

6 Click **Open**.

The topic displays in Quark XML Author, ready for editing.
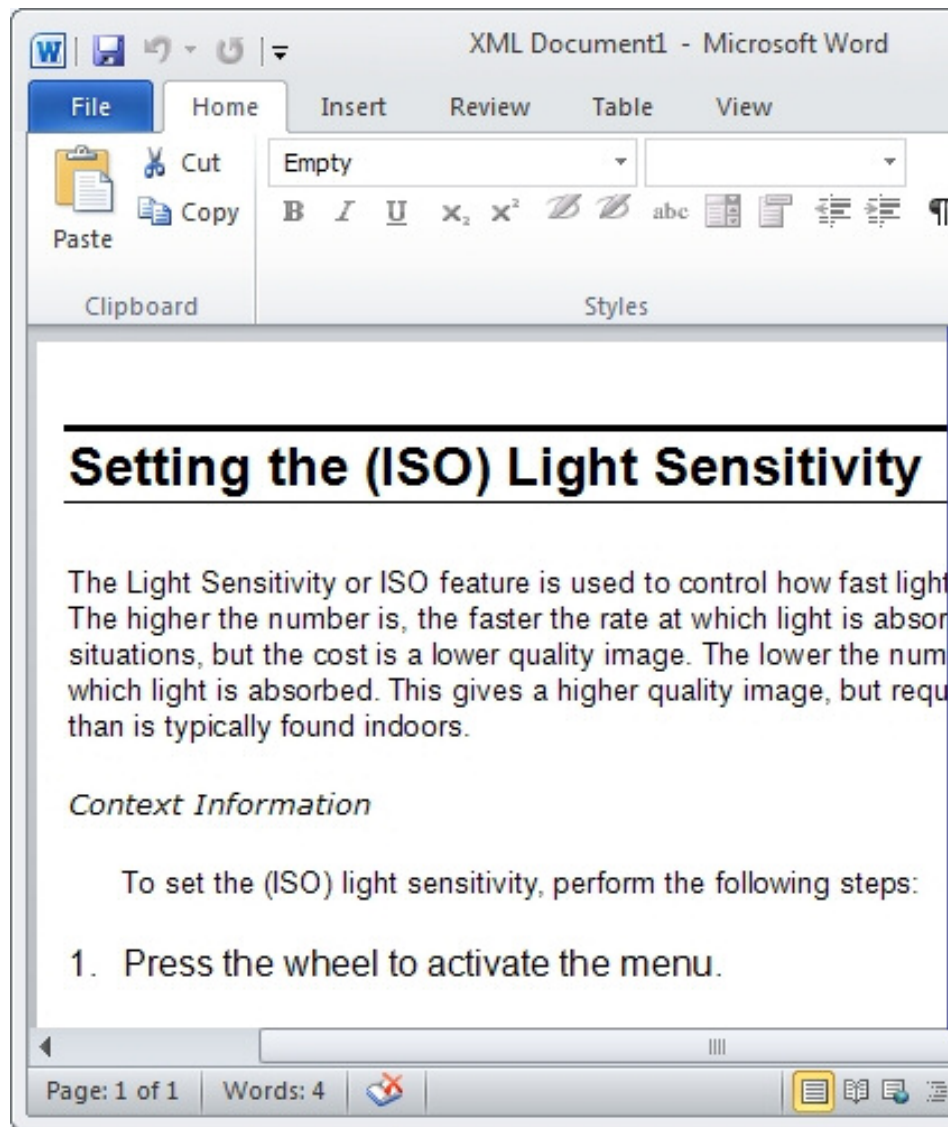
The view in your repository software and the **Open from Server** dialog show the file

with the checked out icon.

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

Opening a repository topic for viewing

You can open repository topics from Quark XML Author.

To open a topic 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 topic.

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

- 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.

➡ You can choose to view the results in either ⊞ list view or ⊞ snippet view.

4 Select the topic.

5 To open an earlier (specific) version of a topic, click the **View Revisions** button. Choose the desired version number from the list.

➡ Earlier versions may only be opened read-only.

6 Click **Open as Read Only**.

The topic displays in Quark XML Author, ready for Viewing.
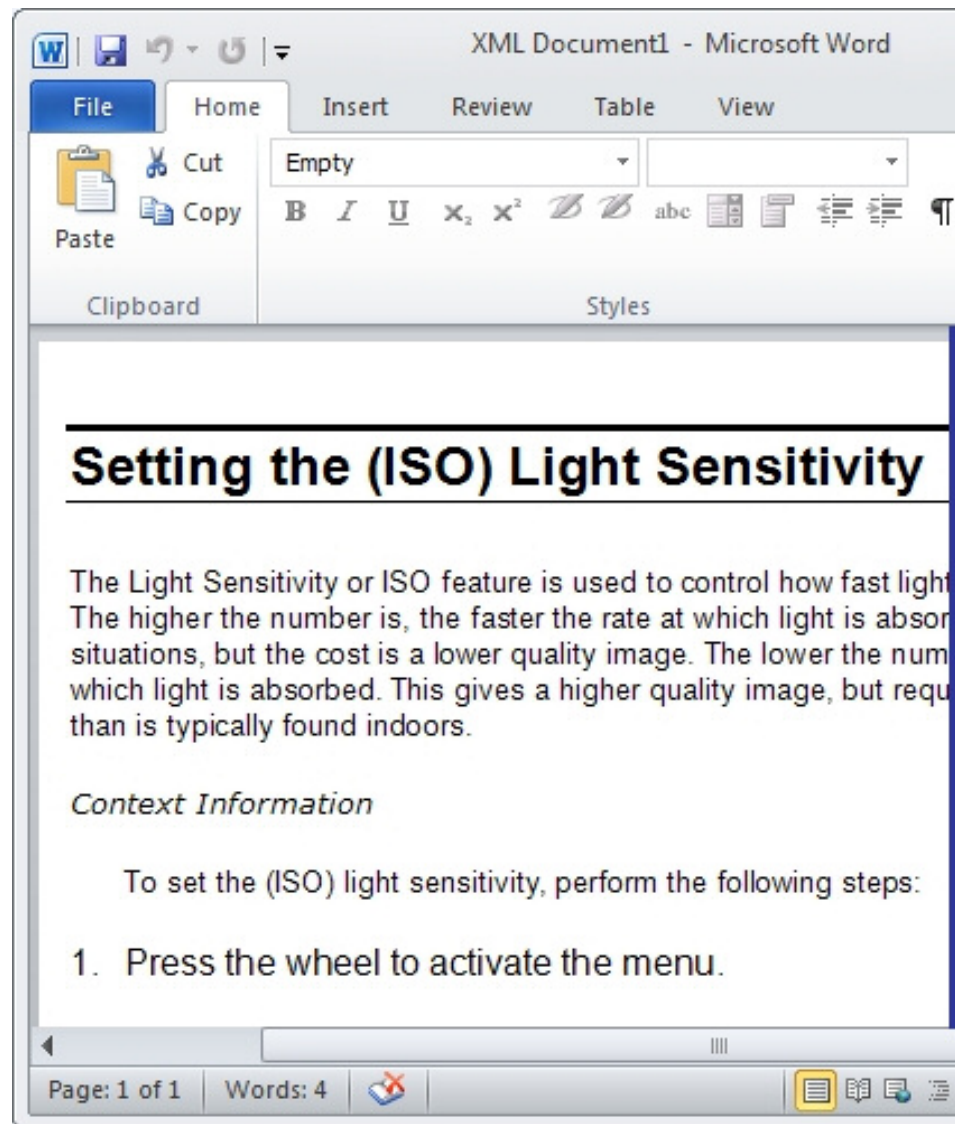
The view in your repository software and the **Open from Server** dialog show the file without the checked out icon.

The **Checked Out by** remains cleared.

Checking out a topic

You can check out and edit topics that are opened for viewing from Quark XML Author.

The topic must already be open in read-only mode in Quark XML Author.

If the currently open topic is not the latest version, it will be closed. The latest version will be opened and checked out.

To check out an open topic:

- Choose **File > Platform > Edit**.

The topic 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 topic to the repository. Content components within this topic will then be available for referencing by other topics

Saving topic revisions

You can save and check in a topic from Quark XML Author. Components within the topic will be available for referencing by other topics. For new topics, specify the desired repository folder and filename.

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

To save a revision of a topic:

1 Perform one of the following:

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

- To close topics: Choose **File > Info > Save to Server & Close**.
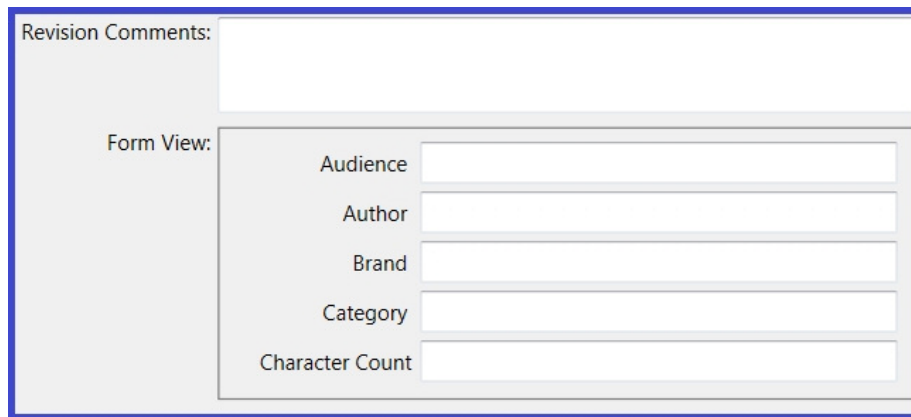
The **Save** dialog box displays. The dialog box displays repository-related information about the topic you are saving.

➡ You are not allowed to change the location of the document when you are saving a revision. This can only be done when you are doing a Save and Close of a topic.

2 If you do not need the **Repository View** it can be collapsed. This is useful if a **Form** view is displayed 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.

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

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

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

8 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.

9 In **Revision Comments**, explain what was changed in the topic.

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

10 If the dialog box includes a Form View, complete these additional fields.

Revision Comments:	
Form View:	Audience
	Author
	Brand
	Category
	Character Count

11 For new topics, specify the desired repository folder and filename.

12 Click **Save**.

The current version of the topic is saved to the repository. If you chose to keep the topic open, the topic status is checked out and the view in your repository software

and the **Open** dialog show the file with the checked out icon.

➡ Edited attribute values will be retained on changing the collection or the workflow of an asset, unless these values are not applicable in the selected Collection.

➡ If the topic includes validation rules, these are evaluated when you attempt to save the topic. 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 topic 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.

Discarding changes and check out

You can use the **Discard Changes** feature to cancel the check out of a topic. All authoring changes will be discarded.

The topic must already be open in Quark XML Author.

To discard check out:

1 Click **File > Info > Discard Changes**.

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

Changes made to the topic since it was checked out are discarded and the topic 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.

System setup and preferences

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

➡️ Some preferences are not modifyable 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.
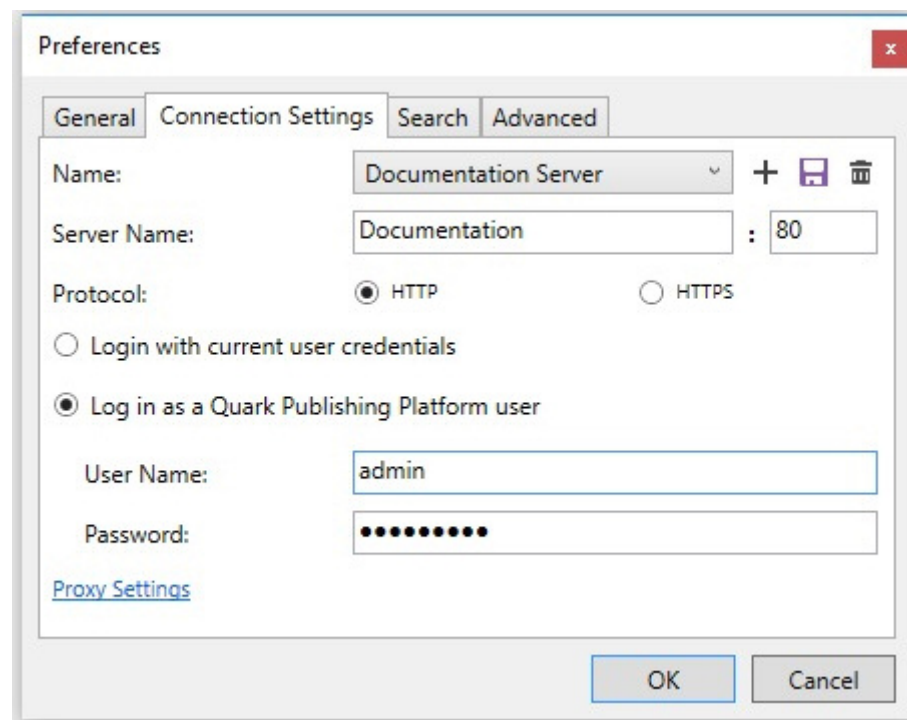
3 Specify the repository log on information provided by your system administrator.

➡ 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.

Specifying the location of checked-out documents

The Preferences feature is used to specify the folder that should be used for storing local copies of documents checked-out from the repository. Select the root folder, then additional folders that mimic the repository collection folders will be created under this root folder. For example, `C:\Users\username\Documents\Quark Software Inc\Quark XML Author\MyCollection`.

To specify the location:

1 Choose **File > Preferences**.

2 Click the **General** tab.
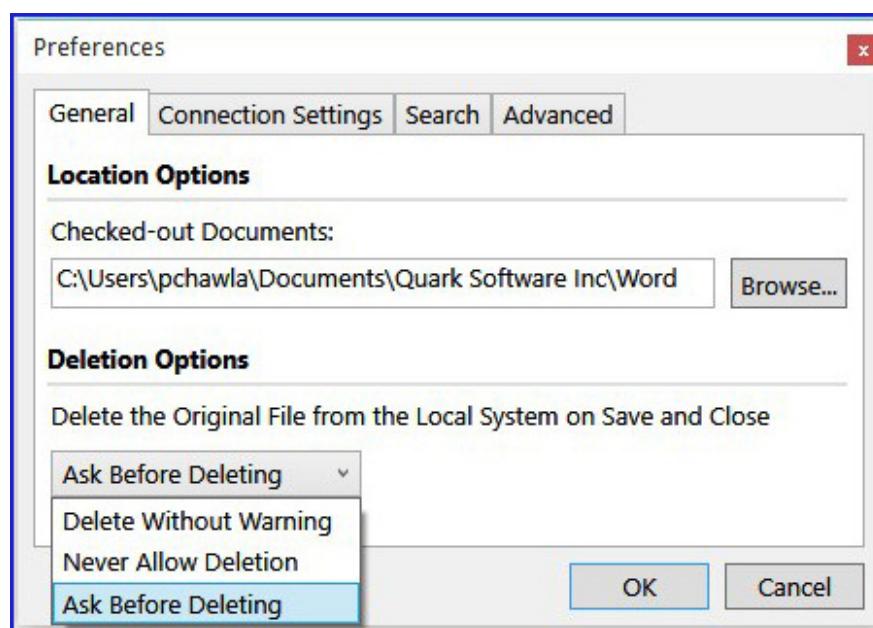
3 In **Checked-out Documents**, use the **Browse** feature to select the desired folder.

4 Click **OK**.

The location for checked-out documents is set.

Specifying quick search criteria

The Quick Search feature in the Open from Server dialog is configured using the Preferences feature.

To specify the criteria:

1 Choose **File** > **Preferences**.

2 Click the **Search** tab.
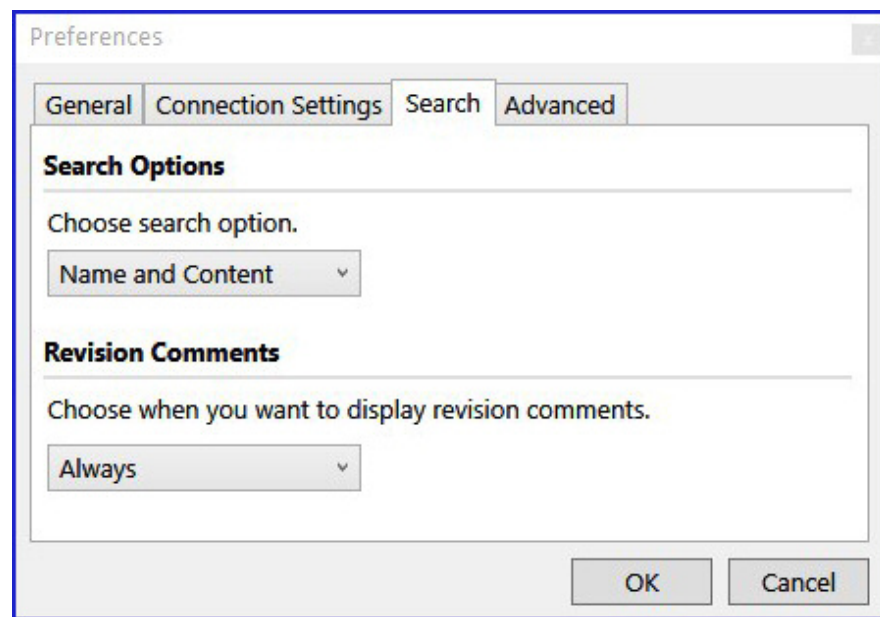
3 In **Search Options**, select whether you want to search in filenames, the content of the document or both.

- Name

- Content

- Name and Content

4 Click **OK**.

The specified criteria will be searched when the Quick Search feature is used.

Displaying revision comments when opening documents

The Revision Comments entered in the most recent check-in can be displayed in a dialog immediately after a document is opened and before the user begins editing.

To specify the revision comment setting:

1 Choose **File** > **Preferences**.

2   Click the **Search** tab.
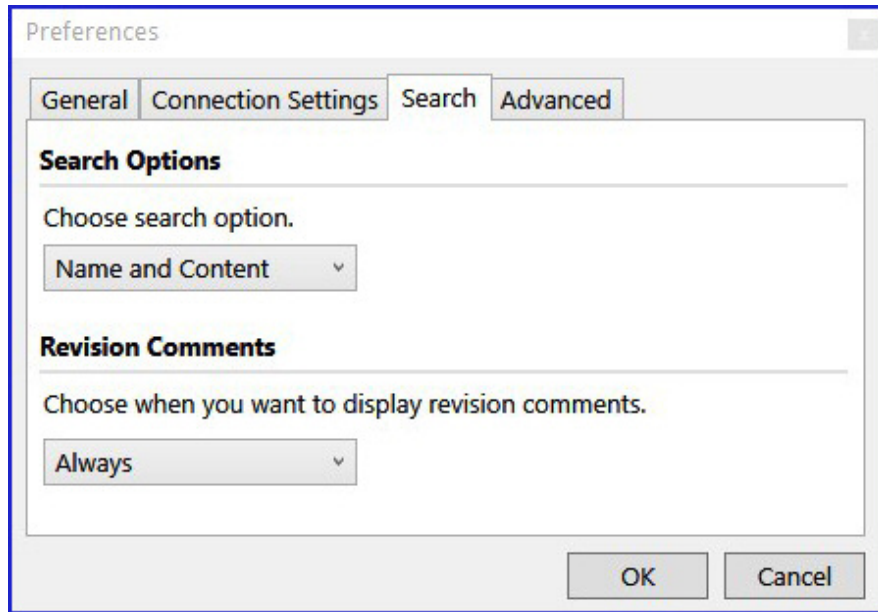
3   In **Revision comments**, select when to display revision comments:

- Always

- Never

- New Assignments

4   Click **OK**.

The specified revision comment setting is stored.

Deleting local copies of new documents

If you save a new document locally, the local copy is deleted when you save the document to the repository. You may specify if you want the system to prompt you before deleting the local copy or if the document can be deleted.

To specify delete settings:

1   Choose **File > Preferences**.

2   Click the **General** tab.
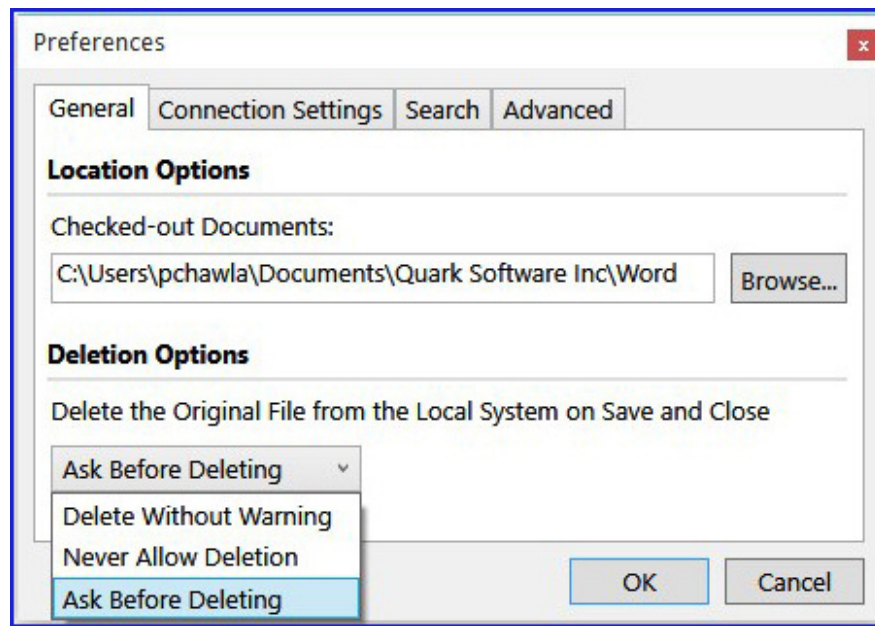
3 In **Deletion Options**, select one of the following:

- Ask Before Deleting

- Delete Without Warning

- Never Allow Deletion

4 Click **OK**.

The selected setting is stored.

Resetting setup and preferences settings

All settings specified in the **Preferences** dialog can be reset to the default values set at installation. This includes the default configuration setting.

To reset the settings:

1 Choose **File > Preferences**.

2 Click the **Advanced** tab.
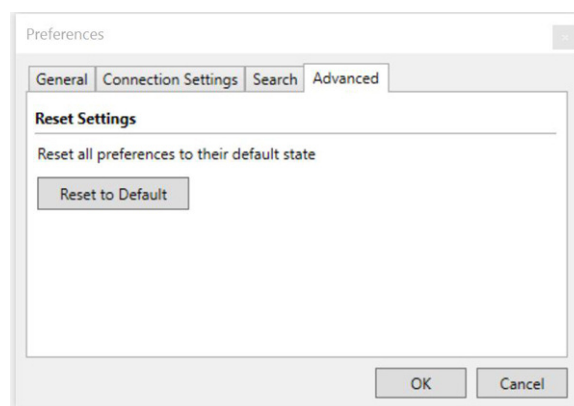
3 Click **Reset to Default** to reset all preferences to their default state.

4 Click **OK**.

All settings specified in the **Preferences** dialog box are reset.

Working with maps

This section describes map-related features in Quark XML Author.

Basic map features

Quark XML Author for Quark Publishing Platform provides basic file operations, including **New**, **Open** (Check Out), and **Save** (Check In).

About maps, table of contents, and more

A DITA map describes a publication. It contains the table of contents (TOC) and lists all topics that are part of the publication (even if they are not part of the TOC).

To create the TOC for a document, add topic headings and topicrefs to your DITA map. Topic headings and topicrefs may contain child topic headings and topicrefs, allowing you to create a hierarchy. This hierarchy becomes the hierarchy of chapters and sections in exported PDF, HTML, and HTML Help publications.

Creating a new DITA map

You can create DITA maps directly in Quark XML Author.

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

1 Choose **File > New XML Author**.

2 From the **XML Author Templates** menu, choose **Map**.

3 Replace the default map title text with the desired title for the map.

The map is created and ready for authoring.

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

Opening a repository map for editing

You can open repository maps from Quark XML Author.

➡ Maps can also be checked out and opened for editing from within Quark Publishing Platform. See *A Guide to Quark Publishing Platform* for more information.

To open a map for editing:

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

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

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

- 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. Click the desired search.

The search results are displayed.

➡ You can choose to view the assets in either ⊟ list view or ⊞ snippet view.

4   Click on the map.

5   To open an earlier (specific) version of a map, click the **View Revisions** button. Click the desired version number in the list. The latest version number is displayed at the top of the list. Earlier versions may only be opened read-only.

6   Click **Open**.

The map is displayed in Quark XML Author, ready for editing.

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

checked out icon. ✔

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

Opening a repository map for viewing

You can open repository maps from Quark XML Author.

➡ Maps can also be opened for viewing from within Quark Publishing Platform. See *A Guide to Quark Publishing Platform* for more information.

To open a map for viewing:

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

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

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

- 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. Click the desired search.

The search results are displayed.

➡ You can choose to view the assets in either ⊟ list view or ⊞ snippet view.

4   Click on the map.

5   To open an earlier (specific) version of a map, click the **View Revisions** button. Click the desired version number in the list. The latest version number is displayed at the top of the list. Earlier versions may only be opened read-only.

6   Click **Open as Read Only**.

The map is displayed in Quark XML Author, ready for viewing.

The view in your repository software and the **Open** dialog show the file without the checked out icon.

The **Checked Out by** field remains cleared.

Checking out a map

You can check out and edit maps that are opened for viewing from Quark XML Author.

The map must already be open in Quark XML Author.

If the currently open map is not the latest version, it will be closed. The latest version will be opened and checked out.

To check out an open map:

Click **File > Info > Edit**.

The map 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 map to the repository.

Saving map revisions

You can save and check in maps from Quark XML Author.

The map must already be open in Quark XML Author.

The map and components within the map will be available for referencing by other maps.

For new maps, specify the desired repository folder and filename.

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

To save a revision of a map:

1 Perform one of the following:

- To keep document open: Click **File > Info >Save Revision to Server**.
- To close document: Click **File > Info >Save to Server & Close**.

The **Save** dialog box is displayed. The dialog box displays repository-related information about the map 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 map.

2 If you do not need the **Repository View** it can be collapsed. This is useful if a **Form** view is displayed which can make the vertical length of the dialog extend beyond the screen.
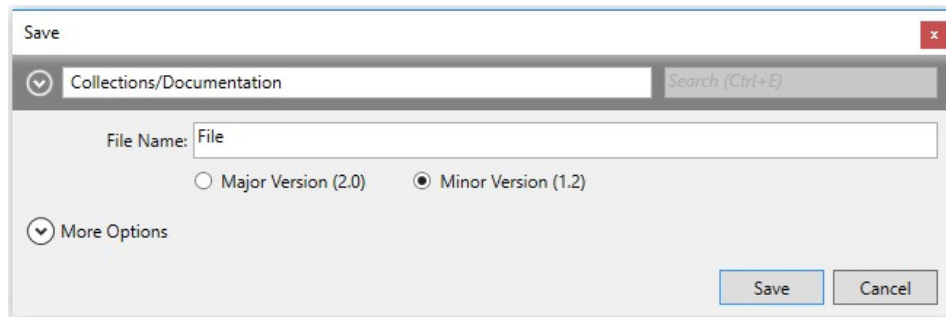
3 Specify whether to check the file in as a **Major Version** or **Minor Version**.

4 In **Workflow**, select which workflow should be applied to the map.

5 In **Status**, select which status should be applied to the map based on your established processes.

6 In **Routed To**, select whether to route the map to a specific team member or to **No One**.

7 In **Revision Comments**, explain what was changed in the map.

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

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

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

10 Click **Save**.

The current version of the map is saved and checked in to the repository.

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

checked out icon. ✔

Discarding changes and check out for a map

Use the Discard Check Out feature to cancel the check out of a map. All authoring changes will be lost.

The map must already be open in Quark XML Author.

To discard check out:

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

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

   Changes made to the map since it was checked out are discarded.

   The map is closed.

   The view in your repository software and the Open dialog show the file without the checked out icon.

   The **Checked Out by** field is cleared.

   The map status changes from checked out to checked in.

Saving a map in Microsoft Word format

You can save the content of the current map to a file in Microsoft Word format.

To save the current content in standard Microsoft Word format:

1 Click **File > Save As**.

2 In the **Save As** dialog box, navigate to the location where you want to save the file.

3 Specify the desired **File name**.

4 In **Save as type**, select **Word Document**.

5 Click **Save**.

   The current content is saved in Microsoft Word format to the specified location and file.

Viewing XML of a map

You can view the XML of the current map in a Web browser.

To view the XML:

   • Click **File > Save & Send > View XML > View XML**.

   The XML is displayed in your Web browser.

E-mailing a map as a Word attachment

You can e-mail a map as a Word document. This feature creates a copy of the current map, and this copy becomes an e-mail attachment.

To e-mail the current map:

1 Click **File > Save & Send > Send Using E-mail > Send as Word Attachment**.

2 Complete the e-mail address and click **Send**.

   The e-mail is sent with the current map as an attachment in the Word format.

E-mailing a map as an XML Author attachment

You can e-mail a map as a Quark XML Author document. This feature creates a copy of the current map, and this copy becomes an e-mail attachment.

To e-mail the current map:

1 Click **File > Save & Send > Send Using E-mail > Send as XML Attachment**.

2 Complete the e-mail address and click **Send**.

The e-mail is sent with the current map as an attachment in the XML format.

Adding a child map

You can add child maps (references to other maps) to a map on the Microsoft Word canvas.

To insert a child map:

1 In the map, position the cursor where you want to insert the child map.

2 Use one of the following methods:

- In the **Styles** tool, select **Child Map-#**.

- Right-click and choose **Child Map-#** from the context menu.

- Right-click and choose **Insert Child map reference from server** from the context menu. This will invoke the **Reference from Server** dialog. You will need to browse to or search for the desired child map and select it.

➡ If a style/element is not allowed at the current cursor position, it is not present in the Styles tool or the Context Menu.

A reference to a map is inserted. The reference displays a pink background to indicate it is incomplete.
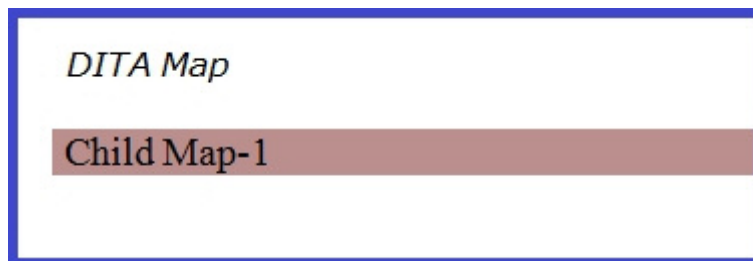
3 Right-click on the incomplete map reference.

4 In the Context Menu, click **Child Map-# Insert Map Reference**.

5 In the **Reference from Server** dialog box, navigate to the repository folder that contains the desired map.

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

- 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. Click the desired search.

The search results are displayed.

➡ You can choose to view the results in either ▦ list view or ▦ snippet view.

7 Locate and select the map.

8 Click **OK**.

The reference to the child map is completed.

DITA Map

Child Map-1

9 Right-click on the child map.

10 In the Context Menu, click **Attributes**.

11 In the **Attributes Panel**, click the **Navigation** tab.

12 Specify a new **Title** for the child map, if
desired.

Attribute Panel - Child Map-1

| Navigation | Miscellaneous | Select Attributes |

Title [   ]   Reference [   ]

OK   Cancel   Apply
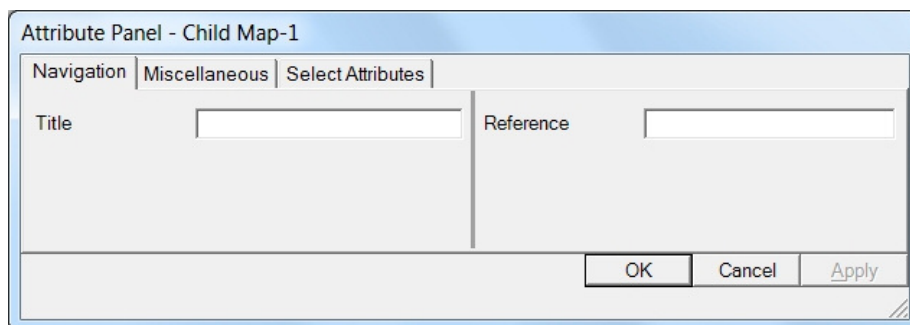
13 Click **OK**.

The child map title is updated on the Microsoft Word canvas.

DITA Map

Troubleshooting

The child map is inserted in the map.

Adding a topic reference

You can insert a topic reference to a map on the Microsoft Word Canvas.

The map must be checked out.

To insert a topic reference:

1. In the map, position the cursor where you want to insert the topic reference.

2. Use one of the following methods:

• In the **Home** ribbon > **Styles** tool, select the desired **Topic Reference**. The
Choose Reference dialog displays. Browse to the topic reference on the
server or from your local machine. Enter a navigation title or click **Insert** to
insert the topic reference.

- To insert a topic reference placeholder, just click the **Insert** button in the **Choose Reference** dialog without selecting a topic. Inserted placeholders can also be checked in to the Platform server. Invoke the context menu and choose **Select >Topic Reference > Create Topic Reference.**

- Right-click and choose **Insert After >Topic Reference** from the context menu. The **Choose Reference** dialog displays. Browse to the topic reference on the server or from your local machine. Enter a navigation title or click **Insert** to insert the topic reference.

- If a style/element is not allowed at the current cursor position, will not be available in the **Styles** tool or the context menu. A topic reference is inserted.

➡ To convert a topic reference type from local to server, right-click on the topic reference and choose **Select >Topic Reference > Create Topic Reference.** Save the topic to the server by browsing to the desired repository location in the **Save** dialog.

When a placeholder is inserted, the topic reference displays a pink background to indicate it is incomplete.

You can assign a topic reference to the placeholder using the following steps:

1. Right-click on the incomplete topic reference.

2. In the context menu, choose **Select > Topic Reference > Assign Topic Reference** from the **Select** menu.

3. In the **Choose Reference** dialog box, navigate to the local drive or the repository folder that contains the desired topic or, in the **Reference from Server** dialog box, use the search feature to locate the desired map.

- To use the Quick Search feature, type a search term in the box in the upper right corner of the Reference from Server dialog box.

- To use an existing search, select the desired search from the list of saved and shared searches in the Searches folder.

The search results are displayed.

➡ You can choose to view the results in either list view or snippet view.

1. Select the topic

2. Click **OK**.

The completed topic reference is inserted into the map.

DITA MAP

Actions

Adding a navigation title to a topic reference

You can add a navigation title to a topic reference in a map. The alternative is to display the topic title as the topic reference title.

To add a navigation title:

1 Right-click on the topic reference.

2 From the context menu, choose **Select** > **Topic Reference#** > **Attributes**.

3 In the **Attributes Panel**, click the **Navigation** tab

4 In the **Navigation** tab, specify the **Navigation Title**.

5 Click **OK**.

The topic reference title is updated on the Microsoft Word canvas.

Displaying the topic title as the title for a topic reference

You can display the topic title as the title for a topic reference on a map. The alternative is to add a navigation title to the topic reference.

To display the topic title:

1 Right-click on the topic reference.

DITA Map

Setting the Sensitivity
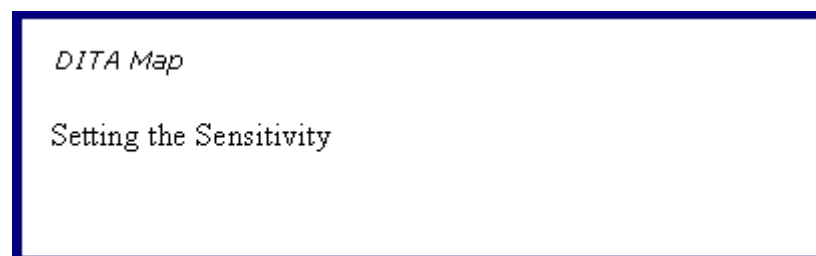
2 In the Context Menu, click **Update Topic Title**.

The topic title is displayed on the Microsoft Word Canvas..

DITA Map

Setting the (ISO) Light Sensitivity
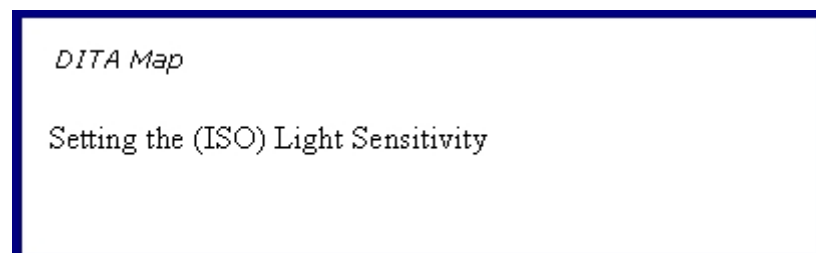
Adding a topic heading

You can add topic headings to a map on the Microsoft Word canvas.

To insert a topic heading:

1 In the map, position the cursor where you want to insert the topic heading.

2 Perform one of the following steps:

- In the **Home** ribbon > **Styles** tool, select **Topic Heading-#**.

- Right-click and choose **Topic Heading-#** from the context menu.

➡ If a style/element is not allowed at the current cursor position, it is not present in the **Styles** tool or the Context Menu.

3 Right-click on the topic heading.

4 From the context menu, choose **Attributes.**

5 In the **Attributes Panel** dialog, click the **Navigation** tab.
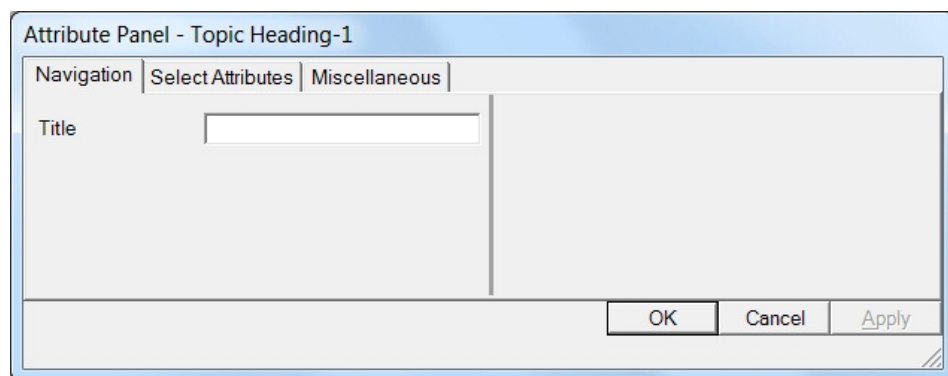
6 Specify a new **Title** for the topic heading, if desired.

7 Click **OK**.

The topic heading is inserted in the map.

The topic heading title is displayed on the Microsoft Word canvas.

To add metadata and attribute values, see "Adding map element attributes".

Adding a topic reference to a topic heading

You can add topic references to a topic heading on the Microsoft Word canvas.

The map must be checked out.

The map must have been added to the repository.

To add a topic reference to a topic heading:

1 In the map, position the cursor where you want to insert the topic reference.

2 Perform one of the following steps:

- In the **Home** ribbon > **Styles** tool, select **Topic Reference-#**.

- Right-click and choose **Topic Reference-#** from the context menu.

- Right-click and choose **Insert topic reference from server** from the context menu. This will invoke the **Reference from Server** dialog. You will need to browse to or search for the desired topic and select it.

➡ If a style/element is not allowed at the current cursor position, it is not present in the **Styles** tool or the Context Menu.

A topic reference is inserted. The topic reference displays a pink background to indicate it is incomplete.

3 Right-click on the incomplete topic reference.

4 From the Context Menu, choose **Topic Reference-# Insert Topic Reference**.

5 In the **Reference from Server** dialog box, navigate to the repository folder that contains the desired topic.

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

- 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. Click the desired search.

The search results are displayed.

➡ You can choose to view the results in either ▤ list view or ▥ snippet view.

7 Click on the topic.

8 Click **Open**.

The completed topic reference is added to the topic heading.
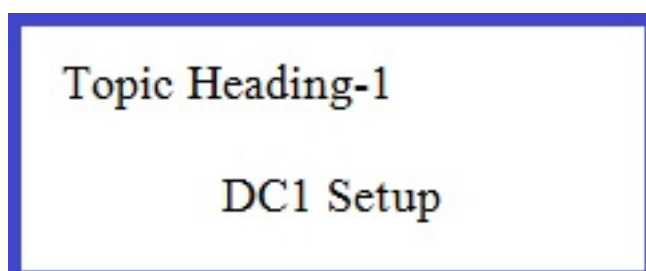
Adding a topic group

You can add topic groups to a map on the Microsoft Word canvas.

To add a topic group to a map:

To add metadata and attribute values, use the Adding Map Element Attributes.

1 In the map, position the cursor where you want to insert the topic group.

2   Right-click and choose **Topic Group** from the context menu.

The topic group is inserted in the map.

To add metadata and attribute values, see "Adding map element attributes".

Adding a topic reference to a topic group

You can add topic references to a topic group on the Microsoft Word canvas.

The map must be checked out.

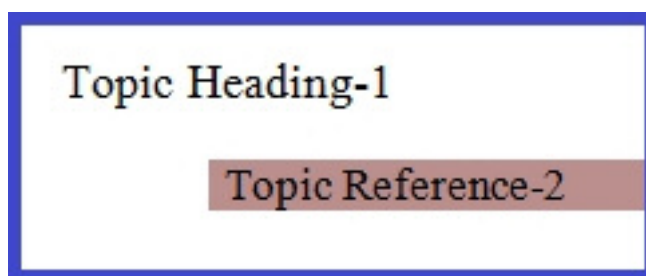The map must have been added to the repository.

To add a topic reference to a topic group:

1 In the map, position the cursor under the topic group where you want to insert the topic reference.

2 Perform one of the following steps:

- In the **Home** ribbon > **Styles** tool, select **Topic Reference-#**.

- Right-click and choose **Topic Reference-#** from the context menu.

- Right-click and choose **Insert topic reference from server** from the context menu. This will invoke the **Reference from Server** dialog. You will need to browse to or search for the desired topic and select it.

➡ If a style/element is not allowed at the current cursor position, it is not present in the **Styles** tool or the Context Menu.

A topic reference is inserted. The topic reference displays a pink background to indicate it is incomplete.

3   Right-click on the incomplete topic reference.

4   From the context menu, choose **Insert Topic Reference**.

5   In the **Reference from Server** dialog box, navigate to the repository folder that contains the desired topic.

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

   • 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. Click the desired search.

   The search results are displayed.

➡ You can choose to view the results in either ▤ list view or ▦ snippet view.

7   Click on the topic.

8   Click **Open**.

   The completed topic reference is added to the topic group.

About browse sequences

In HTML-based Help topics, you can use browse sequences to create the Previous and Next links that allow the reader to navigate sequentially in a publication or book.

Browse sequences do not apply to printed publication formats. A browse sequence is the part of a map that defines the map's topic references. You cannot change the attributes of a browse sequence.
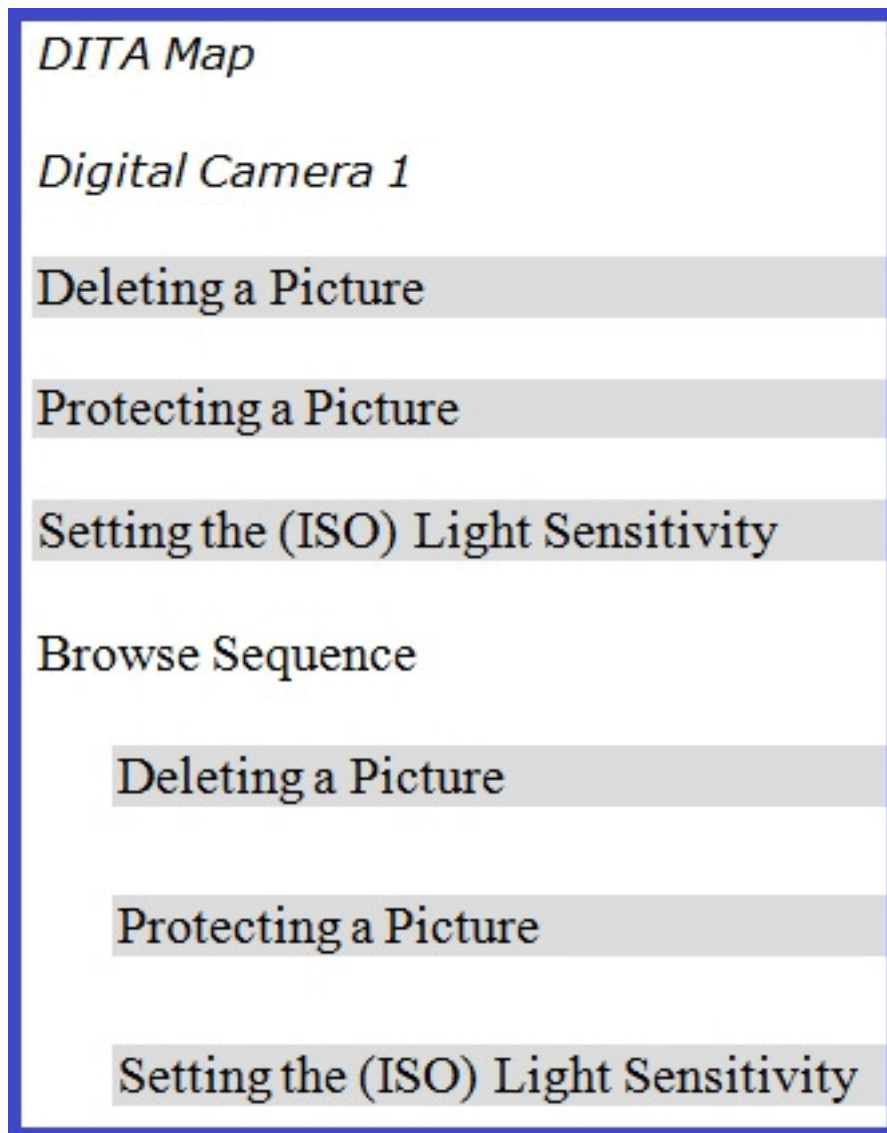
Adding a browse sequence group to a map

You can add browse sequences to a map on the Microsoft Word canvas.

The map must have been added to the repository.

The map must be checked out.

Browse sequence groups and related topics groups are not part of the published table of contents. Therefore, Quark recommends organizing all browse sequence groups and related topics groups at the bottom of the map, so that they are visually separated from the topic references that are part of the table of contents.

To add a browse sequence group to a map:

1 In the map, position the cursor where you want to insert the browse sequence.

2 Perform one of the following steps:

- In the **Home** ribbon > **Styles** tool, select **Browse Sequence**.

- Right-click and choose **Browse Sequence** from the conext menu.

➡ If a style/element is not allowed at the current cursor position, it is not present in the **Styles** tool or the Context Menu.

The new browse sequence is added to the map.
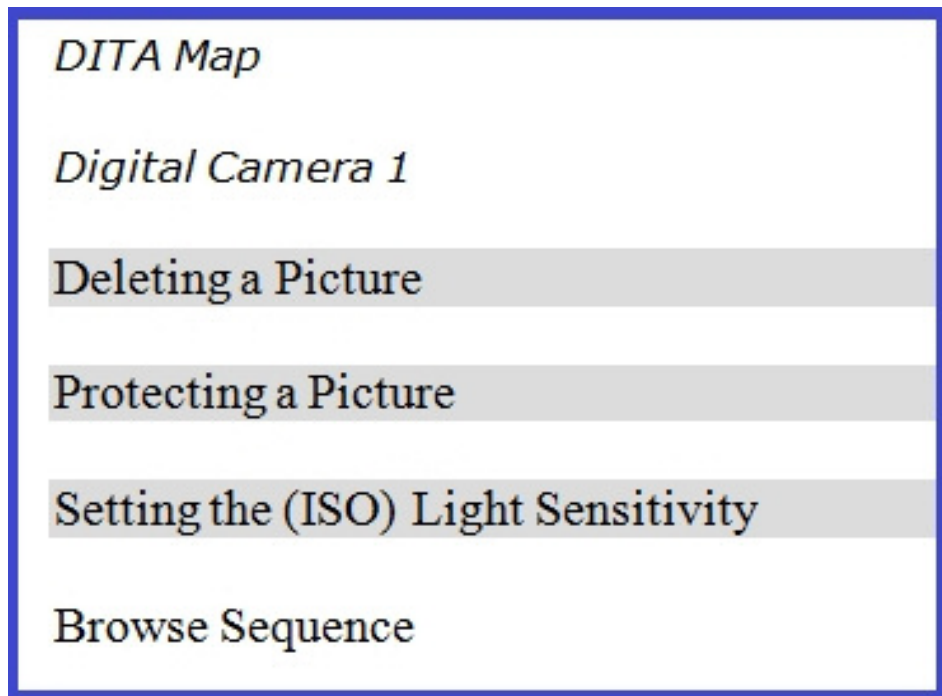
Adding a topic reference to a browse sequence group

You can add topic references to a browse sequence group on the Microsoft Word canvas.

The map must be checked out.

To add a topic reference to a browse sequence group:

1 Right-click on the desired browse sequence group.
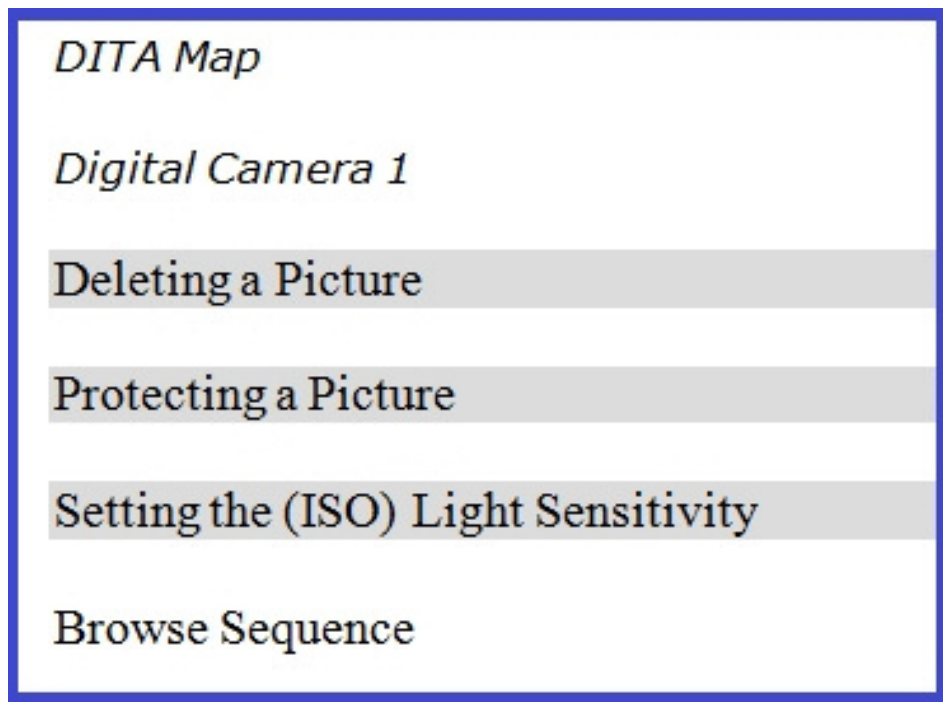
2   Choose **Edit Browse Sequence** from the context menu.

The **Browse Sequence** dialog box is displayed.

3   In the left column of the **Browse Sequence** dialog box, click the topic reference that you want to add to the browse sequence group.

The right column displays the current members of the group.
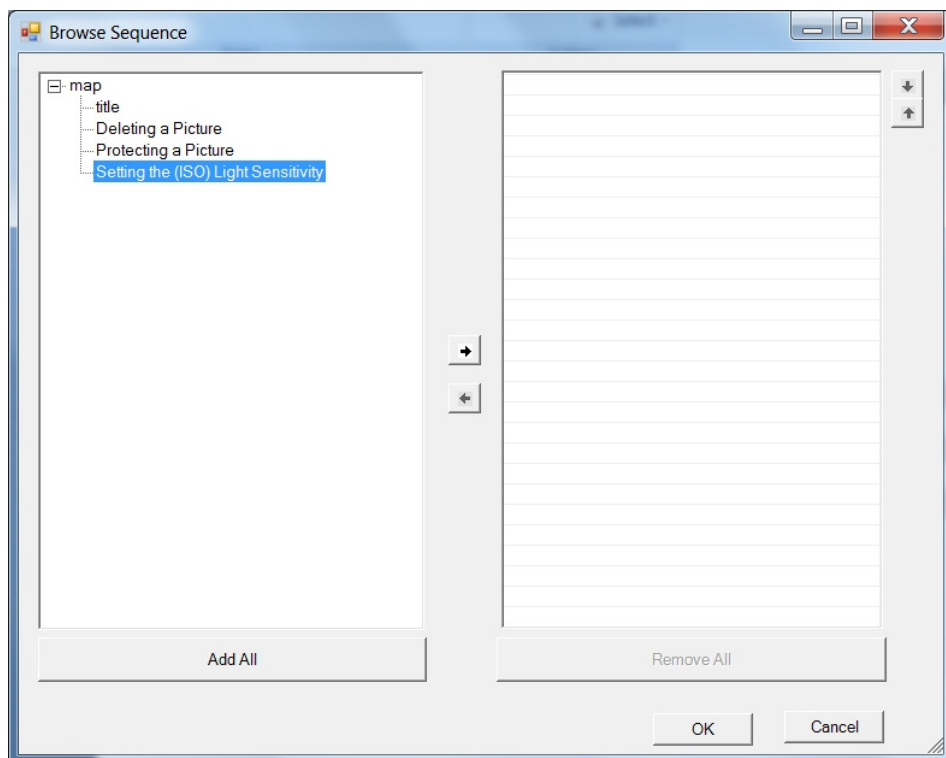
4   Click the right arrow button.

5   To change the position of the topic reference within the browse sequence group, use the up or down arrow buttons.

6   Click **OK**.

The topic reference is added to the browse sequence group.

About related topics

In HTML-based Help topics, *related topics* are "See Also" links that the reader can use to jump to other topics that are related to the current topic. These links are grouped by type (Concept, Task and Reference). Glossary Entry links are grouped with Concept links.

Related topics do not apply to printed publication formats. A related topics group is part of a map that contains the map's topic references. You cannot change the attributes of a related topic.
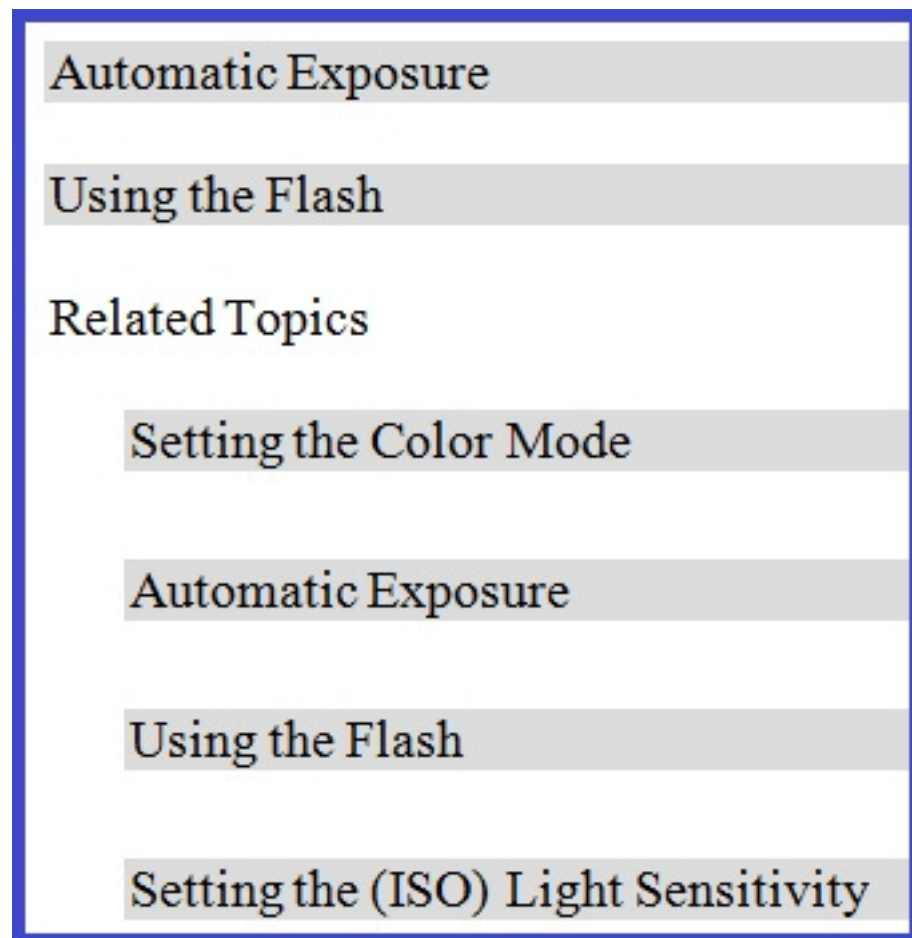
Adding a related topics group to a map

You can add related topics groups to a map on the Microsoft Word canvas.

The associated map must be checked out.

The map must have been added to the repository.

Browse sequence groups and related topics groups are not part of the published table of contents. Therefore, Quark recommends organizing all browse sequence groups and related topics groups at the bottom of the map, so that they are visually separated from the topic references that are part of the table of contents.

To add a related topics group to a map:

1   In the map, position the cursor where you want to insert the browse sequence.

2 Perform one of the following steps:

- In the **Home** ribbon > **Styles** tool, select **Related Topics**.

- Right-click and choose **Related Topics** from the context menu.

➡ If a style/element is not allowed at the current cursor position, it is not present in the **Styles** tool or the Context Menu.

The new related topics group is added to the map.

Adding a topic reference to a related topics group

You can add topic references to a related topics group on the Microsoft Word canvas.

The associated map must be checked out.

The map must have been added to the repository.

To add a topic reference to a related topics group:

1 Right-click on the desired related topics group.
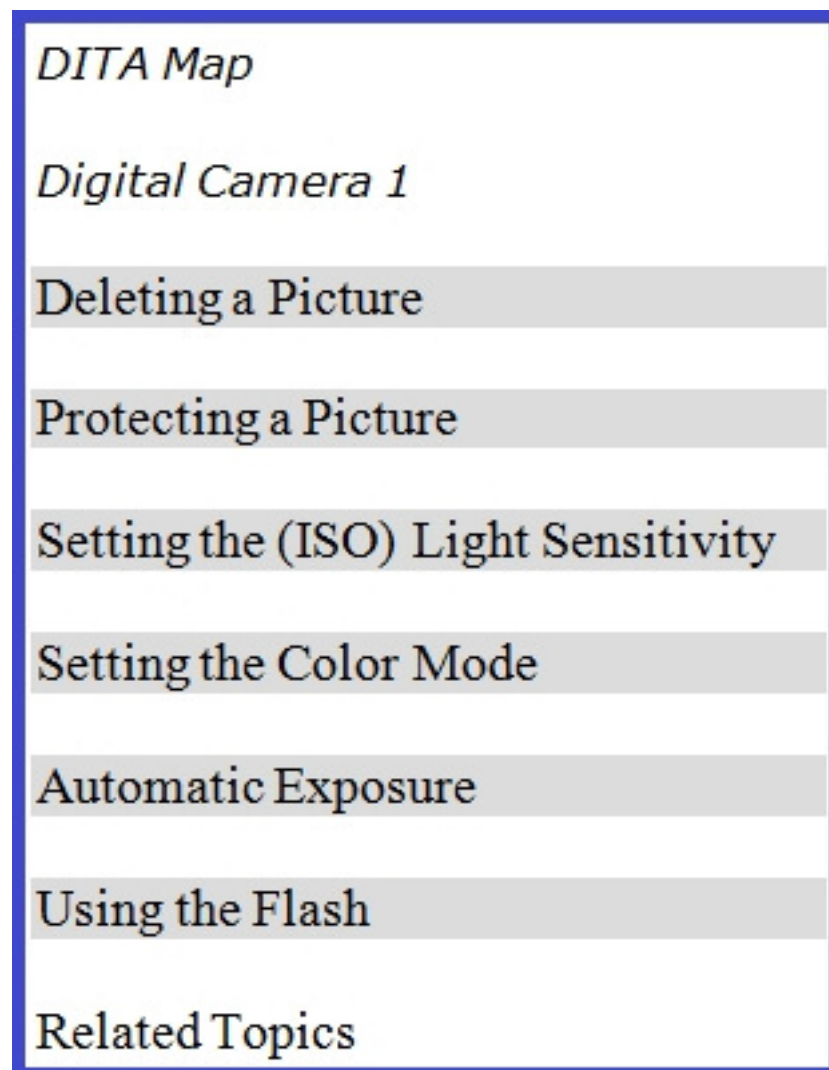
2 Choose **Edit Related Topics** from the context menu.

The **Related Topics** dialog box is displayed.

3 In the left column of the **Related Topics** dialog box, click the topic reference that you want to add to the related topics group.

The right column displays the current members of the group.
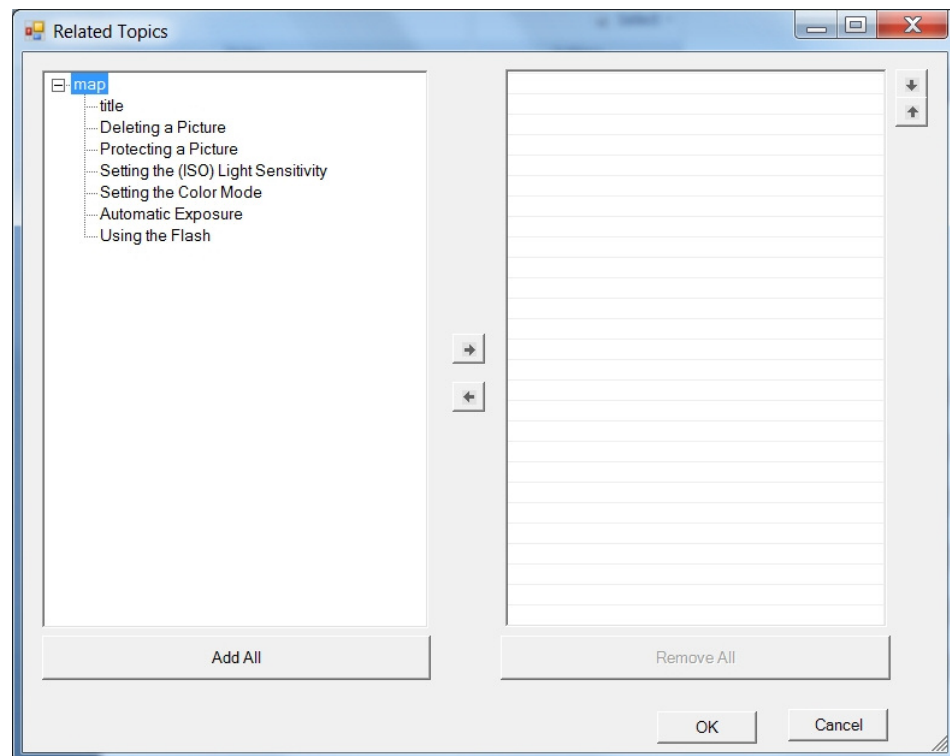
4 Click the right arrow button.

5 To change the position of the topic reference within the related topics group, use the up or down arrow buttons.

6 Click **OK**.

The topic reference is added to the related topics group.

Index terms

You can add, edit, and delete index terms for a map using the **Document** tab of the **Properties Pane**.

Index terms for a map element are added, edited and deleted using the applicable tab of the **Properties Pane**.

Adding index terms to a map

To add an index term:

1 Click **Home** ribbon > **Properties** or **View** ribbon > **Properties**.

2 Click the **Document** tab.

3 In the **Properties Pane**, expand the **Metadata** panel.

4 In the **Metadata** panel, click **Add New Index Terms**.

The **Add New Index Terms** dialog is displayed.

5   In **Index Term**, specify the word or phrase that you want to add as an index term. To create a multi-level index, separate levels with a forward or backward slash, i.e. "colors\blue".

6   Click **OK**.

The index terms are displayed in the **Index Terms** group of the **Metadata** panel.

The index terms are added to the map.

Sorting index terms for a map

You may specify how an index term (primary or secondary) is sorted in the published index. Sorting criteria is specified for an index term in the **Properties Pane**. Sorting criteria, see, and see also index terms may all be assigned to an index term at the same time, in any order and in any combination.

This feature applies to map level index terms.

To sort an index term:

1   Click **Home** ribbon > **Properties** or **View** ribbon > **Properties**.

2   Click the **Document** tab.

3   In the **Properties Pane**, expand the **Metadata** panel.

4 In the **Metadata** panel, click the desired index term.

The **Edit New Index Terms** dialog is displayed.

5 At the end of the index term (primary or secondary), enter a caret (^) and then the sorting criteria. For example, to sort *dark green* as *green*, enter *dark green^green*. In combination with a see also index, enter *dark green^green+fir green*.

The sorting criteria is applied to the selected index term.

Adding see index terms to a map

In the published index, an index term may contain a "See" index term that redirects the reader to another index term. You can add "See" index terms to an index term in the Properties Pane. Sorting criteria, "See" index terms, and "See Also" index terms can all be assigned to an index term at the same time, in any order and in any combination.

This feature applies to map-level index terms.

To add a see index term:

1 Click **Home** ribbon > **Properties** or **View** ribbon > **Properties**.

2 Click the **Document** tab.

3 In the **Properties Pane**, expand the **Metadata** panel.

4 In the **Metadata** panel, click the desired index term.

The **Edit Index Terms** dialog is displayed.

5 At the end of the index term (primary or secondary), enter a greater than character (>) and then the "See" index. For example, to add the "See" index term *white*

balance to the index term *tungsten*, enter *tungsten>white balance*. For example, to combine sorting criteria and a see index term, enter *dark green^green>fir green*.

The "See" index term is added to the selected index term.

Adding see also index terms to a map

In the published index, an index term may contain a "See" index term that redirects the reader to another index term. You can add "See" index terms to an index term in the Properties Pane. Sorting criteria, "See" index terms, and "See Also" index terms can all be assigned to an index term at the same time, in any order and in any combination.

This feature applies to map-level index terms.

To add an "See Also" index term:

1 Click **Home** ribbon > **Properties** or **View** ribbon > **Properties**.

2 Click the **Document** tab.

3 In the **Properties Pane**, expand the **Metadata** panel.

4 In the **Metadata** panel, click the desired index term.

The **Edit Index Terms** dialog is displayed.

5 At the end of the index term (primary or secondary), enter a plus sign (+) and then the "See Also" index. For example, to add the "See Also" index term *white balance* to

the index term *color*, enter *color+white balance*. To combine sorting criteria and a see also index term, enter *dark green^green+fir green*.

The "See Also" index term is added to the selected index term.

Working with topics

The working with topics section provides details on all topic related features and capabilities found in Quark XML Author.

Basic topic features (Platform)

Quark XML Author for Quark Publishing Platform provides basic file operations, including New, Open (Check Out), and Save (Check In).

Creating a new topic

You can create new topics directly in Quark XML Author.

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

To create a new topic:

1   Click **File > New XMLAuthor**.

2   In the **XML Author** menu, choose one of the following topic types:.

The topicis created in Quark XML Author and is ready for authoring.

- New Concept

- New Task

- New Reference

- New Topic
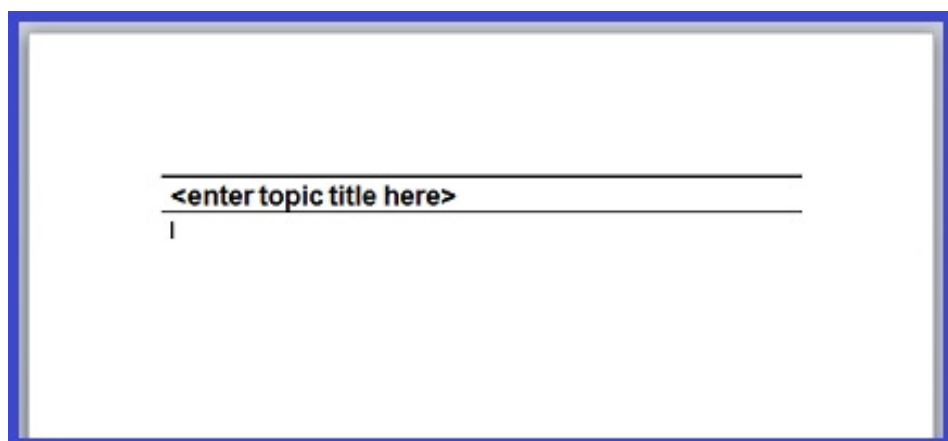
3   When you have finished authoring, save the topic .

Saving in Microsoft Word format

The content of the current topic may be saved to a file in Microsoft Word format.

To save the current content in standard Microsoft Word format:

1 Click **File > Save As**.

2 In the **Save As** dialog box, navigate to the location where you want to save the file.

3 Specify the desired **File name**.

4 In **Save as type**, choose **Word Document**.

5 Click **Save**.

The current content is saved in Microsoft Word format to the specified location and file.

Viewing XML

You can view the XML of the current topic in a Web browser.

To view the XML, click **File > Save & Send > View XML > View XML**.

The XML is displayed in your Web browser.

E-mailing as an XML Author attachment

A topic can be emailed as a Quark XML Author document. This feature creates a copy of the current topic. This copy becomes the attachment of the e-mail.

To e-mail the current topic:

1 Click **File > Save & Send > Send Using E-Mail > Send as XML Attachment**.

2 Complete the e-mail address and click **Send**.

The e-mail is sent with the current topic as an attachment in the Quark XML Author format.

E-mailing as a Word attachment

A topic can be emailed as a Word document. This feature creates a copy of the current topic. This copy becomes the attachment of the e-mail.

To e-mail the current topic:

1 Click **File > Save & Send > Send Using E-Mail > Send as Word Attachment**.

2 Complete the e-mail address and click **Send**.

The e-mail is sent with the current topic as an attachment in the Word format.

Elements

Quark XML Author is a structured authoring tool that lets you easily insert, copy, move and delete content elements (paragraphs, steps, etc.) to create a valid topic.

Inserting elements

Elements are inserted on the Word canvas.

To insert an element:

1   In the topic(body text, lists, tables, etc.), position the cursor where you want to insert the new element.

2   Use one of the following methods:

- In the **Home** ribbon > **Styles** group, choose the style that represents the element you want to insert.

➡ This is not available for certain elements, such as Pictures, Tables and Equations. For those elements, use one of the other two methods.

- In the **Insert** ribbon, choose the Style that represents the element that you want to insert. (**Table**, **Picture** etc.).

- Right-click and in the context menu, choose **Insert Before** or **Insert After** and then choose the Style that represents the element you want to insert.

➡ If a style/element is not allowed at the current cursor position it will not be present in the **Styles** goup or the context menu. Additionally, the associated menu command and toolbar button will not be available.

For more information on where elements may be inserted, see "About inserting elements and structured authoring".

The element is inserted. The element will be inserted before or after the current element depending upon the option selected by user. When the user chooses an option from the **Home** ribbon-> **Styles** group, or from the **Insert** ribbon, the element will be inserted after the current element by default.

The element is ready for content to be added. For example, text may be added to text-based elements or images may be inserted in image-based elements.

The element is also ready for child elements to be inserted, if allowed.

➡ Some elements have child elements that, because they are required, are automatically inserted.

About inserting elements and structured authoring

When you are authoring an XML topic(body text, lists, tables, etc.) you are authoring a structured topic(body text, lists, tables, etc.).

Technically, this means that your topic(body text, lists, tables, etc.) must follow the structure rules specified by the XML schema for the type of topic(body text, lists, tables, etc.) you are authoring.

In the following example, let's assume we are using a typical authoring schema. We have a simple topic that contains a title, a bulleted list, and a section with two paragraphs. Quark XML Author displays these content elements on the Word canvas as follows:
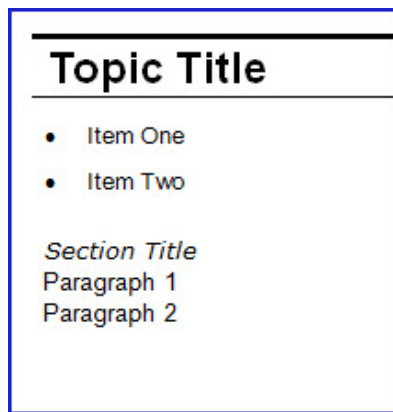
Internally the structure of the topic has the following hierarchy:
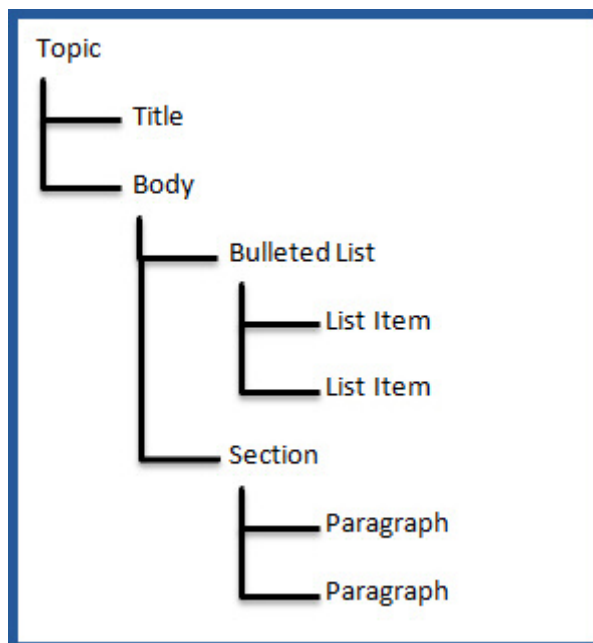
Immediately below paragraph two, the author is allowed to insert a content element at three levels:

- as a child of paragraph two

- as a sibling to paragraph two

- as a child of Body

The following figure highlights in green the three possible locations where a numbered list can be inserted into the topic structure.
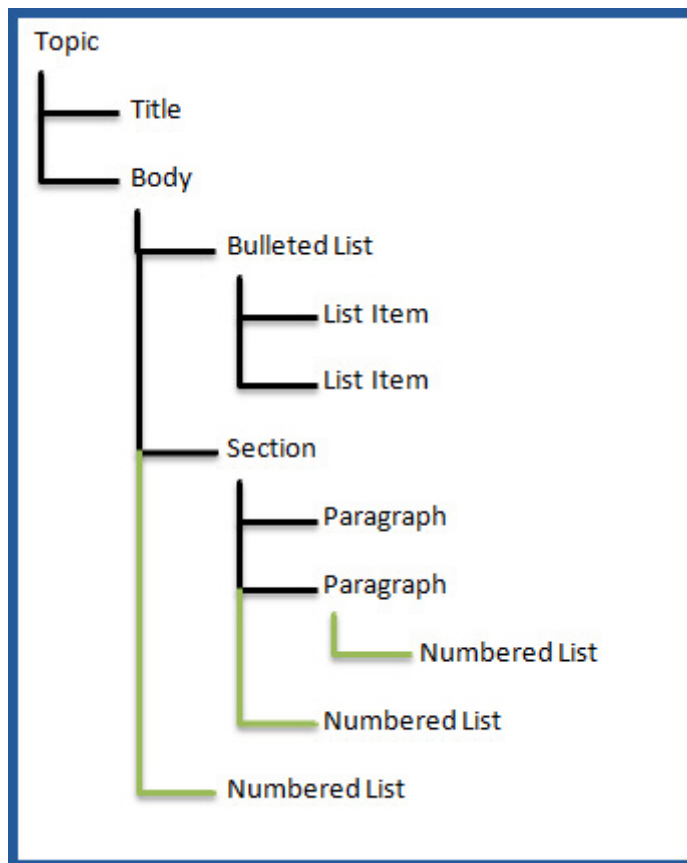
The more deeply nested the content is in a topic, the more levels there are at which you are allowed to insert new content. All of these levels must be present on the context menu that displays the list of insertable elements. This list is also presented in the **Styles** group, but because the context menu can have submenus that represent hierarchy, the context menu user interface can be more intuitive.

Using the context menu

When you right-click, then the first level of the Context Menu displays the elements that may be inserted as children to the element that is above the cursor. If this previous element is a list, then a sibling element of that list type is also offered on the first level of the Context Menu. Elements that may be inserted at a higher level in the document structure are offered in submenus displayed at the bottom of the Context Menu. For example, in our sample use case, the Context Menu for inserting elements below Paragraph two uses a separate submenu to indicate that content elements may be inserted as children of the Body.

The following figure of the Context Menu highlights in green the three possible commands for inserting a numbered list at the cursor.

Image (Child of Paragraph)

Bulleted List (Child of Paragraph)

Numbered List (Child of Paragraph)

Simple List (Child of Paragraph)

Paragraph

Long Quote

Note

Definition List

Parameter List

Bulleted List (Child of Section)

Numbered List (Child of Section)

Simple List (Child of Section)

Figure

Syntax Diagram

Image (Child of Section)

Table

Topic Body Elements ▶

Topic Elements ▶
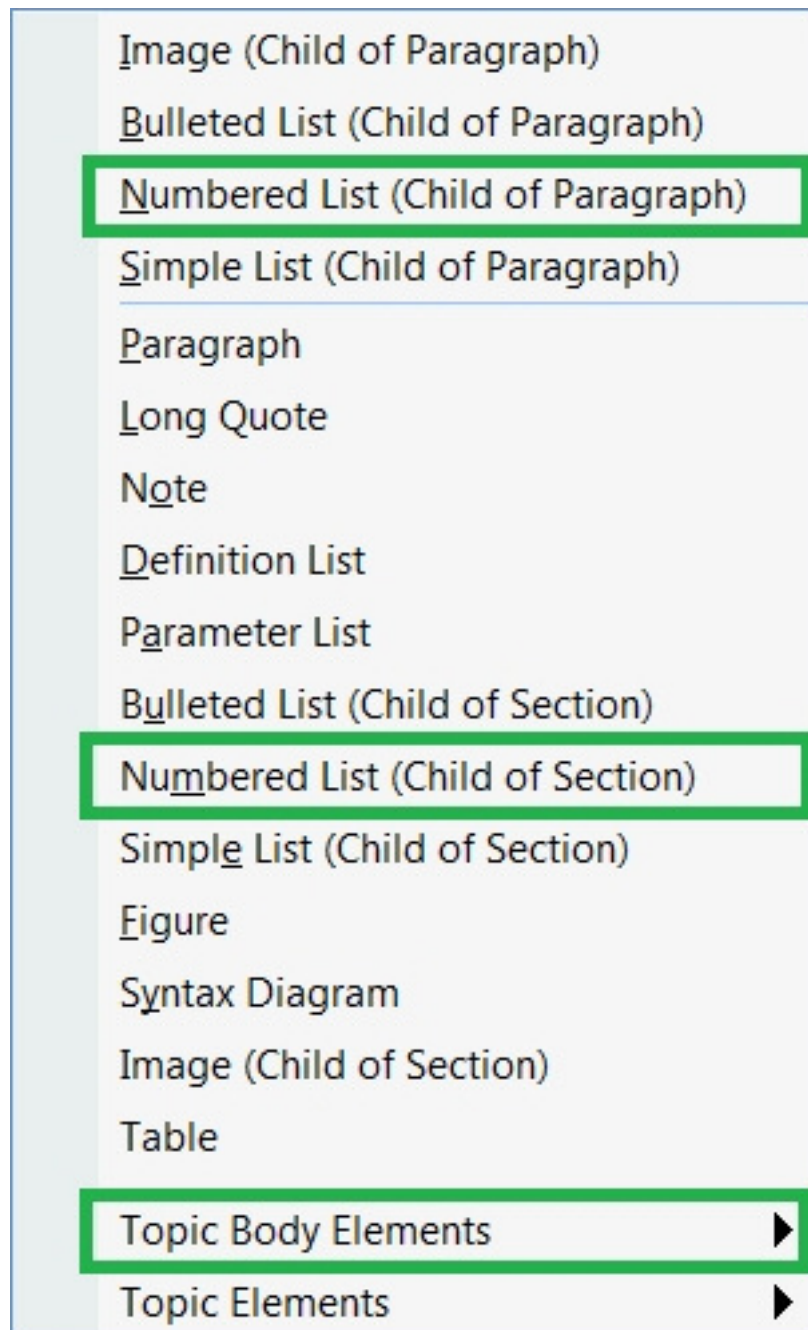
You can also insert elements by right-clicking on a given element and inserting elements after that element. The list of insertable elements is presented in the Context Menu's **Insert After** submenu.

The following figure of the Context Menu highlights in green the three possible commands for inserting a numbered list after the Paragraph.
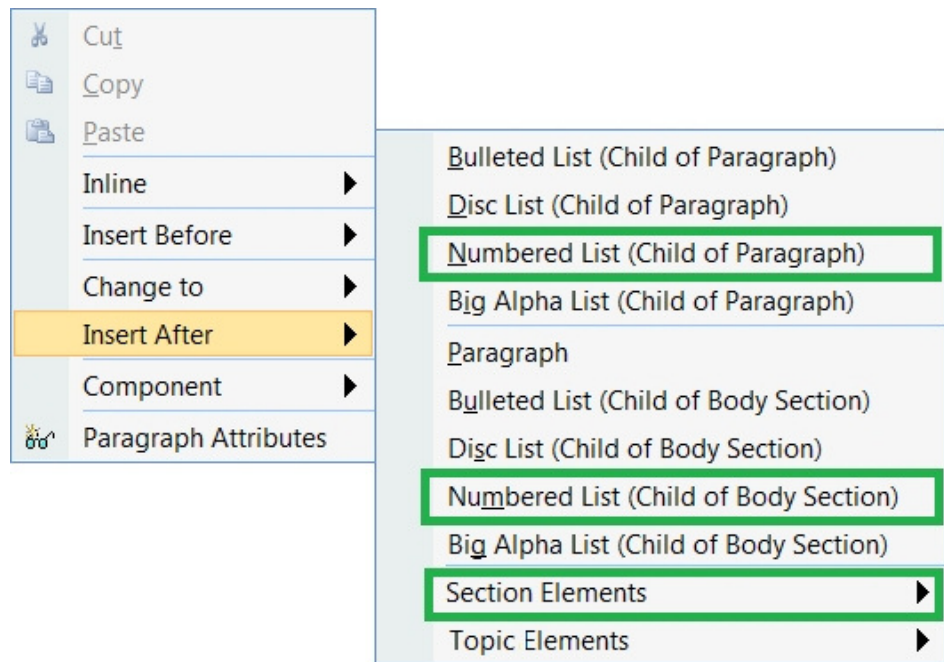
Quark XML Author would render the numbered list on the Word canvas similarly in each case.
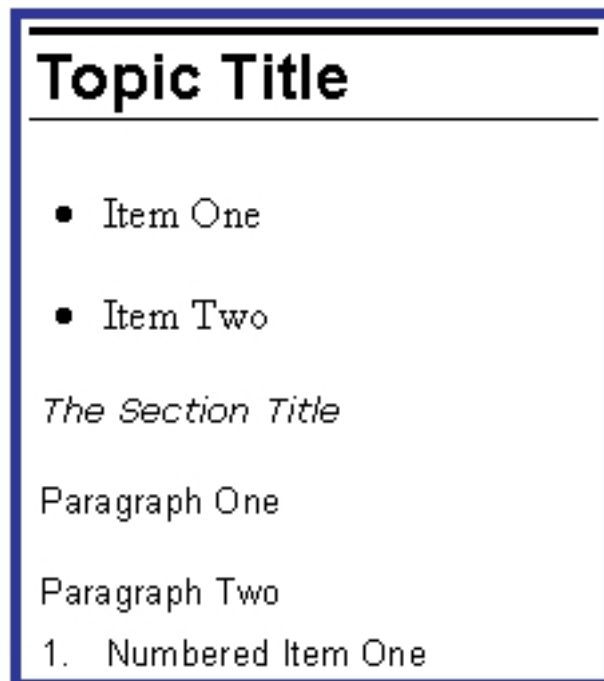
You can also insert elements by right-clicking on a given element and inserting elements before that element. The list of insertable elements is presented in the Context Menu's **Insert Before** submenu. This is the same as inserting elements at the cursor above Paragraph two.

The following figure of the Context Menu highlights in green the three possible commands for inserting a numbered list before the Paragraph.
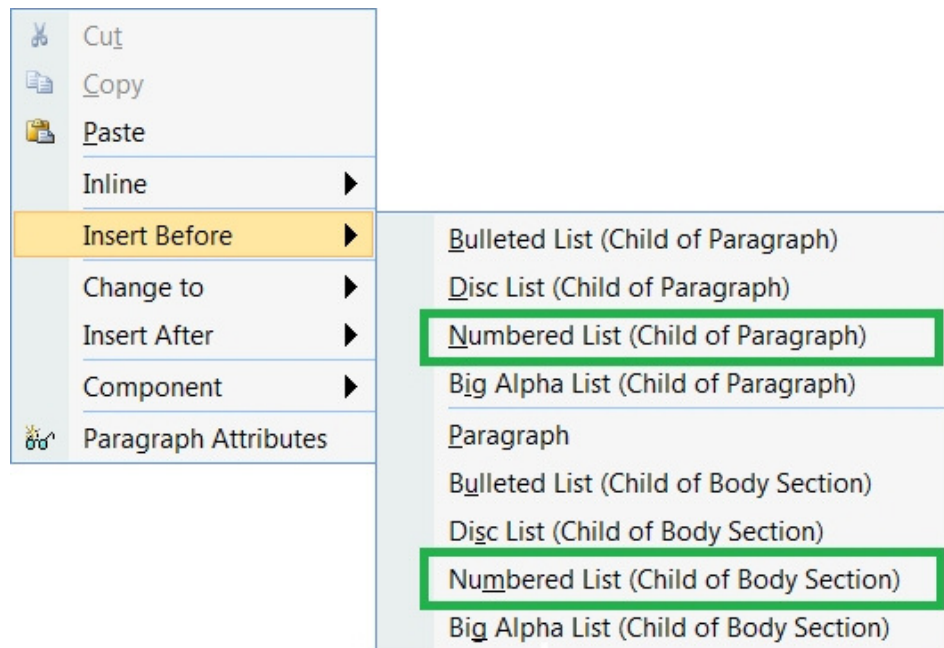
Copying elements

An entire element, including its attributes and any child elements, may be copied to a new location in a topic or to a different topic.

The element and any of its child elements may be content references.

➡ This feature applies to elements while the standard cut, copy, paste features in Word apply to text.

To copy an element:

1 Right-click on the element that you want to copy to the clipboard.

2 In the context menu, choose **Select**, the desired element, and then **Copy**.
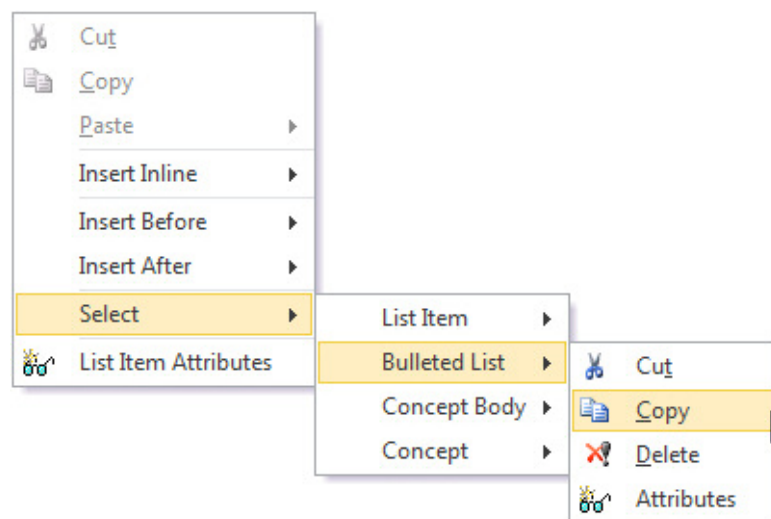
The element is copied to the clipboard.

3 In the topic, position the cursor where you want to paste the element that is on the clipboard and right-click.

4 In the context menu, choose the appropriate **Paste** {element name}.

➡ The context menu will show all the valid available options under the **Paste** option, allowing you to paste the element or the reference. The options shown under the **Paste** option will depend on what you have copied as well as the position of the cursor where you are attempting to paste the element(s). When the element may be pasted at additional levels in the document structure, these are displayed on the context menu. When pasting, if the cursor is at the beginning of a element, the copied element will be inserted above the current element. If the cursor is in the middle of element, this element will split and the copied element will be pasted in the middle of the element. If the cursor is at the end of an element, the copied element will be inserted after the element.
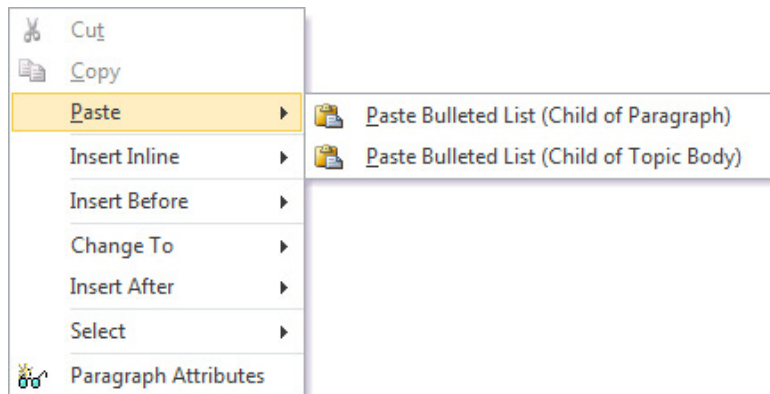
For more information on where elements may be pasted, see "About inserting elements and structured authoring"

The element, its attributes, and any child elements are pasted at the location you selected.

Moving elements

An entire element, including its attributes and any child elements, may be moved to a new location in a topic or to a different topic.

The element and any of its child elements may be content references.

➡ This feature applies to elements while the standard cut, copy, paste features in Word apply to text.

To move an element:

1 Right-click on the element that you want to move.

2 In the context menu, choose **Select**, the desired element, and then **Cut**.

If the element you cut has children, a warning is presented stating that. This warning may be ignored.
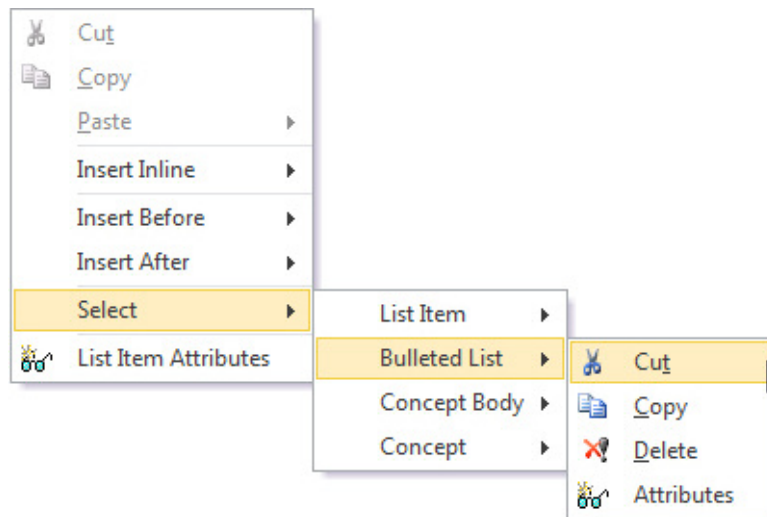
The element is cut to the clipboard.

3 In the topic, position the cursor where you want to paste the element that is on the clipboard.

4 Right-click and from the context menu, choose the appropriate **Paste** {element name}.

➡ When the element may be pasted at additional levels in the document structure, these are displayed on the Context Menu.
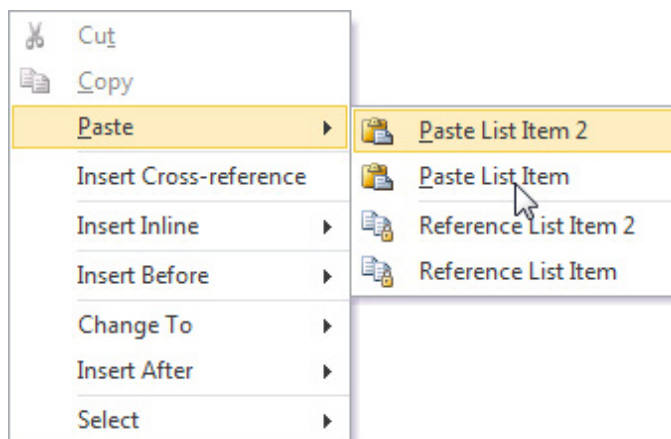
For more information on where elements may be pasted, see "About inserting elements and structured authoring".

The element, its attributes, and any child elements are pasted at the cursor position.

Deleting elements

An entire element, including its attributes, and any child elements, may be deleted using a single action.

To delete an element

1 Right-click on the element that you want to delete.

2 In the context menu, choose **Select**, the desired element, and then **Delete**.

3 If the current element has child elements that will also be deleted, the system will prompt you with a list of those child elements and ask you to confirm the delete action.

4 Click **Yes** if you are sure this is the element you want to delete.

The element, its attributes, and any child elements are deleted.

Cross-references to elements that have been deleted will be highlighted in Red.

1. Numbered list item 4
2. Numbered list item 2
3. Numbered list item 3

About deleting elements and structured authoring

Deleting content in a structured authoring tool can be significantly different than in Microsoft Word. Deleting simple text is the same in both. But when working with elements, specific behaviors and rules for delete are needed in order to ensure the integrity of an XML document and its structure.

Most content in a standard Word document is not required and therefore may be deleted. However, most XML schemas have some required content. A schema may define a parent element with a required child element that may not be deleted. Some content elements have required elements regardless of the schema. For example, a bulleted list requires at least one item and a table requires at least one row or column or cell. Therefore, the Select, Cut, Remove and Delete features are unavailable in these scenarios or the feature may delete a parent (or ancestor) element.

This applies to the delete feature in Quark XML Author that is executed through the **Select**, **Cut**, and **Delete** commands. And, this applies whether the commands are executed via the Ribbon, Context Menu or shortcut keys.

About backspace and delete key features

The behavior of the **Backspace** and **Delete** keys depends on what is currently selected and the location of the cursor. The behavior is also controlled by structured authoring rules.

See "About deleting elements and structured authoring".

The following sections applies to content both outside and inside of tables.

Selection exists

If the selection contains only text, the text is deleted.

If the selection contains only optional elements, the optional elements are deleted.

Outside of tables, if the selection contains any required elements, the optional elements are deleted and text in the required elements is deleted.

Inside of tables, if the selection contains any required elements, the optional elements are deleted and text in the required elements is deleted. This applies to selections that span any table element such as cells, rows, sections, etc.

If the selection contains all or part of a table and no adjacent elements or empty elements, then the content is deleted. The table structure is unchanged.

If the selection contains an entire table, one or more adjacent empty elements, and no adjacent elements, then the table content and structure are deleted.

If the selection contains part of a table and one or more adjacent elements or empty elements, then no change occurs.

No selection exists

In these use cases, the cursor is within an element, but nothing is selected.

Pressing the **Backspace** key will delete text until no text remains to the left of the cursor.

In an optional element, pressing the **Backspace** key at the leftmost cursor position merges the text with previous element and deletes the current element. This also applies when the current selection is a list item.

In a required element, pressing the **Backspace** key at the leftmost cursor position does not cause a change.

Pressing the **Delete** key deletes text until no text remains to the right of the cursor. Pressing the **Delete** key at the rightmost cursor position does not cause a change.

Cutting, copying, and pasting multiple elements - overview

The Cut, Copy, Paste feature works with selections that include multiple elements and multiple content types such as text, images and tables. This includes all metadata and emphasis within the selection as well as child elements.

The best practice for this feature is to start the selection from the start of the first desired element and extend the selection to the end of last desired element. In the Context Menu, the paste command only shows the name of the first element type in the selection. For example, a selection of paragraphs and then a table displays the command "Paste Body Text".

Selections may include only a portion of the text of an element, but doing so may have unexpected results. For more information, see "Cutting, copying, and pasting multiple elements - details".

Cutting, copying, and pasting multiple elements - details

Content selections within Quark XML Author that include multiple elements and multiple content types can be complex. The following provides details about the scenarios and use cases that the Cut, Copy, Paste feature supports.

- For required elements, elements outside of the selection may be included in order to maintain valid content. For example, a section requires a title. If you select only the section title, copy and then paste, the parent section of the title and all content within that section will also be copied and pasted. Or for example, if you only select a row of a table, copy and then paste, the parent table of the row will be copied and pasted.

- For child elements, such as list items, the feature behavior depends whether or not all children are selected. For example, if all list items are selected then the parent list and its metadata are automatically included. If a subset of the list items is selected, then the parent list element is not included and the selection may only be pasted into an existing list.

- A selected element's child elements are automatically included.

- A selection may include only a portion of the text of an element. For required elements, this can negate the inclusion of the parent element. For example, if you select only a portion of a section title, the parent section of the title will not be included in the selection.

- A selection may include only a portion of the cells in a table row.

Working with text

Entering text

To enter text in an element that allows for narrative text, simply place the cursor in the element and type the desired text.
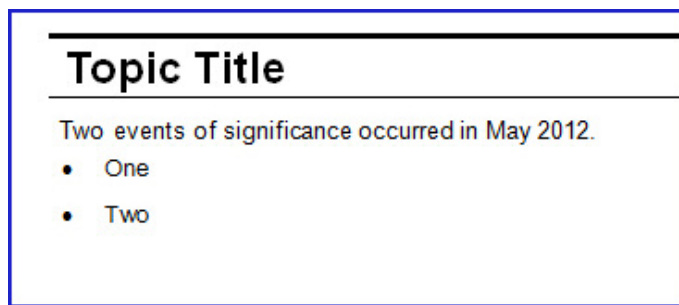
Cutting, copying and pasting text

The Cut, Copy, and Paste text features work similarly to standard Microsoft Word versions of these features.

These features are accessible using the Microsoft Word – **Home** ribbon buttons or shortcut keys. Or you can right-click on the selected text and these commands are displayed on the first level of the Context Menu.

If the selected text contains emphasis, the emphasis is preserved when the text is moved or is duplicated if the text is copied.

The text of a single element may be cut, but the text of multiple elements may not.

The text of multiple elements may not be copied and pasted into multiple text based elements. For example, the text of two paragraphs is copied. It may not be pasted into two bullet list items.

Outside of tables, the text of a multiple elements may be copied and pasted into another text based element. The text of the first copied element is pasted, then siblings of the destination element are created as needed to receive the remaining text. For example, the text of three paragraphs is copied and then pasted into a bulleted list item. Two sibling bulleted items are created. The first new item received the second paragraph. The second new item receives the third paragraph.

Entering / pasting text into a selection

The behavior of the typing and pasting text depends on what is currently selected.

If the selection only includes text within a single element, that selection is replaced with the character typed or the text that is pasted.

If the selection includes more than one element and a printable character is typed or text is pasted, no change occurs.

Inside of a table, the text of multiple elements may be copied and pasted into multiple text based elements. The best practice is to select and copy text for a given number of elements. For the destination that receives the text, select the same number of elements and paste the text. For example, copy the text of two cells and

paste it into two cells. Or in a more detailed example, right-click to the left of a row, select **Copy**, right-click to the left of a second row, select **Paste**. The text of the second row is replaced with the text of the first row.

Using placeholders

Placeholders are put in specific locations in document templates for the purpose of being replaced by the author with narrative text or titles.

To replace a placeholder:

1 Click the placeholder or move the cursor into the placeholder.

The entire placeholder text is selected.

2 Type new text.

The placeholder text is replaced with the new text. The new text is not emphasized.

About placeholders

Placeholder content is text included with a document template that provides authors with instructions and guidance on where to specify content. In this text, the author is typically instructed to "click here" and then "enter specific content". When the author clicks anywhere within the placeholder, the entire placeholder text is selected. When the author types, the selection is replaced with the new text. Placeholders are put in specific locations in document templates for the purpose of being replaced by the author with narrative text.

Placeholders have a different appearance so that you may easily differentiate them from surrounding narrative text. Typically, placeholders use a blue font.

Placeholders may be present in titles.
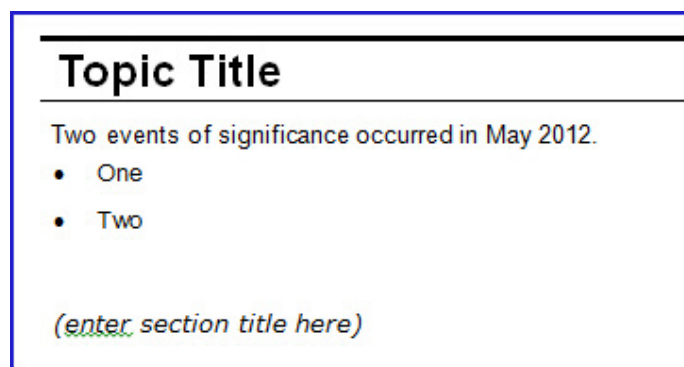
Placeholders may be present or in the narrative text of paragraphs, lists, and table cells.

Math equations

Inserting math equations

Math equations are inserted into your topic the same way as any other element. Editing is performed using the MathType™ equation editor directly from the Microsoft Word canvas.

Inserting math equations (Newline)

Inserting an equation newline inserts the equation element between adjacent elements, as opposed to inserting an equation inline within a text-based element such as a paragraph.

To insert a math equation:

1 In the topic, position the cursor where you want to insert the math equation.

2 Right-click and choose **Insert Before** or **Insert After** from the context menu, and then choose **Figure > Equation**. **Figure > Equation** will be available if your current position in the document allows equations.

The equation editor dialog is displayed.
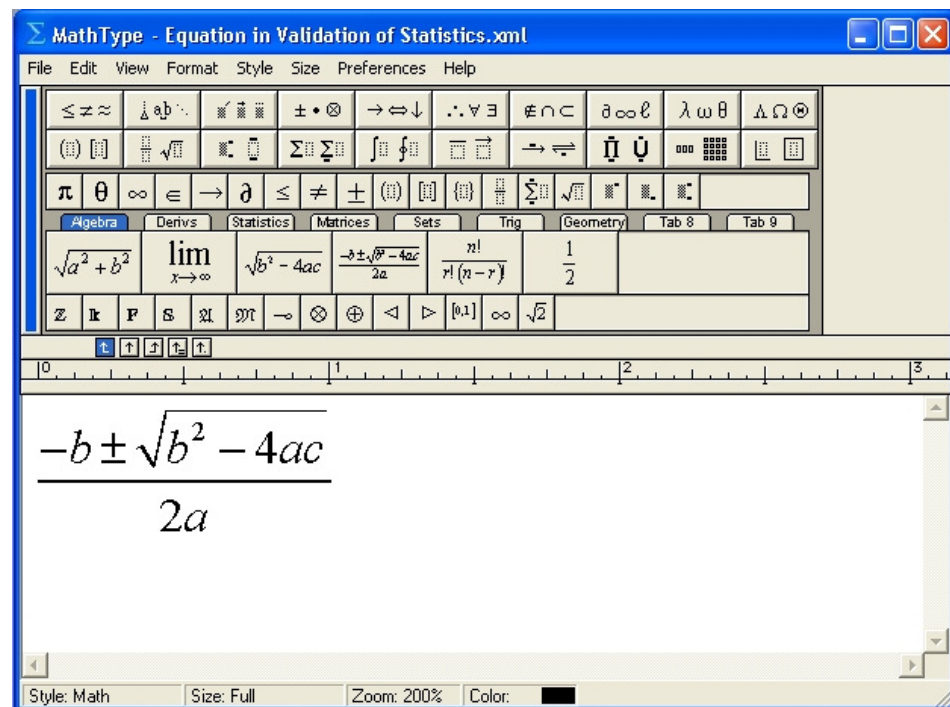
3 Edit the math equation as needed. For more information on the equation editor, refer to the *MathType* documentation.

4 To close the editor, click **File > Close and Return**.

The completed equation is inserted and rendered on the XML Author canvas.
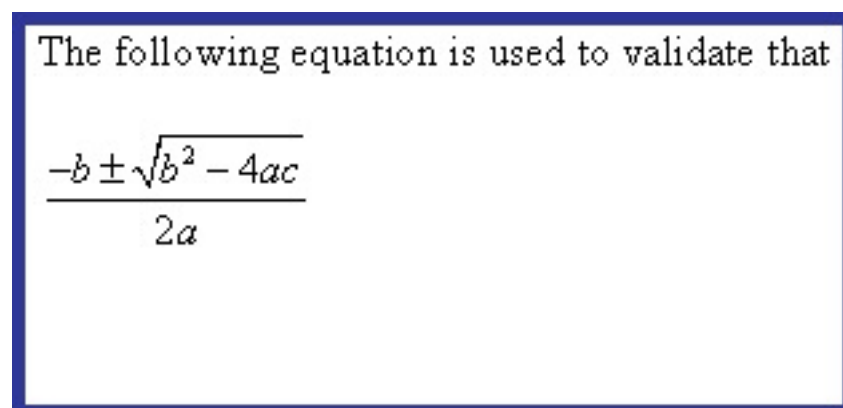
Inserting math equations (Inline)

Math equations may be inserted within a text-based element such as a paragraph. The text may be emphasized. When the document is published, the math equation will be displayed inline within the text. Editing is performed using the MathType equation editor directly from the Microsoft Word canvas.

To insert a math equation:

1 Position the cursor at the location in the text where you want to insert.

2 Right-click and choose **Insert Inline > Equation** from the context menu.

The equation editor dialog is displayed.
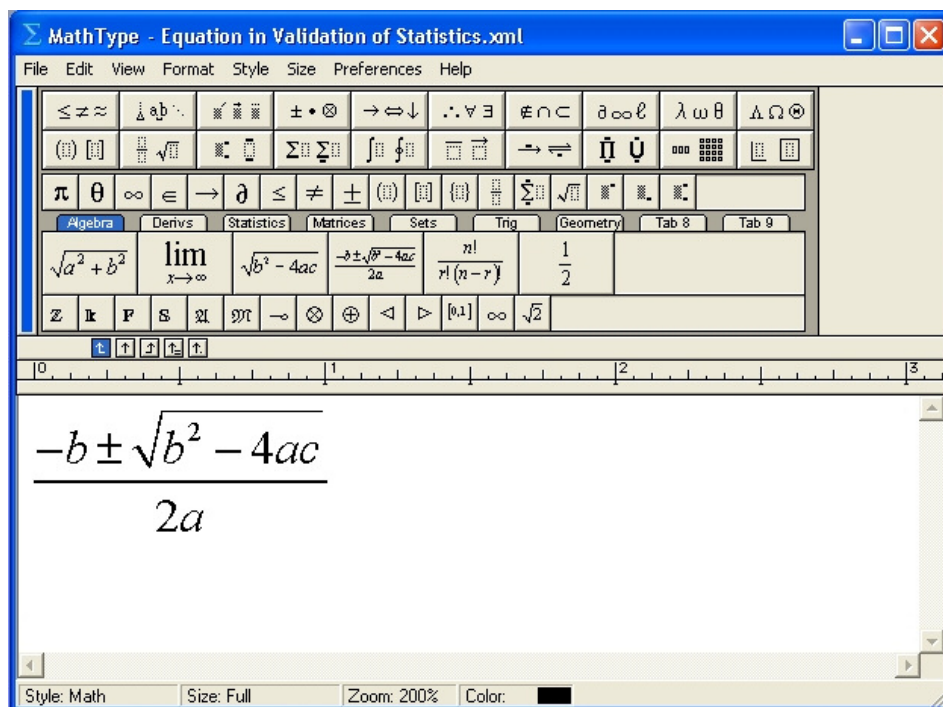
3 Edit the math equation as needed. For more information on the equation editor, refer to the *MathType* documentation.

4 To close the editor, click **File > Close and Return**.

The completed equation is inserted and rendered on the XML Author canvas.
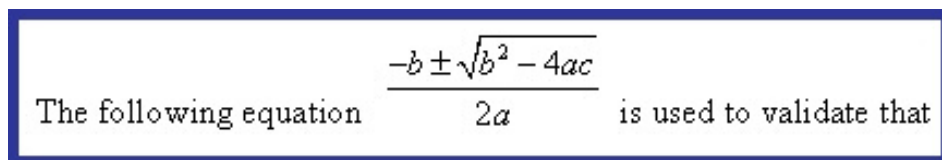
Editing math equations

Math equations are edited using the MathType equation editor directly from the XML Author canvas.

This feature applies to both newline and inline equations.

To edit equations on the Word canvas instead of in the equation editor dialog, change the **Object Editing Preferences** setting in the *MathType* application.
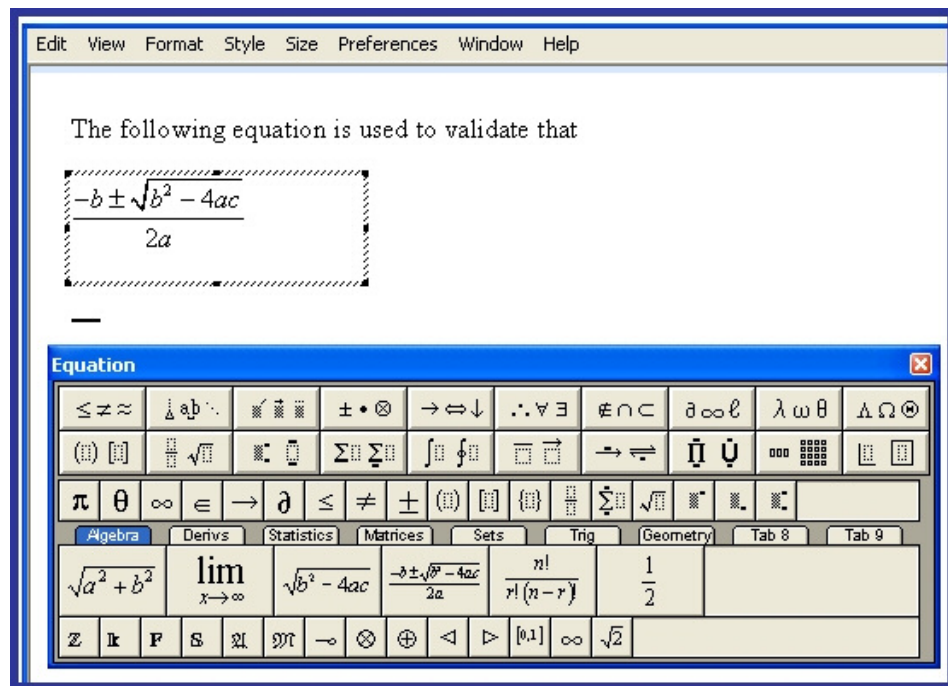
To edit a math equation:

1 Double-click on the desired equation.

The equation editor dialog is displayed.
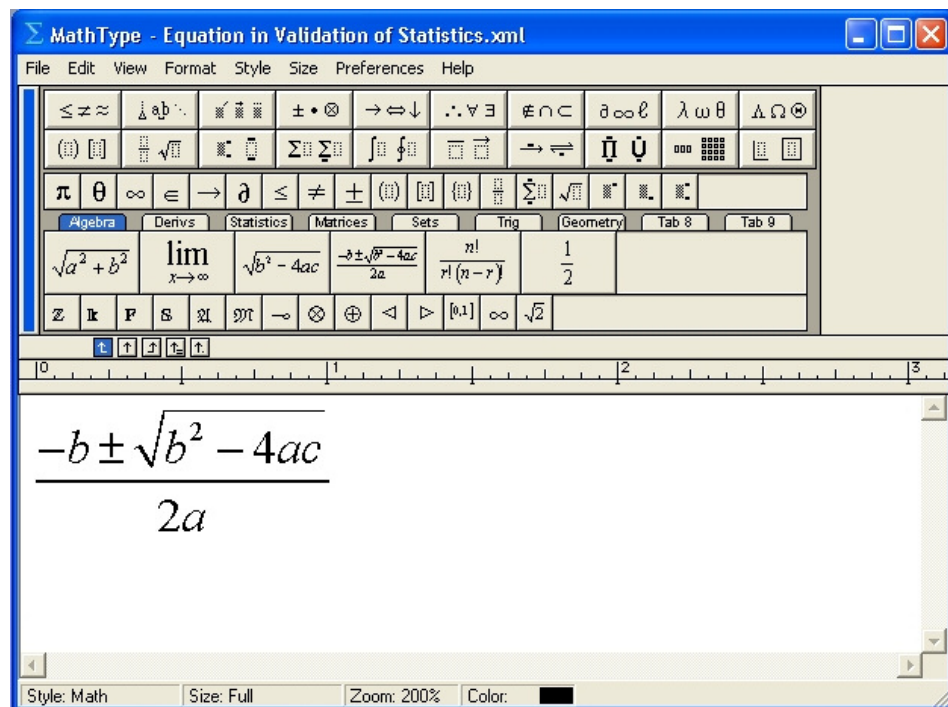
2 Edit the math equation as needed. For more information on the equation editor, refer to the *MathType* documentation.

3 To close the editor, click **File > Close and Return**.

The completed equation is inserted and rendered on the XML Author canvas.

The following equation is used to validate that

$$\frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$

Working with tables

The Working with Tables section provides details on all table-related features and capabilities found in Quark XML Author.

The following table types are supported:

- (CALS) Structured Table

- (DITA) Simple Table

- For information on working with text in tables, see "Entering/pasting text into a selection".

Inserting tables

The **Insert Table** feature works similarly to standard Microsoft Word versions of this feature. Quark XML Author lets you easily add table elements anywhere they are allowed by the rules of the topic type.

To insert a table:

1 In the topic, position the cursor where you want to insert the new table.

2 Use one of the following methods:

- Click **Insert > Table**. In the **Insert Table** dialog, select the desired table type, template and style and define the table size. Click **OK**.

- Right-click and in the context menu, choose **Insert Before** or **Insert After** and then choose the desired table type.

The table is inserted and is ready for text to be entered in the cells. Standard table features such as **Insert Rows**, **Insert Columns**, **Merge Cells**, and **Split Cells** are available.

➡ Word tables can only be inserted using the righ-click context menu method. These are not valid table types in the **Insert Table** dialog.

Inserting a table title

Titles are added to tables on the Microsoft Word canvas.

To add a table title:

1 Right-click immediately above the table or above the table description if one exists.

2 From the conext menu, choose **Table Title**.

3 Enter the desired title text.

The title is added to the table.

Inserting a table description

Descriptions are added to tables on the Microsoft Word canvas.

To add a table description:

1 Right-click immediately above the table.

2 From the conext menu, choose **Description**.

3 Enter the desired descriptive text.

The description is added to the table.

Simple tables

As the name implies, a Simple Table has less functionality and complexity than the full structured table. It is a structured table that should be used when less complexity and easier authoring is needed.

Simple tables are typically used for multi-column tabular data or three-part definition lists.

The following rules apply:

- Only paragraphs are supported. Lists and other media types such as images are not supported.

- Cells may not be split or merged.

- A simple table does not have a caption.

- Many of the custom formatting options available to structured tables cannot be used in simple tables.

Inserting simple tables

Simple tables are inserted on the Word canvas.

Simple tables are inserted just like any other element. The element name in the **Styles** group and context menu is "Simple Table". See "Inserting elements".

Authoring in tables

Authoring in a table cell is similar to authoring on the Word canvas outside of a table. The table cell acts like a miniature Word canvas.

As a convenience for all new cells, the system will automatically insert an empty paragraph so that you can immediately enter text. This behavior may be conigured. The default content element may be set to any available content type.

You can:

- Insert a mixture of content types. For example, paragraphs, images, and lists.

- Apply metadata to the Cell and any content elements within the Cell the same as you do to elements outside of a table. See "Adding content element attributes".

- Copy/cut and paste content between cells of compatible type.

You cannot:

- Insert a table within a table cell.

- Delete a table cell.

Quark XML Author provides a familiar authoring experience. Many of the table features that are available in standard Word are available in Quark XML Author.

Delete, Borders, Height, Width, Alignment features are available at all levels in the table structure: table, column, row and cell (excluding delete cell).

The following features are also available when authoring tables:

- For rows:

  - Insert row above current or selected row.

  - Insert row below current or selected row

- For columns:

  - Insert column left of current or selected column.

  - Insert column right of current or selected column.

- For cells:

  - Merge selected cells.

  - Split current cell.

Inserting elements in a table cell

If you want a paragraph at the beginning of the table cell, enter the text in the text element. Otherwise, insert the desired element type using standard insert techniques. See "Inserting elements".

In our example, we choose **Bulleted List** from the context menu of allowed elements.
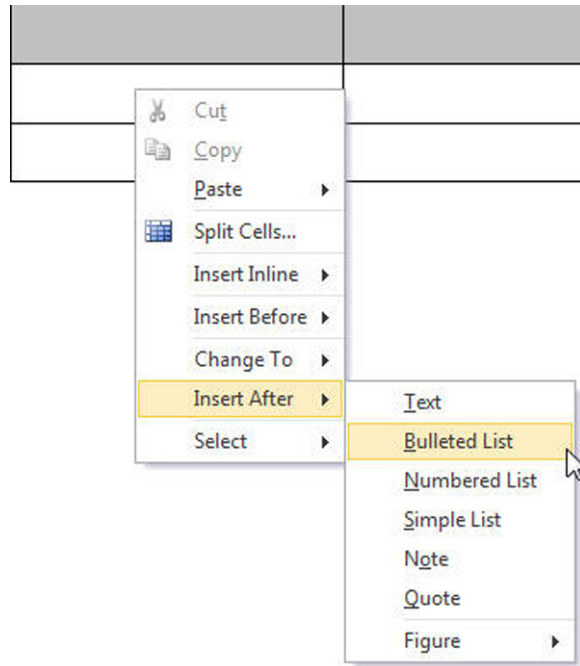
The bulleted list is inserted and ready to receive text. We enter "item one".

Elements inserted below the Cell are immediate children of the Cell.

The content structure for this table cell is represented as the cell with a child bulleted list.

The Select Menu of the bulleted list shows an alternative view of the content structure.
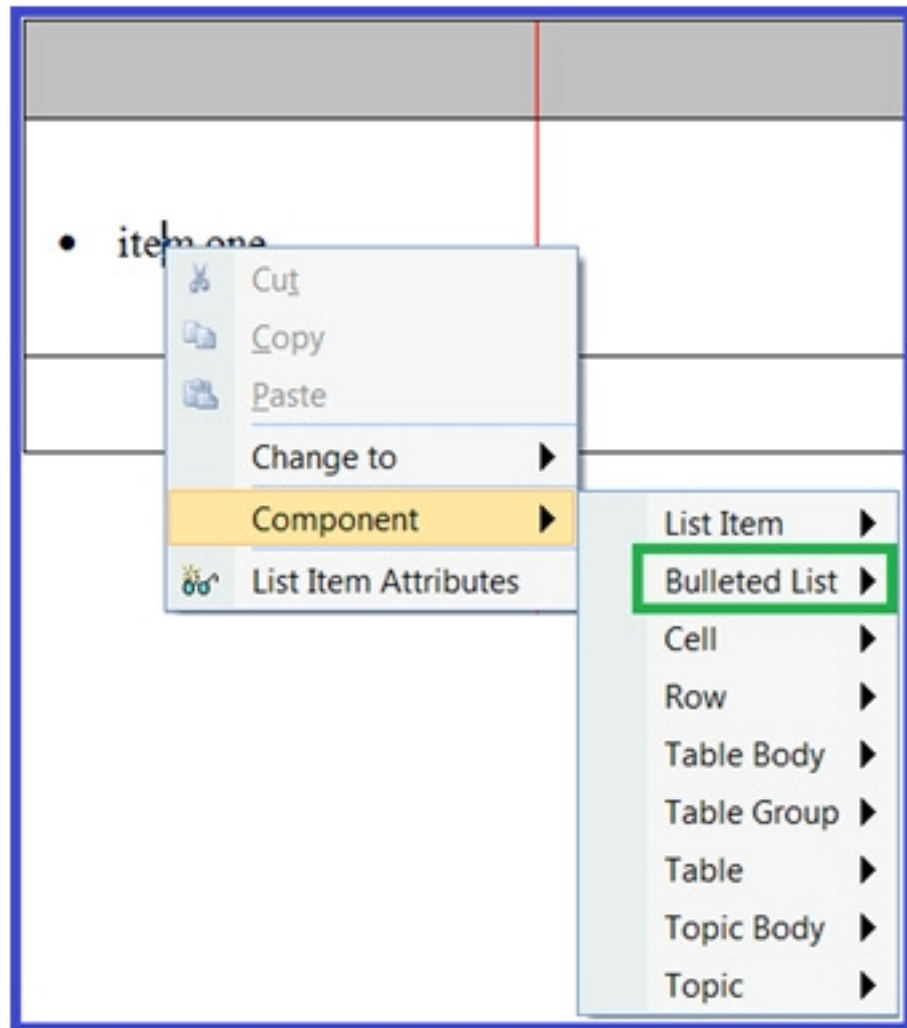
If later you decide that you need text at the top of the cell, simply enter the text in the text element.

The content structure for this table cell is represented as the cell with a child paragraph and a child bulleted list.

Indenting list items in tables

You can indent list items up to one level deeper than the preceding list item (the parent). Indenting moves the selected items in one level into a sub-list under the item immediately preceding the selection. Any list item can be indented except the first list item.

To indent:

1 Place the cursor in the desired list item or select one or more list items.
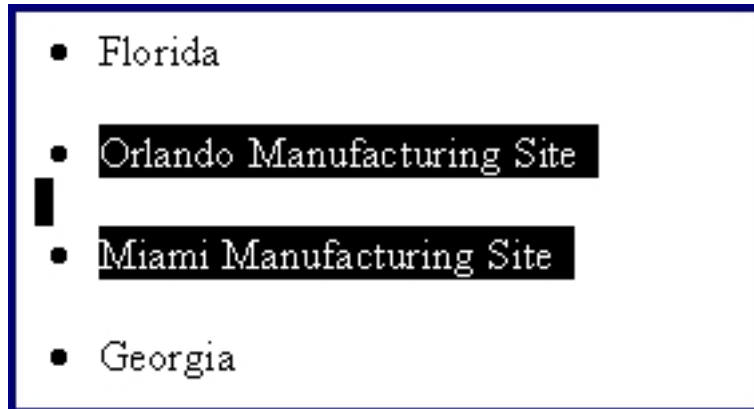
2 For lists in table cells, in the **Home** ribbon, click **Increase Indent**.

The selected list items are indented.

Decreasing indent of list items in tables

You can decrease the indent of list items. This action moves the items out one level from the current list into the parent list.

To decrease an item's indent:

1 Place the cursor in the desired list item or select one or more list items.
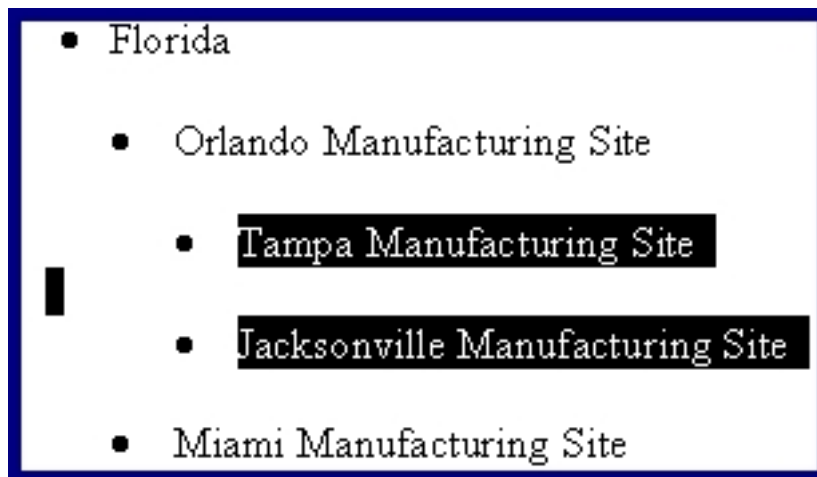
2 For lists in table cells, in the **Home** ribbon, click **Decrease Indent**.

3 user one of the following methods:

- Press Shift + Tab.

- In the **Home** ribbon, click **Decrease Indent**.

The indent of the selected list items is decreased.
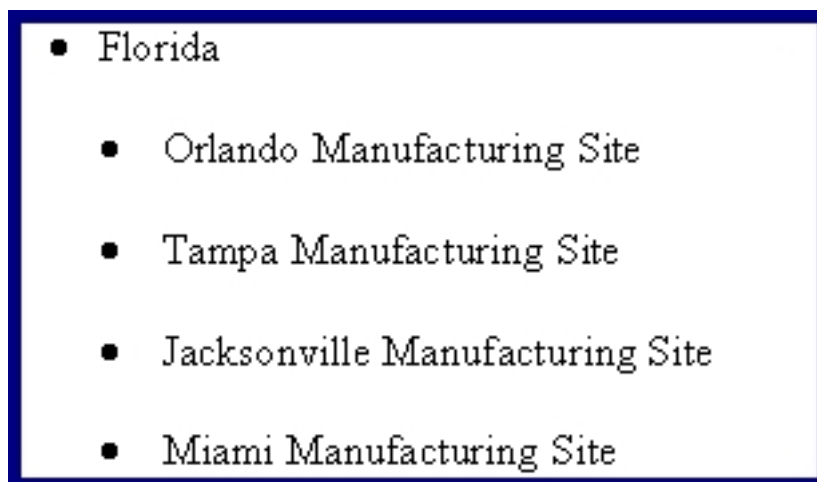
Copying, cutting and pasting table elements

A table element, including its attributes and any child elements, may be copied to a new location in the same table, a different table or to a different topic. Any child elements that are content references are also copied. Table elements that have been cut to the clipboard may be similarly pasted.

➡ This feature applies to elements while the standard cut, copy, paste features in Word apply to text.

You may copy a variety of table elements to the clipboard including the following: single and multiple cells, rows or section. Copying and pasting table elements functions the same as cutting and pasting in terms of how those elements may be pasted.

You may not cut required table elements. Additional configuration restrictions may also apply.

To copy table elements:

1 Select the elements that you want to copy.

2 Right-click on the selection.

3 In the context menu, choose **Copy**.

4 At the location where you want to paste, select similar elements.

For example, if you copied a row, then select a row where you want the copied row to be inserted.

5 Right-click on the selection.

6 In the context menu, choose the **Paste** command.

If the paste command is not available, this indicates that either the copied elements not allowed at this location in the table structure. Check your selection. Or it is possible that the system cannot create new elements at that location, using the copied elements, because the copied elements are not compatible with destination table configuration. This is often the case when copying elements such as rows from one table section and attempting to paste them into a different section or a different table.

For more information on where elements may be pasted, see "About inserting elements and structured authoring".

A copy of the element, its attributes, and any child elements are inserted at the final selection.

Pasting table elements - advanced

This is an advanced discussion of the Paste table elements feature. Table elements have been placed on the clipboard using either the cut or copy table element feature.

The Paste table elements features functions differently depending on several factors. Are any table elements selected at the paste location? If table elements are selected, are the dimensions of the selection different than the dimensions of the table elements you are pasting?

The discussion is organized into the following sections:

- pasting into a selection

- pasting without a selection

Pasting table elements into a selection

When you are pasting into a selection of table elements and the dimensions of the selection are different than the dimensions of the table elements you are pasting, then either repeating or truncation of table cells can occur. The following examples illustrate this logic.

In the first example, the clipboard contains a selection of table cells with the dimension 3 x 2.

A1	B1	C1
A2	B2	C2

At the paste location, you select 2 cells x 3 cells.

When you paste, the results are as follows.

A1	B1
A2	B2
A1	B1

In the second example, the clipboard contains a selection of table cells with the dimension 2 x 3.

A1	B1
A2	B2
A3	B3

At the paste location, you select 3 cells x 2 cells.

When you paste, the results are as follows.

A1	B1	A1
A2	B2	A2

Pasting table elements without a selection

When you are pasting table elements into a table and the dimensions of the table are different than the dimensions of the table elements you are pasting, then the table can potentially grow as necessary to accomodate the elements you are pasting. The following examples illustrate this logic.

In the first example, the clipboard contains a selection of table cells with the dimension 1 x 3 and the content 1, 2, 3.

1	2	3

The paste location is a table with the dimension 1 x 3 and the content A, B, C.

A	B	C

Place the cursor in the first cell of the paste location. The asterisk indicates the cursor position. No text or table elements are selected.

*A	B	C

When you paste, the results are as follows. The content A, B, C becomes 1, 2, 3.

1	2	3

In the second example, the clipboard contains a selection of table cells with the dimension 1 x 3 and the content 1, 2,3.

1	2	3

The paste location is a table with the dimension 1 x 3 and the content A, B, C.

A	B	C

Place the cursor in the second cell of the paste location. The asterisk indicates the cursor position. No text or table elements are selected.

A	*B	C

When you paste, the results are as follows. The content B, C becomes 1, 2 and and an additional column is added to the table. This is true no matter how many rows are in the table at the paste location.

A	1	2	3

In the third example, the clipboard contains a selection of table cells with the dimension 3 x 1 and the content 1, 2, 3.

1
2
3

The paste location is a table with the dimension 3 x 2 and the content A, B, C, D, E, F.

A	D
B	E
C	F

Place the cursor in the first cell of the paste location. The asterisk indicates the cursor position. No text or table elements are selected.

*A	D
B	E
C	F

When you paste, the results are as follows. The content A, B, C becomes 1, 2, 3.

1	D
2	E
3	F

In the fourth example, the clipboard contains a selection of table cells with the dimension 3 x 1 and the content 1, 2, 3.

1
2
3

The paste location is a table with the dimension 3 x 2 and the content A, B, C, D, E, F.

A	D
B	E
C	F

Place the cursor in the second cell of the paste location. The asterisk indicates the cursor position. No text or table elements are selected.

A	D
*B	E
C	F

When you paste, the results are as follows. The content B, C becomes 1, 2 and an additional row is added to the table. This is true no matter how many columns are in the table at the paste location.

A	D
1	E
2	F
3	

Creating tables using copied content

In addition to inserting tables that are empty and ready for content, you can insert a table that is filled with table elements that you have already copied to the clipboard.

You may copy a variety of table elements to the clipboard including the following: single and multiple cells, rows or section. The copied elements and their content are used to create a new table at any allowed location. The new table receives a copy of the metadata of the original table.

See "Inserting tables" for information on inserting empty tables.

To create a table:

1 Select the desired table elements.

2 Right-click on the selection.

3 In the context menu, choose **Copy**.

4 In the topic, navigate to the position where you want to insert the new table.

5 Right-click, and in the context menu, choose **Paste > Paste {element name}** (i.e. Structured Table).

➡ If the paste command is not available, this indicates that either a table is not allowed at this location or that a table is allowed, but the system cannot create a table at that location, using the copied elements, that is compatible with allowed table configurations.

The new table is created and receives a copy of the copied table elements.

Working with pictures

Quark XML Author lets you insert pictures in a topic anywhere they are allowed in your XML schema. An image element is created and Quark XML Author renders the pictures on the Microsoft Word canvas.

Images can be inserted from local and network folders.

Quark XML Author supports the following image file formats:

- BMP
- DIB
- EMF
- EMZ
- EPS
- GIF
- JFIF
- JPE
- JPEG
- JPG
- PNG
- RLE
- TIFF
- TIF
- WMF
- WMZ

Inserting pictures - newline

Inserting a picture newline inserts the image element between adjacent elements as opposed to inserting an picture inline within a text-based element such as a paragraph..

Figure elements may contain <image> elements and therefore may be inserted almost anywhere that an image element is allowed. Images are referenced, not embedded. Images are inserted from a local hard drive, network drive, or repository, and the path to the image is stored in the href attribute of the <image> element.

To insert a picture:

1 Position the cursor where you want to insert the new picture.

2 To insert a picture, click **Insert** ribbon > **Picture**, or right-click and choose one of the following options:

3 In the **Insert Image** dialog, navigate to the picture that you want to insert.

4 Click the picture

5 Click **OK**.

The picture is inserted.

6 To specify where the picture will be positioned by the publishing process, right-click on the picture and choose **Image Attributes**. To position the picture at the end of the previous paragraph, set **Placement** to *inline*. To position the picture underneath the previous paragraph, set **Placement** to *break.*
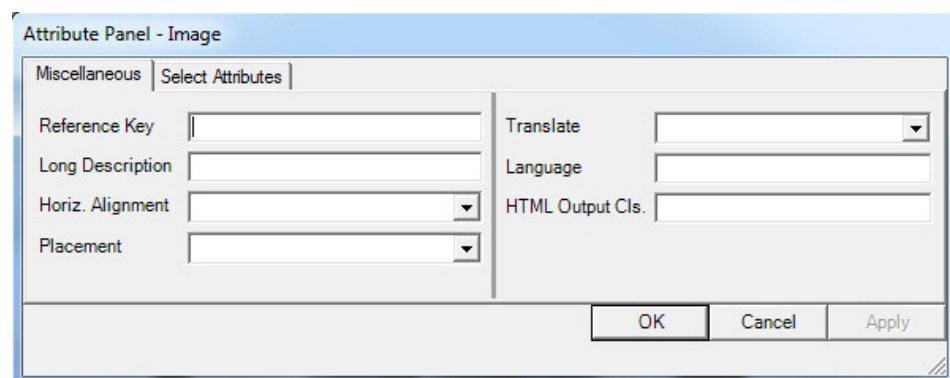
The image element is inserted and Quark XML Author renders the picture on the Microsoft Word canvas.

If an picture file is deleted or if a reference to a picture file is ever broken somehow, you can fix the issue by right-clicking on the picture, selecting **Replace Picture** and selecting the appropriate picture.

Broken picture reference icon.

Inserting pictures - inline

You can insert pictures inline within a text-based element such as a paragraph, . The text can be emphasized. When the document is published, the picture will be displayed inline within the element.

➡ In a topic, image elements may be inserted inline, but figure elements may not.

To insert a picture inline:

1 Right-click at the location in the text where you want to insert the inline picture

2 In the context menu, choose **Insert Inline > Image**:

3 In the **Insert Image** dialog, navigate to the local or network folder that contains the desired picture

4 Click the picture

5 Click **OK**.

The image element is inserted and Quark XML Author renders the picture on the Microsoft Word canvas.

Refreshing picture references

Picture references are refreshed on the Word canvas. This feature attempts to retrieve the source content that is being referenced and refresh the display of that content on the Microsoft Word canvas. Only one picture reference may be refreshed at a time.

To refresh a picture reference:

1 Open the topic that contains the picture reference that you want to refresh.

➡ In Quark XML Author, if you have made any changes to the source picture, the picture must be saved to a file or checked in to a repository in order for those changes to be reflected in a refresh.

2 In this document, locate the desired picture reference.

3 Right-click on the picture reference.

4 In the context menu, choose **Refresh Picture Reference**.

The content reference is refreshed. The picture is replaced with a new copy of the source content.

Working with lists

Lists in Quark XML Author are similar to lists in standard Microsoft® Word. Features that are not applicable to XML word processing have been removed and new features have been added.

List Features

- Indenting list items

- Out-denting list items

- Continue numbering

- Restart numbering

- Set numbering

- Change style

Available List Styles

Lists may be changed from one style to another.

- Bulleted list

- Numbered list

- Paragraph

Expected Behaviors

Pressing the **Enter** key in an empty list item behaves like standard Microsoft®
Word, if that item is the last in the list.
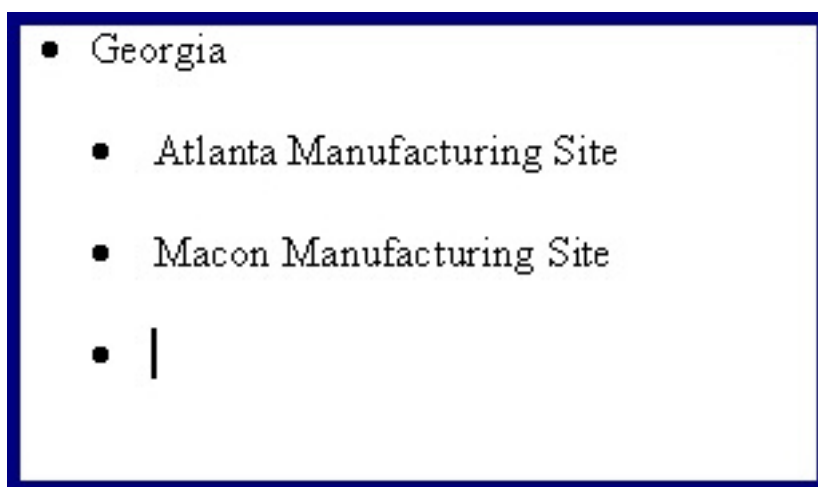
The empty list item is deleted, the list is ended and a paragraph is inserted below
the list.
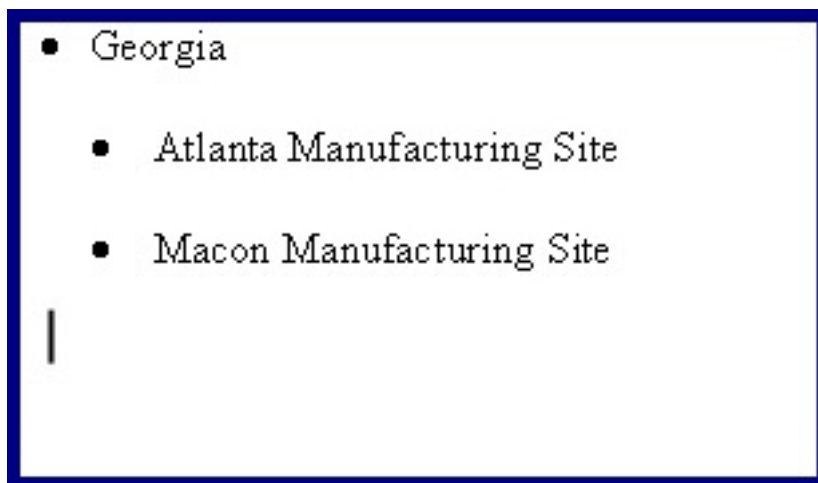
Setting list numbering

This feature is used to specify the number position of the current list item. Sibling
list items that follow are sequentially renumbered based on this new setting. This
applies to all sequentially numbered list types: numeric, roman, big alpha and little
alpha.

1   Right-click on the list item at the point in the list where you want to set the numbering.

2   In the context menu, choose **Set List Numbering**.

The **Set List Numbering** dialog is displayed. **Start At** displays the relative position of the current list item whether it is numeric or alpha. For example, letter "C" equates to position "3".
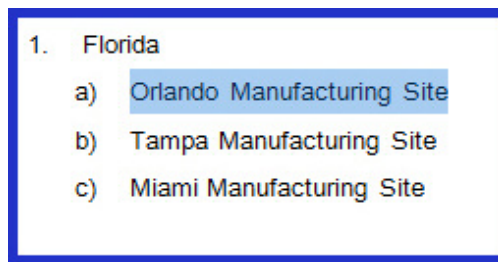
3   In **Start At**, specify the new position for the list item as a numeric value.
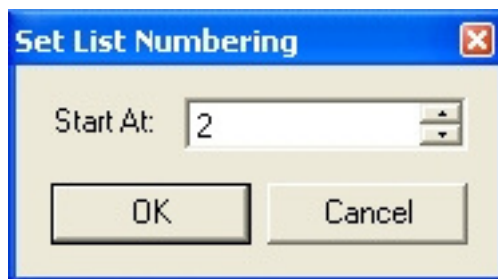
4   Click **OK**.

The numbering of the selected list item and siblings that follow it is set.

Restarting list numbering

This feature is used to restart the numbering on a list that is a continuation of earlier list.

1   In the desired list, right-click on a list item.

- Florida

  a. Orlando Manufacturing Site

  b. Tampa Manufacturing Site

  c. Miami Manufacturing Site

- Georgia

  d. Atlanta Manufacturing Site

  e. Macon Manufacturing Plant

2 In the context menu, choose **Restart Numbering**.

The numbering of the selected list is restarted.

- Florida

  a. Orlando Manufacturing Site

  b. Tampa Manufacturing Site

  c. Miami Manufacturing Site

- Georgia

  a. Atlanta Manufacturing Site

  b. Macon Manufacturing Site

Continuing list numbering

This feature is used to associate the current list with an earlier list such that the numbering of the current list is a continuation of the earlier list.

1 In the desired list, right-click on a list item.

- Florida

  a. Orlando Manufacturing Site

  b. Tampa Manufacturing Site

  c. Miami Manufacturing Site

- Georgia

  a. Atlanta Manufacturing Site

  b. Macon Manufacturing Plant

2 In the context menu, choose **Continue Numbering**.

The numbering of the selected list is a continuation of the earlier list type.

- Florida

  a. Orlando Manufacturing Site

  b. Tampa Manufacturing Site

  c. Miami Manufacturing Site

- Georgia

  d. Atlanta Manufacturing Site

  e. Macon Manufacturing Site

Indenting list items

You can indent list items up to one level deeper than the preceding list item (the parent). Indenting moves the selected items in one level into a sub-list under the item immediately preceding the selection. Any list item can be indented except the first list item.

To indent:

1 Place the cursor in the desired list item or select one or more list items.
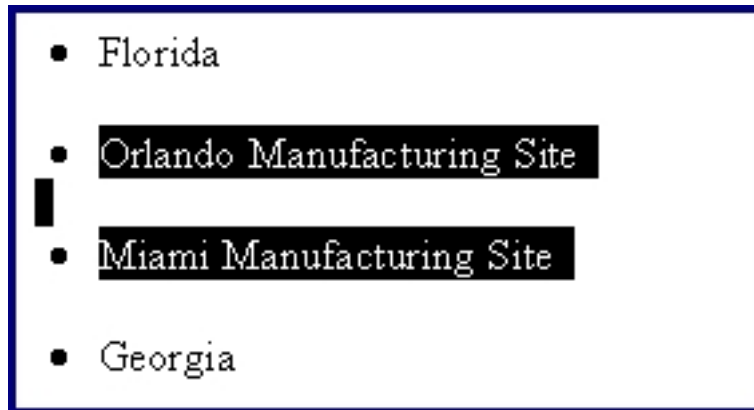
2 Use one of the following methods:

  - Press **Tab.**

  - In the **Home** ribbon, click **Increase Indent**.

The selected list items are indented.

Decreasing indent of list items

You can decrease the indent of list items. This action moves the items out one level from the current list into the parent list.

To decrease an item's indent:

1 Place the cursor in the desired list item or select one or more list items.
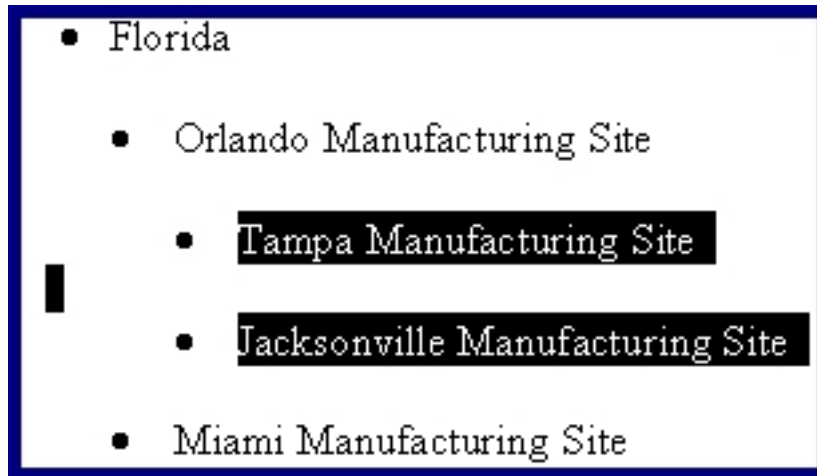
2 Use one of the following methods:

- Press **Shift + Tab.**

- In the **Home** ribbon, click **Decrease Indent**.

The indent of the selected list items is decreased.
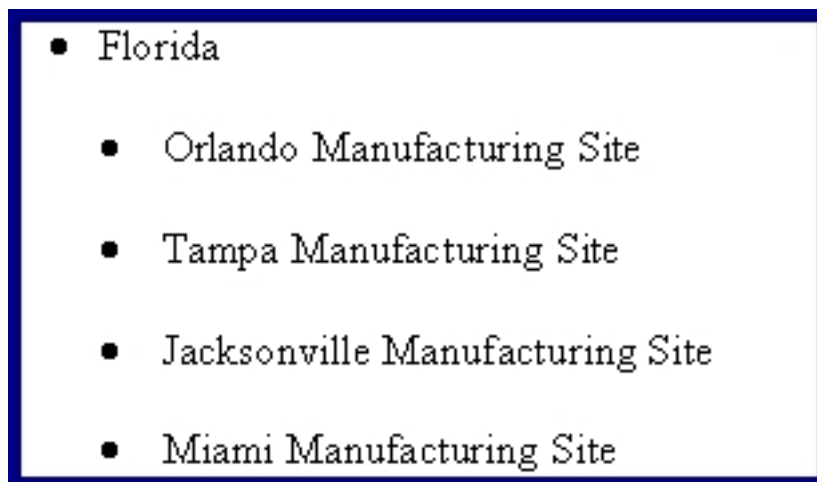
About changing styles

An element may be changed from one style to another. The element is replaced with a new element based on the new style. The content and metadata is copied to the new element. Styles are changed on the Word canvas.

Rules for changing styles
General
- If an element is required, its style may not by changed.

- If an element has any child elements that are required, the style of the parent may not by changed.

- If an element has child elements, the style of the parent element may changed "From" one style "To" another style if the "To" style allows for the same type of children. For example, if the items in a bulleted list have child paragraphs and numbered list items may have child paragraphs, then those bulleted list items may be changed to numbered list items.

- If multiple elements are selected, all elements must be the same type.

- If multiple elements are selected, all child elements of those parent elements must also be selected.

Paragraphs
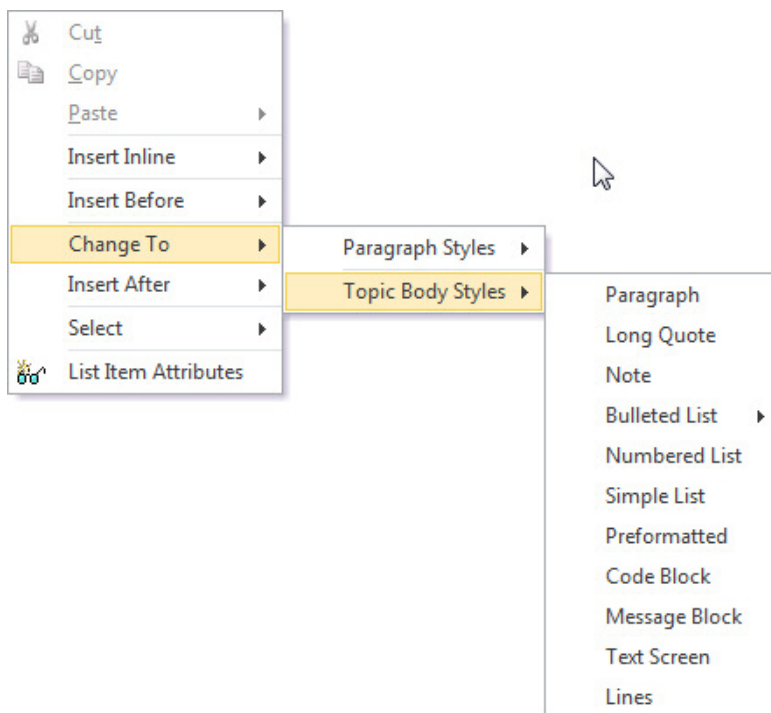- If sections exist, the selected paragraphs must belong to the same section.

Lists
- If multiple items are selected, these items must belong to the same list.

Changing styles

To change the style of an element:

1 Right-click on the element.

2 In the context menu, choose **Change To**.

3 Choose the new style.

The element is changed to the selected new style.

➡ If the system displays a submenu that contains the commands **Merge** and **Don't Merge**, then you have chosen a new style that is the same style as an adjacent element. The adjacent element is a type of list. The system is asking if you want to merge your selection with that adjacent list. For example, say you select two paragraphs and change their style to bulleted list items. Immediately below the paragraphs is a bulleted list. The system prompts you to merge the two paragraphs into the bulleted list when it converts the paragraphs into bulleted list items.

Changing the style of a list

An entire list may be changed from one list style to another list style or to paragraphs. For example, a bulleted list may be changed to a numbered list and vice versa. List styles are changed in the document window.

To change the style of a list:

1 Select all items in the list.

2 Right-click on the selection. In the context menu, choose **Change to** and then select the new style.

3 Or, on the **Home** ribbon > click the new style.

- Paragraph

- Bullets

- Numbering

The current list is deleted. If a list style was selected, a new list is created using the selected list items and the selected list style. If the paragraph style was selected, new paragraphs are created using the content of the selected list items
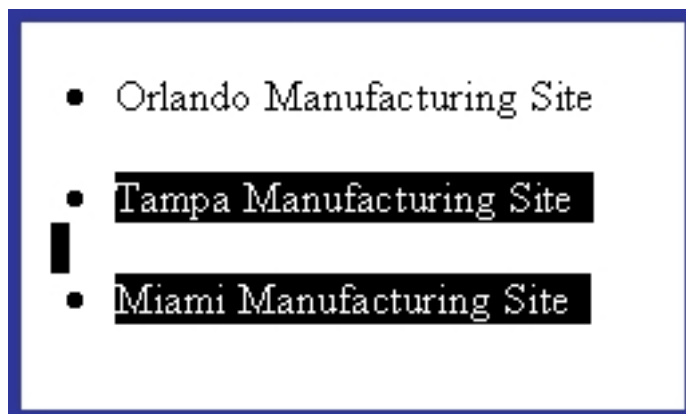
Changing the style of list items

A subset of a list may be changed from one list style to another list style or the list items may be changed to paragraphs. For example, the first five items in a bulleted

list may be changed to numbered list items. List items styles are changed in the topic window.

The following rules apply:

- If multiple items are selected, these items must belong to the same list.

- Any selection, single or multiple items, must include either the first item in the list or the last item. A selection that contains only an item or items in the "middle" of the list may not be restyled. The first and last items are the only items whose style may be changed individually. The reason is that this action effectively removes the item from the list and replaces it with a different element type that now exists just before or after the list, respectively.

- If a list item is required, its style may not be changed.

- List items may have child content if the new style allows for the same type of child content. If we refer to the style of the selected list items as the "From" style, then the selected list items may be changed to the "To" style if the "To" style allows for the same type of content in its children. For example, if the items in a bulleted list have child paragraphs and numbered list items may have child paragraphs, then those bulleted list items may be changed to numbered list items.

To change the style of a list subset:

1 Select the desired list subset.

2 Right-click on the selection. In the context menu, choose **Change to**, and then select the desired style.

3 Or, on the **Home** ribbon > click the desired list style.

- Paragraph

- Bullets

- Numbering

The selected list items are removed from the current list. If a list style was selected, a new list is created using the selected list items and the selected list style. If the paragraph style was selected, new paragraphs are created using the content of the selected list items.

Changing paragraphs to a list

A selection of paragraphs can be changed into a list. For example, a selection of five paragraphs can be changed to a bulleted list. Paragraphs are changed into a list in the topic window.

The following rules apply:

- If sections exist, the selected paragraphs must belong to the same section.

- If a paragraph is required, its style may not by changed.

- Paragraphs may have child content if the new style allows for the same type of child content. If we refer to the style of the selected paragraphs as the "From" style, then the selected paragraphs may be changed to the "To" style if the "To" style allows for the same type of content in its children. For example, if the paragraphs have child bulleted lists and numbered list items may have child bulleted lists, then those paragraphs may be changed to numbered list items.

To change a paragraph to a list:

1 Select the desired paragraphs.

2 Right-click on the selection. In the context menu, choose **Change to** and then select the desired list style.

3 Or, on the **Home** ribbon > click the desired list style.

- Bullets

- Numbering

The selected paragraphs are removed. A new list is created using the selected paragraphs and the selected list style.
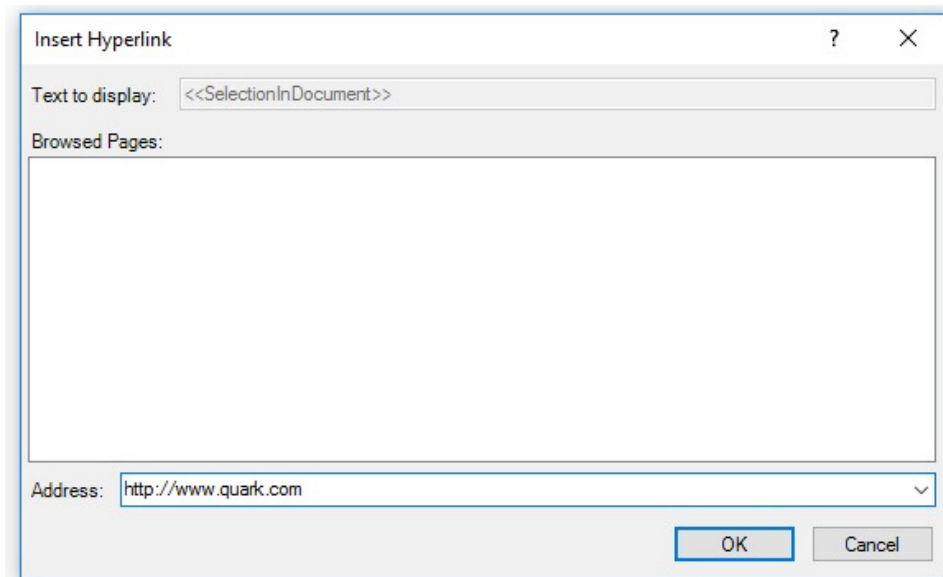
Inserting hyperlinks

Hyperlinks are inserted directly on the Microsoft Word canvas.

To insert a hyperlink:

1 Select the word or phrase where you want to insert the hyperlink.

2 Click **Insert** ribbon > **Hyperlink**.

The **Insert Hyperlink** dialog is displayed.

3   In **Text to display**, enter the text that will be displayed as the link text on the Word canvas. This link text will replace the text currently selected on the canvas.

4   Select a web address in the **Browsed Pages** list or specify it in the **Address** field.

5   Click **OK**.

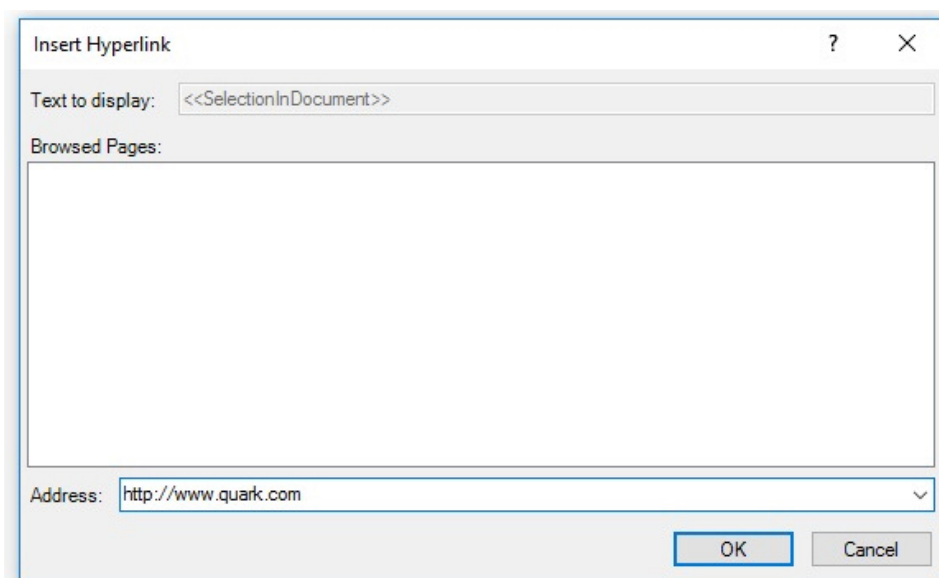The hyperlink is inserted at the specified location.

➡   The link text can be changed manually directly on the Microsoft Word canvas.

Hyperlinks can also be applied to inline images in Quark XML Author.

To apply a hyperlink to an inline image:

1.   Select the inline image to apply the hyperlink to.

2.   Click **Insert** ribbon > **Hyperlink**.

3.   The **Insert Hyperlink** dialog is displayed.

4. Select a web address from the **Browsed Pages** list or specify an address in the **Address** field.

5. Click **OK.** The hyperlink is applied to the image.

Hyperlinks can be edited, removed or opened via the contextual menu displayed by right-clicking on the image the hyperlink was applied to.

➡ The **Text to display** field will be disabled in the **Insert Hyperlink** dialog when applying hyperlinks to an inline image.

➡ Hyperlinks cannot be applied to newline images.

Inserting symbols

Symbols are inserted into your narrative content on the Microsoft Word canvas.

To insert a symbol:

1 Place the cursor where you want the symbol to be inserted.

2 Click **Insert** ribbon > **Symbol**.

3 In the **Symbol** dialog, choose the desired symbol and then click **Ok**.

The symbol is inserted at the cursor position.

Working with notes

The working with notes section provides details on all notes-related features and capabilities found in Quark XML Author.

This includes footnotes.

About footnotes

The Footnote feature in Quark XML Author is similar to the feature found in Microsoft Word. Footnotes are added to a word or phrase and allow the user to reference a piece of content that is displayed at the end of the page. Typically, footnotes are used to provide detailed comments.

When you insert a footnote, this feature creates a Footnote and a Footnote Reference. A superscript of the note's number is displayed next to the word or phrase you selected. This is the Footnote Reference which references the note text that you type in the Footnote. Footnotes are listed under a separator located at the bottom of the topic
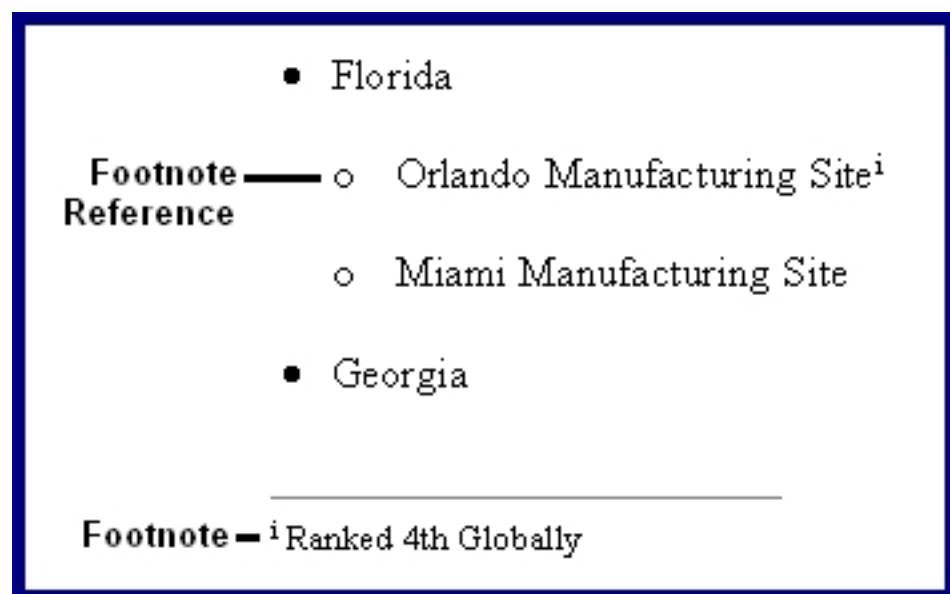
Footnote rules:

- Footnotes use lowercase Roman numerals (i.e., i, ii, iii, iv).

- When narrative text that contains a footnote is copied and pasted into the same topic, the footnote is also copied. This is also true if the entire element is copied and pasted.

Inserting footnotes

Footnotes are added to a word or phrase.

To insert a footnote:

1 Select the text that you want to receive the footnote.

2   Click **Insert** ribbon > **Insert Footnote**.

A footnote reference is added to the selected text. To the right of the selected text, the "number" of the new footnote is displayed. The end of the page is scrolled into view and the cursor is positioned in the new footnote.
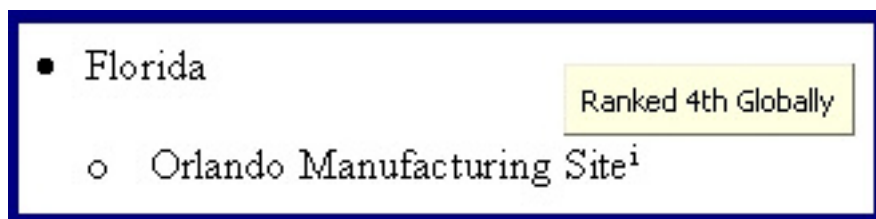

3   Enter the text of the footnote.

The footnote is complete.

➡ When the cursor is placed over the footnote reference, the footnote is displayed in a tooltip.

About table notes

The Table Note feature in Quark XML Author is similar to the feature found in Microsoft® Word. Table Notes are added to a word or phrase in a table and allow the user to reference a piece of content that is displayed at the end of the table. Typically, table notes are used to provide detailed comments.

When you insert a table note, this feature creates a Table Note and a Table Note Reference. A superscript of the note's number is displayed next to the word or phrase you selected. This is the Table Note Reference which references the note text that you type in the Table Note. Table notes are listed under a separator located immediately underneath the table.

Table note rules:

- Table notes use the Arabic numerals numbering scheme (i.e., 1, 2, 3).

- A table note may be the target of a cross-reference.

- When narrative text that contains a table note is copied and pasted into the same topic, the table note is also copied. This is also true if the entire element is copied and pasted.

Inserting table notes

Table Notes are added to a word or phrase in a table.

To insert a table note:

1 Select the text that you want to receive the table note.

2 Click **Insert** ribbon **Insert Table Note**.
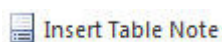
A table note reference is added to the selected text. To the right of the selected text, the "number" of the new table note is displayed. The end of the table is scrolled into view and the cursor is positioned in the new table note

3 Enter the text of the table note.

The table note is complete.
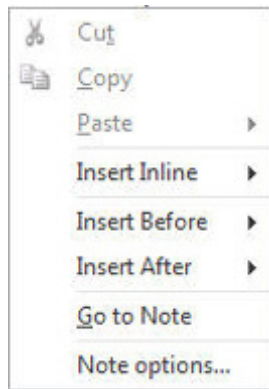

Assigning a starting number to a note

A starting or initial number may be assigned to a note (footnote).

To assign a starting number to a note:

1 Right-click on the desired note.

The context menu is displayed.

2   In the context menu, choose **Note options**.

The **Note Options** dialog is displayed.

➡   The **Number Format** depends on the type of the note (footnote).

3   In **First Note Number**, specify the ordinal value at which numbering should start. For example, set **First Note Number** to 4 to start numbering at 4.

The starting number is assigned to the note.

Assigning a custom mark or citation to a note

A custom mark or citation may be assigned to a note (footnote, endnote, table note, etc.) as an alternative to assigning number.

To assign a custom mark or citation to a note:

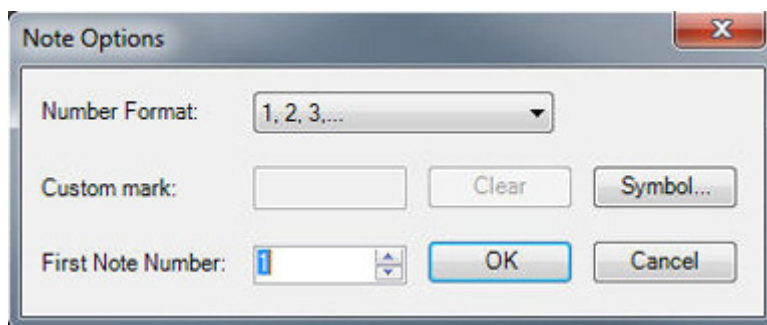1   Right-click on the desired note.

The context menu is displayed.
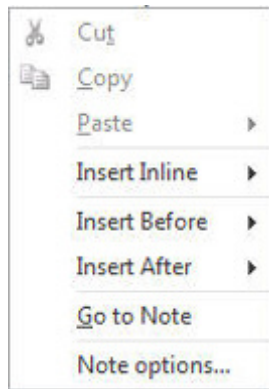
2 In the context menu, choose **Notes options**.

The **Note Options** dialog is displayed.

➡ The **Number Format** depends on the type of the note (footnote, endnote, table note, etc.).
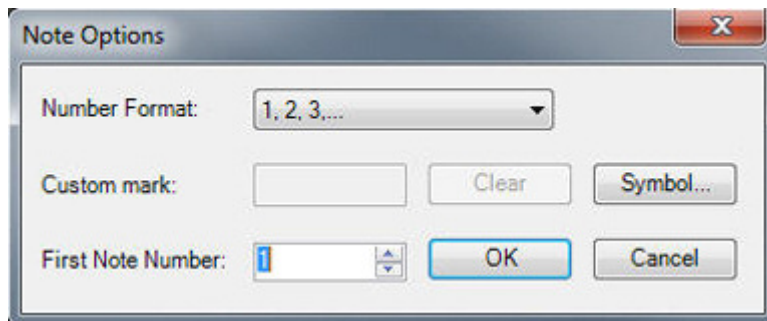
3 To specify the custom mark, use one of the following methods:

- In **Custom mark**, enter the character to use instead of the "number".

- Click Symbol to select from the list of available citations in Microsoft Word.

The custom mark or citation is assigned to the note.

Going to a reference from a note

A note may be followed back to the note reference (footnote, endnote, table note, etc.).
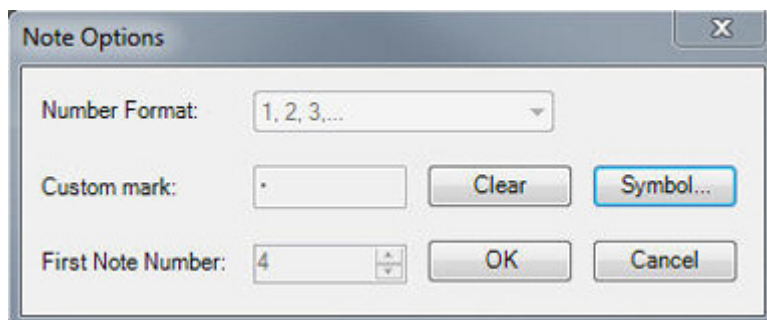
To go to a note reference:

1 Right-click on the desired note.

The context menu is displayed.
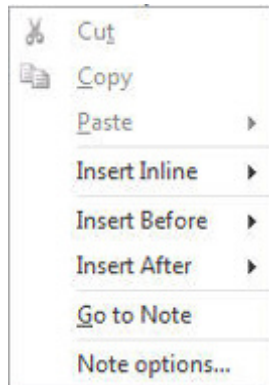
2 In the context menu, choose **Go to Note**.

The note reference is scrolled into view and the topic cursor is moved to the note reference.

Deleting a note

A note reference and its associated note (footnote, endnote, table note, etc.) may be deleted from the text to which it was added.

To delete a note:

1 Position the cursor to the left or the right of the superscript number of the note.

2 Press **Delete** or **Backspace**.

The note and note reference are deleted.

Working with inline elements and emphasis

The Working with Inline Elements and Emphasis section provides details on all inline element and emphasis-related features and capabilities found in Quark XML Author.

About inline elements/emphasis

Inline elements in Quark XML Author are referred to as "emphasis" and just as you can verbally emphasize (or stress) a particular word or phrase when you speak, Quark XML Author allows you to place emphasis on text. Metadata can be applied to emphasis. This is used to identify or describe text and is often used for search and retrieval purposes. Metadata may also be applied as part of a filtering strategy.

Emphasis applied to "New York City".

What emphasis has been applied?

The **Home** ribbon > **Emphasis** group displays the emphasis that was most recently applied to the current cursor position or to the current text selection. The **Home** ribbon > **Emphasis** group displays the **Normal** emphasis when no emphasis has been applied. You can move the cursor to different positions in the topic to see which text has had Emphasis applied to it.

The context menu displays all emphases that have been applied to the current cursor position or to the current text selection.
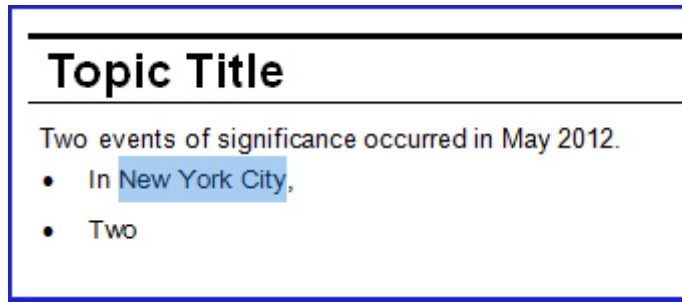
Emphasis Attributes

Emphasis that has been applied to text may have its own attributes.

Applying emphasis

One or more emphasis may be applied to a word or phrase. This is done using the **Emphasis** tool.

To apply emphasis:

1   Select the text to which you want to apply emphasis.

2   In the **Home** ribbon > **Emphasis** group, select the desired emphasis.

The text receives the style/formatting that is assigned to the selected emphasis. The **Emphasis** group displays the most recently applied emphasis.
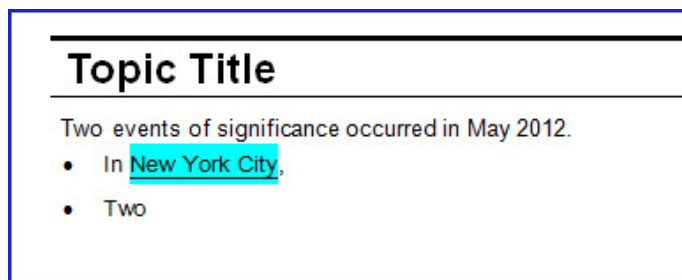
Emphasis applied to "New York City".

3   To apply additional emphasis, select the desired emphasis in the **Emphasis** group.

The emphasis is applied to the selected word or phrase.

➡   Some emphases may not be layered. Therefore, the **Emphasis** group will only display emphases that are allowed at the current cursor position.

Removing emphasis

Emphasis may be easily removed from the word or phrase to which it was added.

To remove an emphasis:

1   Right-click on the desired emphasis.

2   In the context menu, choose **Remove {emphasis name} Emphasis**.

The emphasis is removed from the word or phrase.

Working with attributes

The Working with Attributes section provides details on all attribute-related features and capabilities found in Quark XML Author.

Adding map attributes

You can add, edit, and delete attribute values for a map using the **Document Properties Pane**.

This feature does not apply to topics.

This feature does not apply to content elements such as paragraphs, lists, images, and inline elements/emphasis.

This feature does not apply to map elements such as topicrefs, topic headings, and topic groups.

To add attribute values:

1 Click **Home** ribbon > **Properties** or **View** ribbon > **Properties**.

2 Click the **Document** tab.

3 In the **Document** Pane, expand the panel that contains the attribute you want to add.

For example, expand the **Metadata** panel to display the **Audience** attribute.

4 Specify the new value.

Values may be entered in the following ways:

- Typing a value in a text box.

- Choose a value from a drop-down list box.

- Clicking **Add {element name}** and using the **Add {element name}** dialog box to specify more complex values.

The attribute values you specified are added to the map.

If you later need to edit or delete these values, you can do that in the Pane as well. For example, to edit a value that was added using the **Add {element name}** dialog box, simply click on that value. The **Edit {element name}** dialog is displayed. The **Edit** dialog box also contains the **Delete** feature.

Adding element attributes

You can add, edit, and delete attribute values for a map element using the **Attributes Panel**.

This feature does not apply to content elements such as paragraphs, lists, images, and inline elements/emphasis.

To add attribute values:

1 Right-click the desired content element.

The Context Menu is displayed.

2 At the bottom of the Context Menu, click {content element name} Attributes.

The Attribute Panel dialog box is displayed.

The **Attribute Panel d**ialog box dynamically changes to display the attributes specific to the selected content element. Each tab displays a category of attributes. For example, an Image has a **Horizontal Alignment** attribute that is used by the publishing engines to know where to place an image in the publication.

3 In the **Attribute Panel** dialog box, specify attribute values as needed.

Values may be entered in the following ways:

- Type a value in a text box.

- Choose a value from a drop-down list box.

4 Click **OK**.

The attribute values you specified are added to the selected content element.

Adding topic attributes

You can add, edit, and delete attribute values for a map using the **Document Pane**.

This feature does not apply to content elements such as paragraphs, lists, images, and inline elements/emphasis.

This feature does not apply to maps.

This feature does not apply to map elements such as topicrefs, topic headings, and topic groups.

To add attribute values:

1   Click **Home** ribbon > **Properties** or **View** ribbon > **Properties**.

2   Click the **Document** tab.

3   In the **Document** tab, expand the panel that contains the attribute you want to add.

For example, expand the **Metadata** panel to display the **Audience** attribute.

4 Specify the new value.

Values may be entered in the following ways:

- Typing a value in a text box.

- Choose a value from a drop-down list box.

- Clicking **Add {element name}** and using the **Add {element name}** dialog box to specify more complex values.

The attribute value is added to the topic.

If you later need to edit or delete these values, you can do that in the Pane as well. For example, to edit a value that was added using the **Add {element name}** dialog box, simply click on that value. The **Edit {element name}** dialog is displayed. The **Edit** dialog box also contains the **Delete** feature.

Adding content element attributes

You can add attribute values for content elements, such as paragraphs, lists, images, and inline elements/emphasis, using the **Attribute** panel.

To add attributes values to a content element:

1 Right-click the desired content element.

2 From the context menu, choose **{content element name} Attributes**.

The **Attribute Panel** dialog box is displayed.

➡ The **Attribute Panel** dialog box dynamically changes to display the attributes specific to the selected content element. Each tab displays a category of attributes. For example, an Image has a **Horizontal Alignment** attribute that is used by the publishing engines to know where to place an image in the publication.

3 In the **Attribute Panel** dialog box, specify attribute values as needed.

Values may be entered in the following ways:

- Type a value in a text box.

- Choose a value from a drop-down list box.

4 Click **OK**.

The attribute values you specified are added to the selected content element.

Adding content element attributes in Word tables

You can add attribute values for content elements in an embedded Word Table.

Attribute values can be added to tables, table rows, table cells and paragraphs.

To add attributes values to a content element:

1 Select the desired content element.

2 In the **Attributes** dialog, specify the attribute value.

3 Click **OK**.

The attribute values you specified are added to the selected content element.

Working with referenced content

The Working with referenced content section provides details on all reference-related features and capabilities found in Quark XML Authot

About cross-references

Cross-references in Quark XML Author are similar to those in Microsoft Word. The user is able to click on a cross-reference and follow the link to a specified location within a topic or to a separate topic. A cross-reference is added to a word or phrase, and has a target or destination.

The resulting link contains descriptive text.

Inserting a cross-reference

Cross-references are added to a word or phrase.

The destination of the cross-reference you want to insert must already exist.

To insert a cross-reference:

1 Open the "destination" topic that you want as the target of the cross-reference.

➡ In Quark XML Author, if you have made any changes to the destination topic, the topic must be saved before a reference can be created. Saving creates IDs for the topic elements which allow them to be referenced.

➡ To insert a reference to a specific version of a topic open the earlier (specific) version of the topic rather than the latest version.

2 In the destination topic, locate the content you want as the target.

3 Right-click on the content.

4 In the context menu, choose **Select**, select the desired element, and then click **Copy**.

➡ Ensure that you copy the element to which you want to link rather than the title of that element. For example, copy the Section rather than the Section Title. Although a link to a title is supported by the XML language, it is not necessarily supported by publishing engines.

5 Open the "source" topic where you want to insert the cross-reference.

6 In the source topic, navigate to the word or phrase where you want to insert the cross-reference.

7 Select that word or phrase.

8 Use one of the following methods to insert the cross-reference:

- Right-click on the selection and choose **Insert Cross-Reference** from the context menu.

- Click **Insert** ribbon > **Cross-reference**.

The cross-reference is inserted. Typically, the title of destination becomes the link text replacing the selected word or phrase, but this may be customized. To manually change the link text, see "Changing cross-reference link text".

Inserting a Cross reference using the Cross-reference Dialog

Cross-references can now be added using the new **Cross-reference** dialog. Authoring is possible while the dialog is open. This provides a more natural, seamless authoring experience.

The dialog lists both **Reference Types** and **Insert Reference To** drop-downs. The former is a list of allowable reference types of a target. The latter contains dynamic properties of the referred type, which can help construct a more meaningful cross-reference string.

Cross-references are added to a word or phrase.

The destination of the cross-reference you want to insert must already exist.

To insert a cross-reference:

1. Click **Insert Ribbon** > **Cross-reference** > **Insert Cross-reference**
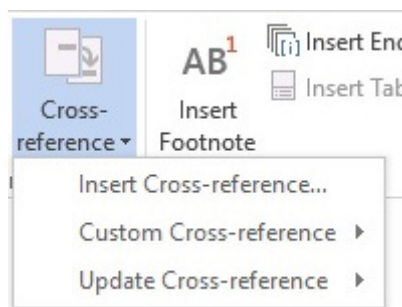
2. The **Cross-reference** dialog opens.

3. Select a valid reference type from the **Reference Type** drop-down menu.
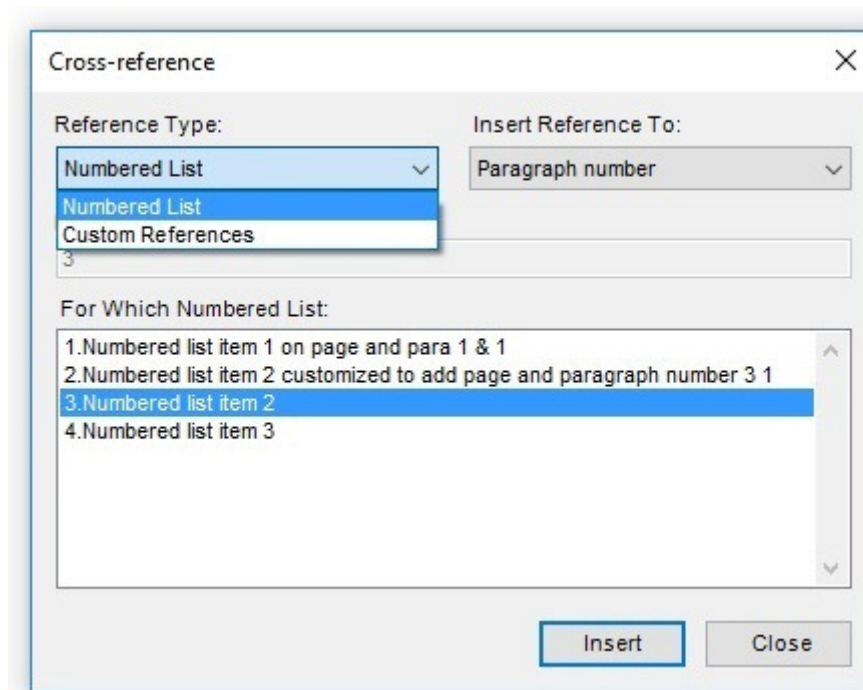
4. Select the dynamic properties of the selected target from the **Insert Reference To** drop-down menu.
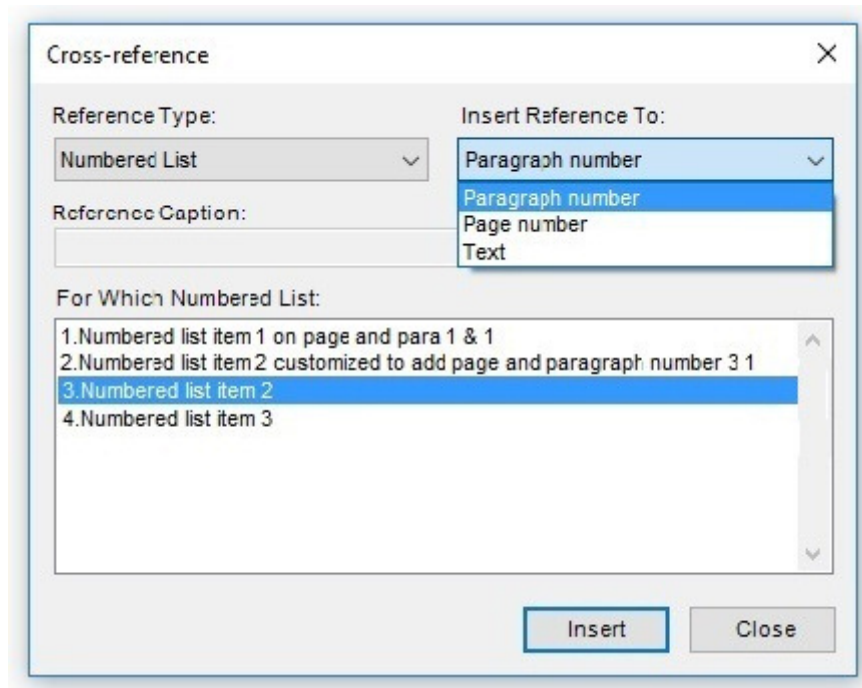
5. Select an item from **For Which Numbered List** and click **Insert** to insert the cross reference

The cross-reference is inserted.

Using a cross-reference

To follow a link, press **CTRL** and click the link.

On the Word canvas, the target of the cross-reference link is displayed or scrolled into view.
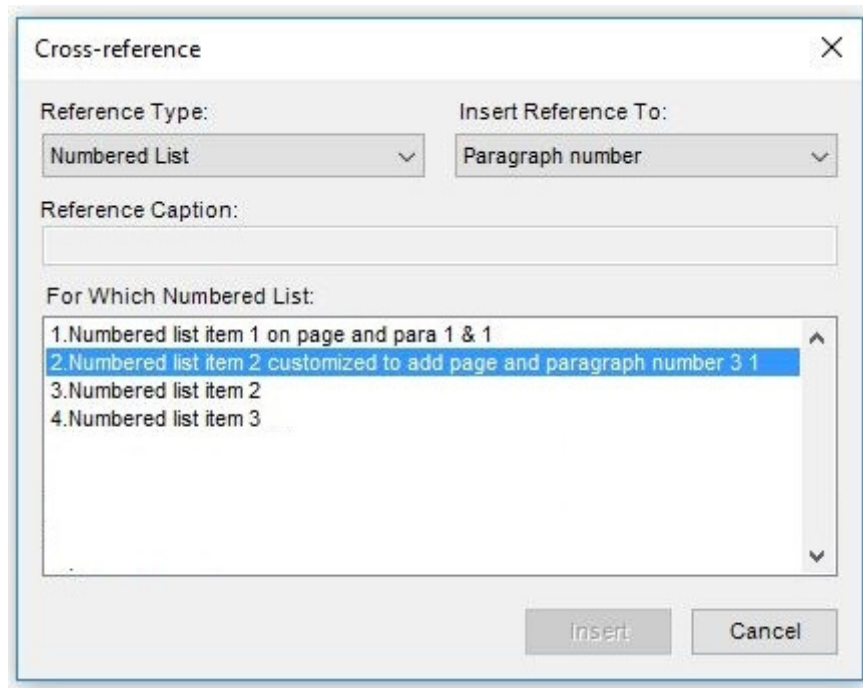
Deleting a cross-reference

Cross-references are easy to delete from the word or phrase to which they were added.

To delete a cross-reference:

1. Right-click on the desired cross-reference.

2. In the context menu, choose **Remove Cross-Reference Emphasis**.

The cross-reference link is removed from the word or phrase.

To delete a cross-reference inserted using the **Cross-reference** dialog:

1 Click at the end of the cross-reference to be deleted.

2 Press the **Backspace** key.

The cross-reference link is removed from the word or phrase.

➡ Cross-references without a valid target are highlighted in red.

Editing cross-reference link text

Editing cross-reference text

To edit the link text inserted using the cross-reference button:

1 Select the interior text of the cross-reference.

2 Type the new text and then remove the first and last characters of the link text,

The cross-reference link text is updated.

Editing cross-reference text using the contextual menu

To edit the link text inserted using the new **Cross-reference** dialog:

1. Select the text to be changed.

2. Right-click and choose **Cross Reference - Edit**.

✂	Cu_t
🖺	_Copy
	_Paste ▶
	Insert Before ▶
	Insert After ▶
	_Select ▶
	_Restart Numbering
	_Continue Numbering
	_Set List Numbering...
👓	Cross-Reference Attributes
	Cross Reference - Edit
	Cross Reference - Update
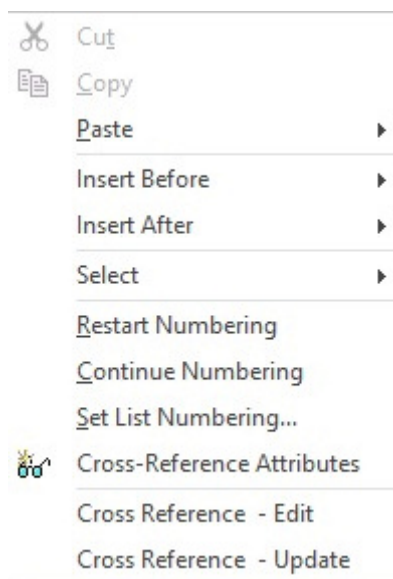
Edit the cross-reference link text.

➡ Editing a cross-reference link text changes the cross-reference link text type to custom. This text can no longer be updated using the **Cross Reference - Update** contextual menu or the Cross-reference button in the Insert Ribbon.

About content references

Quark XML Author supports opportunistic reuse by allowing you to insert references to content that you have already created. References can be made to topic components such as paragraphs, lists, and pictures. Each time the topic that contains the reference is opened or published, the referenced content is accessed and a read-only copy of that content is placed in the referencing topic. In Quark XML Author, the referenced content is displayed with a shaded background to differentiate it from editable native content. This read-only copy also includes a read-only copy of the attributes of the referenced content. The attributes of the content reference itself may not be modified. Each content reference is assigned a unique ID. Any content that you can create in Quark XML Author can be referenced and is therefore reusable, with the exception of inline elements and emphasis.

Reference can be made to earlier versions of content rather than the current or latest version. This is known as pinning a reference to a specific version. Some views display a pin icon adjacent to this type of reference.

You can manually pin an existing reference to the current version of the content. You can also unpin a pinned reference.

Inserting content component references

Content references are inserted on the Word canvas.

This feature applies to referencing content components such as tables, figures, images, lists and paragraphs. To insert sections or documents, see "Inserting section references"

To insert a content reference:

1 Open the source topic that contains the content that you want to reference.

➡ In Quark XML Author, if you have made any changes to the source topic, the topic must be saved to a file before a reference can be created. This action creates IDs for the content elements which allow them to be referenced.

2 In the source topic, locate the desired native content.

3 Right-click on the content.

4 In the context menu, choose **Select**, the desired element, and then click **Copy**.

5 Open the destination topic where you want to insert the content reference.

6 In the destination topic, position the cursor where you want to insert the content reference.

7 Right-click and choose **Paste > Reference {element name}** from the context menu.
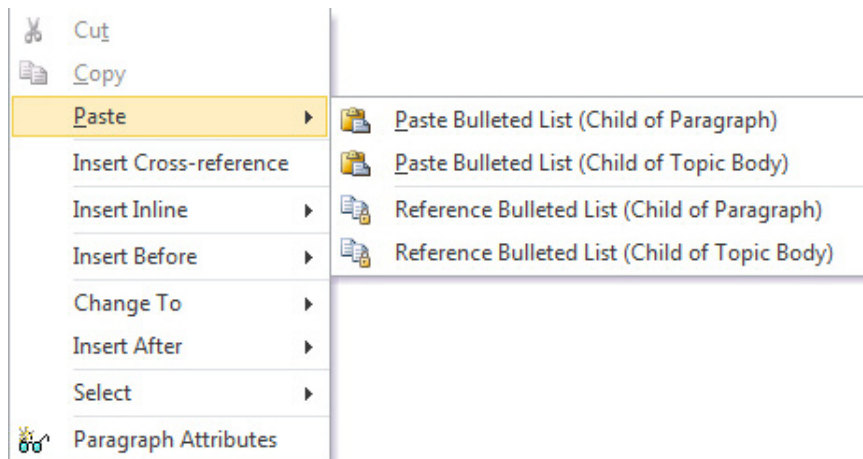
The content reference is inserted. A read-only copy of the referenced content is displayed with a shaded background below the element.

Pinning a content reference to the current version

Content references may be pinned or fixed to the current version of the referenced content element. They may later be unpinned which associates the reference with the latest version of the referenced content element.

To pin a content reference:

1 Right-click on the content reference.

2 In the Context Menu, choose {**element name**} > **Pin Component Reference**.

The content reference is pinned.

Unpinning a reference from a specific version

To unpin a content reference:

1 Right-click on the content reference.

2 In the Context Menu, choose {**element name**} > **Unpin Component Reference**.

The content reference is upinned.

The next time the file is opened for viewing, editing or publishing, the latest version of the content will be displayed. You can also use the Refresh Reference feature to update the Word canvas.

Copying content references

An entire content reference may be copied to a new location in a topic or to a different topic.

To copy a content reference:

1 Open the source topic that contains the content reference that you want to copy.

2 In this topic, locate the desired content reference.

3 Right-click on the content reference.

4 In the context menu, choose **Select**, the desired element, and then **Copy**.

5 Open the destination topic where you want to insert the copied content reference.

6   In the destination topic, place the cursor where you want to insert the conten reference.

7   Right-click and from the context menu, choose the **Paste {element name} Reference** command displayed at the bottom of the menu.

A copy of the content reference and its attributes are pasted at the cursor position. A read-only copy of the referenced content is displayed with a shaded background.

About broken references

A content reference that is not able to connect to its source content is known as a "broken reference". The reference may not be able to connect for a variety of reasons. For example, the source content may have been deleted , or there may have been a change in access or permission to a content library. In Quark XML Author, a broken reference is displayed with a red background. If the Refresh Reference feature does not fix the reference, then you need to confirm that the source content still exists and that you have permission to access it. If you do, then try repairing the broken reference using the Replace Reference feature.

Replacing content references

Content references are replaced on the Word canvas. You can replace an existing content reference with a new reference of the same content type. For example, given a paragraph reference, you may only replace that reference with another paragraph reference. The new reference may be created by copying a paragraph or by copying a paragraph reference. You may then "paste" the new reference over the existing reference that you want to replace. Only one content reference may be replaced at a time.

To replace a content reference with a new reference:

1   Open the source topic that contains the content or content reference that you want to copy.

➡   In Quark XML Author, if you have made any changes to the source topic, the topic must be saved to a file or checked in to a repository before this task may be performed.

2   In this topic, locate the desired content or content reference.

3   Right-click on the content reference.

4   In the context menu, choose **Select**, the desired element, and then **Copy**.

5   Open the destination topic where you want to replace the content reference.

6   In the destination topic, navigate to the content reference that you want to replace.

7   Delete the existing content reference.

8   Insert the new content reference.

Refreshing content references

Content references are refreshed on the Word canvas. This feature attempts to retrieve the source content that is being referenced and refresh the display of that content on the Microsoft Word canvas. Only one content reference may be refreshed at a time.

To refresh a content reference:

1   Open the topic that contains the content reference that you want to refresh.

➡️ In Quark XML Author, if you have made any changes to the source topic, the topic must be saved to a file or checked in to a repository in order for those changes to be reflected in a refresh.

2 In this topic, locate the desired content reference.

3 Right-click on the content reference.

4 In the context menu, choose **Refresh {element name} Reference**.

The content reference is refreshed. The read-only copy of the referenced content is replaced with a new copy of the source content.

Converting a content reference to a local reference

A content reference that references repository content may be converted to a reference that references a new local copy of the same content.

To convert to a local reference:

1 Right-click on the content reference.

2 In the context menu, choose **Select > {element name} > Convert to Local Reference**.

3 Specify the local folder where the content should be downloaded.

The content reference is converted to reference the local content.

➡️ When a topic is checked in, any local references which are configured to be checked in with the main topic will be converted to server references. These references will be checked in first and then will be related/referenced to the topic on the server.

Viewing content references

A view of the content references in the current topic can be displayed.

The view displays:

- A checkmark, if the file containing the referenced content is checked out.

- The filename that contains the referenced content.

- The date/time of last modification of the referenced file.

- The user that last modified the referenced file.

- The current owner of the file, if the file is checked out.

- If a reference is pinned to an earlier (specific) version of the content, the list displays a push pin.

Content References are viewed in the **References** tab of the **Smart Document Pane**.

To show/hide the **Smart Document Pane**, in either the **Home** ribbon or the **View**

ribbon, click **Smart Document Pane**.

Click the **References** tab.

The list of content references for the current document are displayed.

A plus sign indicates that the reference contains a hierarchy of content. Click the plus sign to expand the list.

The **Name** column displays "Missing reference" when a reused/referenced content cannot be found.

If you have changed the content and you want to update the view, click **Refresh.**

Viewing referenced content

The source content of a reference may be viewed from the link on the Word canvas.

To view referenced content:

1 Right-click on the content reference.

2 In the context menu, choose **Select > {element name} > Open as Read Only**.

 The topic containing the source content is opened in a separate topic window. The content is ready for viewing.

Editing referenced content

The source content of a reference may be edited from the link on the Word canvas.

To edit referenced content:

1 Right-click on the content reference.

2 In the context menu, choose **Select > {element name} > Edit Component**.

 The topic containing the source content is opened in a separate topic window. The content is ready for editing.

Scrolling to referenced content

You can scroll the Word canvas to display the referenced content associated with a reference in the **References** tab of the **Smart Document Pane**.
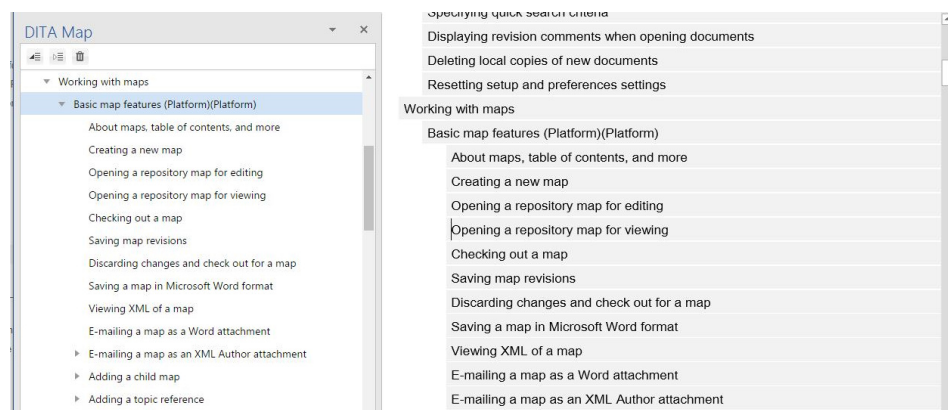
To scroll:

1 Double-click or right-click on the content reference.

2 In the context menu, choose **Go To**.

The Word canvas scrolls to display the referenced content associated with the selected reference.

The DITA Navigation pane

The **Navigation** pane enhances the usability of DITA maps by allowing the map to be viewed as a document outline.

The Navigation pane in Quark XML Author

The **Navigation** pane also provides the capability to reorganize the structure of a DITA map by providing a visual interface to promote, demote or delete topics as needed.


The **Navigation** pane can be opened and closed by clicking the **Navigation Pane** button in the **Home** ribbon. You can also close the pane by clicking the close icon in the title bar of the **Navigation** pane. The pane can be resized or moved as per need. The **Navigation** pane docks to the left by default.

➡ The **Navigation Pane**, the **Smart Document pane** and other panes can be opened simultaneously.

The Navigation Pane menu bar

The list of topics in the DITA map can be expanded, collapsed and deleted using the buttons in the menu bar of the **Navigation** pane.
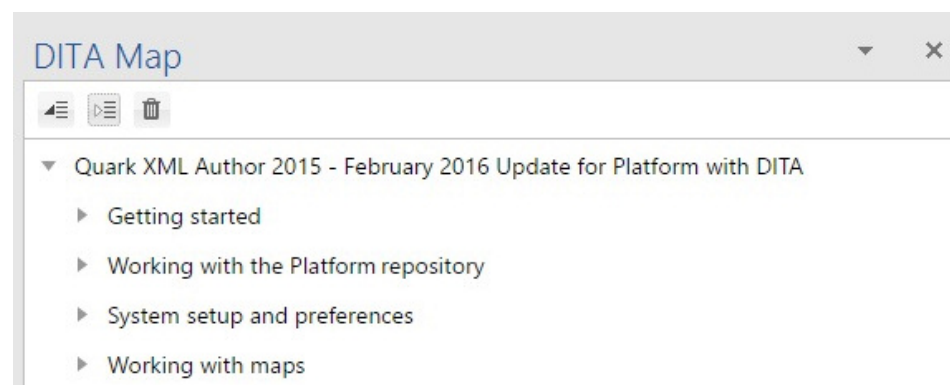
Expanded view of topics in the DITA map.
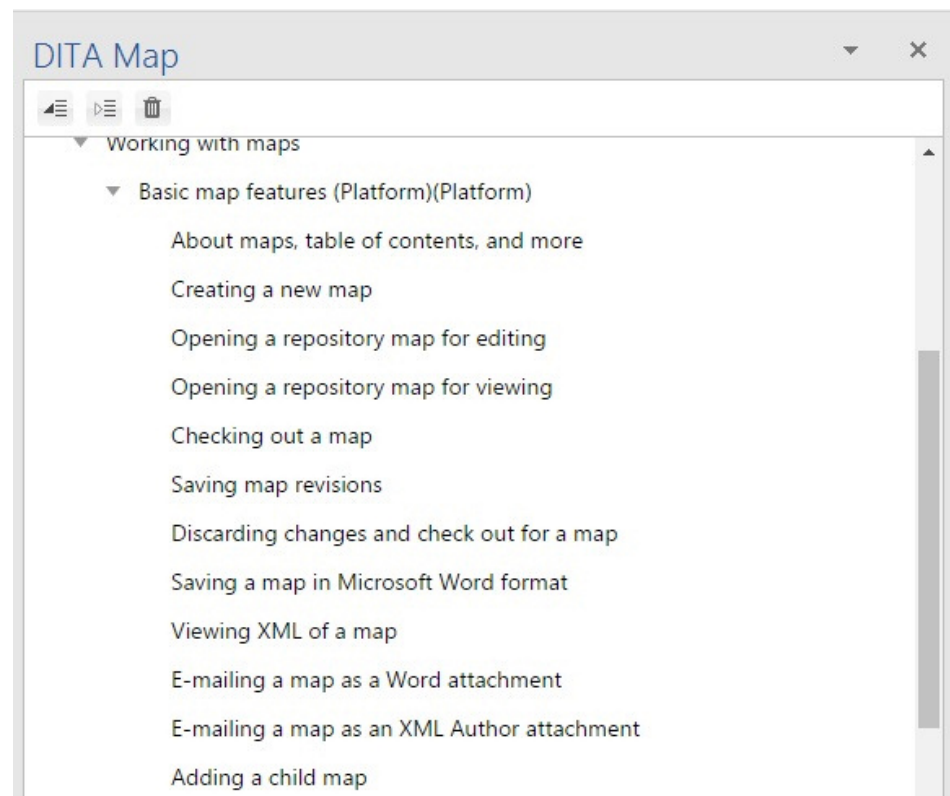
To view all the available topics, click the ▣ button.

To collapse the view, click the ▣ button.
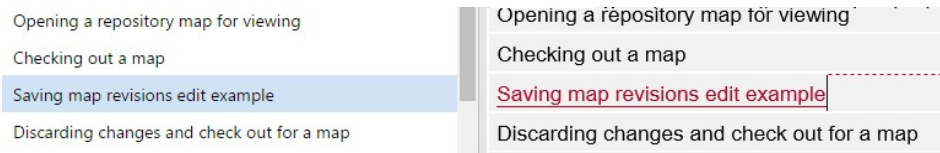
Collapsed view of topics in the DITA map.

Topics that are no longer required can be deleted using the 🗑 button.

Any changes made to the DITA map are immediately reflected in the **Navigation** pane.

Opening a repository map for viewing	Opening a repository map for viewing
Checking out a map	Checking out a map
Saving map revisions edit example	Saving map revisions edit example
Discarding changes and check out for a map	Discarding changes and check out for a map

For example, if the name of a topic has been changed, the changes will be reflected in the **Navigation** pane immediately.

Creating a new DITA map

You can create DITA maps directly in Quark XML Author.

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

1 Choose **File > New XML Author**.

2 From the **XML Author Templates** menu, choose **Map**.

3 Replace the default map title text with the desired title for the map.

The map is created and ready for authoring.

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

Adding a topic reference

You can insert a topic reference to a map on the Microsoft Word canvas.

The map must be checked out.
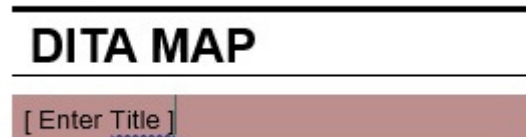
To insert a topic reference:

1   In the map, position the cursor where you want to insert the topic reference.

2 Use one of the following methods:

- In the **Home** ribbon > **Styles** tool, select the desired **Topic Reference**. The Choose Reference dialog displays. Browse to the topic reference on the server or from your local machine. Enter a navigation title or click **Insert** to insert the topic reference.

- To insert a topic reference placeholder, just click the **Insert** button in the **Choose Reference** dialog without selecting a topic. Inserted placeholders can also be checked in to the Platform server. Invoke the context menu and choose **Select >Topic Reference > Create Topic Reference.**

- Right-click and choose **Insert After >Topic Reference** from the context menu. The **Choose Reference** dialog displays. Browse to the topic reference on the server or from your local machine. Enter a navigation title or click **Insert** to insert the topic reference.

- If a style/element is not allowed at the current cursor position, will not be available in the **Styles** tool or the context menu.

A topic reference is inserted.

➡ To convert a topic reference type from local to server, right-click on the topic reference and choose **Select >Topic Reference> Create Topic Reference.** Save the topic to the server by browsing to the desired repository location in the **Save** dialog.

When a placeholder is inserted, the topic reference displays a pink background to indicate it is incomplete.

You can assign a topic reference to the placeholder using the following steps:

3 Right-click on the incomplete topic reference.

4 In the context menu, choose **Select > Topic Reference-Assign Topic Reference** from the **Select** menu.

5 In the **Choose Reference** dialog box, navigate to the local drive or the repository folder that contains the desired topic or, in the **Reference from Server** dialog box, use the search feature to locate the desired map.

- To use the Quick Search feature, type a search term in the box in the upper right corner of the Reference from Server dialog box.

- To use an existing search, select the desired search from the list of saved and shared searches in the Searches folder.

The search results are displayed.

➡ You can choose to view the results in either list view or snippet view.

6 Select the topic.

7 Click **OK**.

The completed topic reference is inserted into the map.
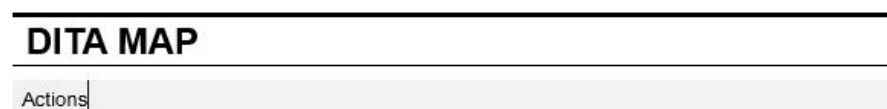
Adding a navigation title to a topic reference

You can add a navigation title to a topic reference in a map. The alternative is to display the topic title as the topic reference title.

To add a navigation title:

1 Right-click on the topic reference.

2 From the context menu, choose **Select > Topic Reference# > Attributes**.

3 In the **Attributes Panel**, click the **Navigation** tab

4 In the **Navigation** tab, specify the **Navigation Title**.

5 Click **OK**.

The topic reference title is updated on the Microsoft Word canvas.

Editing the structure of a DITA map

The structure of a DITA map can easily be altered using the **Navigation pane**. Topics and sub-topics can be promoted and demoted as needed. The **Navigation** pane offers an intuitive, visual interface that allows the structure to be changed easily.

Selecting a topic in the **Navigation Pane** highlights that topic in the DITA map.
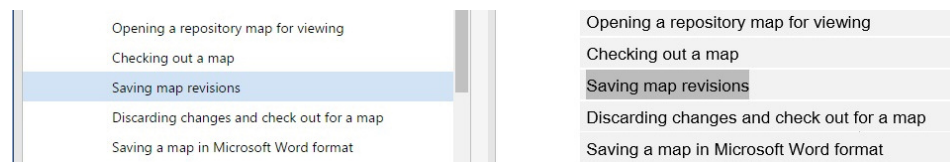
Topics can be promoted (moved above), demoted (moved below), made a child or made a sibling of another topic. The placement of the selected topic is guided by visual indicators in the **Navigation Pane**.
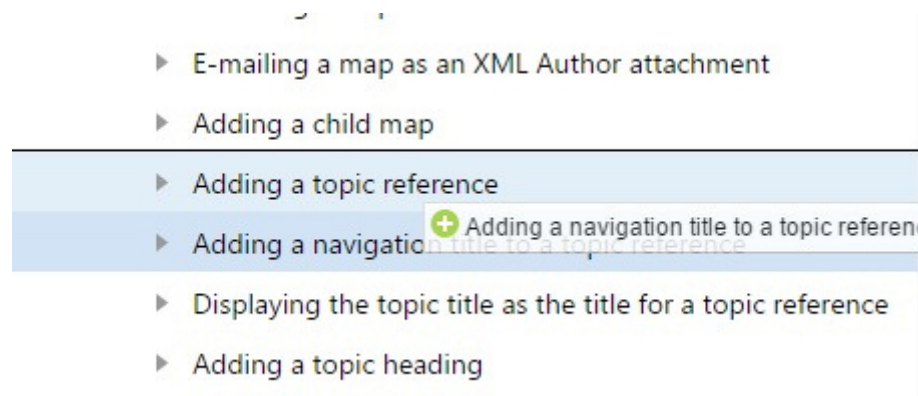
**Moving a topic from its current position.**

To move a topic above or below its current position:

1. Select the desired topic and then drag and hover above or below the desired topic insertion location. A ⊕ sign along with a black line that indicates the insertion position of the topic displays.

2. Release the mouse button to insert the topic.

➡ The topic is inserted at the desired location.

➡ To make a topic the child of another topic, select, drag and hover over the destination topic until only the ⊕ sign displays. Drop the topic here to create a child entry. Dropping a topic between two topics creates a sibling entry.

➡ Invalid topic insertion locations are indicated with the ⊘ sign.

Deleting a topic from a DITA map:

Topics can be deleted from the DITA map by clicking the 🗑 button in the **Navigation Pane**, by pressing the **Delete** or **Backspace** keys on the keyboard or by deleting the entry in the DITA map. Attempting to delete a DITA map entry that contains subtopics displays a warning.
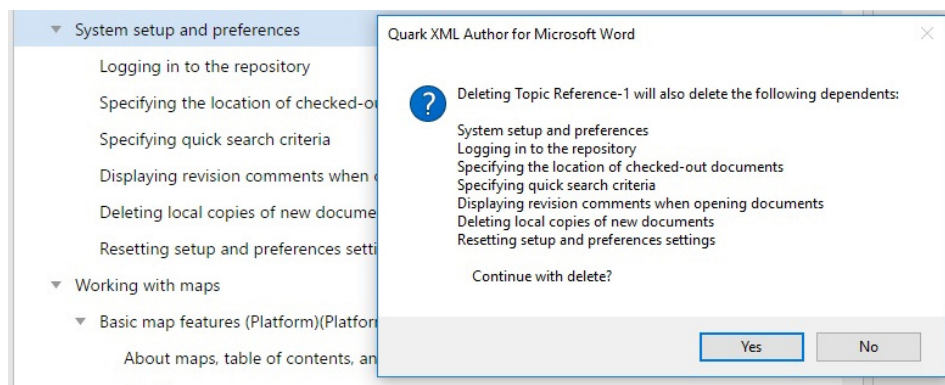
Clicking **Yes** will delete the topic along with its subtopics. Clicking **No** will cancel the delete operation.

The Smart Document Pane

The **Smart Document Pane** is located to the right of the editing pane and contains the **References**, **Where used** and **Preview** tabs.

To show/hide the **Smart Document Pane**, in either the **Home** ribbon or the **View** ribbon, click **Smart Document Pane**.

The References and Where Used tabs

The **References** and **Where Used** tabs allow you to view the relationships (including primary and secondary references, if any) for the selected asset. The current topic refers to assets (images and components). These are primary, or first-level references. These referred to assets may refer to other assets. These are secondary, or second-level references.

References tab

The **References** tab displays all local and server content references contained in the current .

Where Used tab

The **Where Used** tab displays all assets that refer to the selected asset.

Preview tab

The **Preview** tab allows you to preview the publication in any of the available publishing channel formats.

➡ You can publish maps and topics from the **Preview** tab. See "Publish the preview".

About authoring in Microsoft Word

Quark XML Author has been designed to let you create XML-based structured content from within Microsoft Word in a natural authoring experience. The Quark XML Author plug-in turns Microsoft Word into an XML word processor.

Structured authoring is slightly different from standard word processing. The document must conform to the structure specified by the rules or definition of the underlying XML schema. The goal of Quark XML Author is to shield the author from the complexity of the underlying XML schema as much as possible. Quark XML Author does not display XML tags. Quark XML Author protects the author from creating an invalid XML document. It does this through the user experience and by preventing the user from using Microsoft Word features that are not applicable to an XML document.

Certain Microsoft Word features are unavailable. Others are available, but perform slightly different than standard (for example, Spell Checker).

At a given location in your document, Quark XML Author only lets you insert content types (elements) allowed at that location. This is one example of how the user experience protects the author from taking an action that would negatively affect the structural integrity of the document.

The Undo and Redo features within an XML Author session operate similar to Undo and Redo within a standard Word authoring session. For every Undo action that is supported in Quark XML Author, Redo is also supported. The Repeat Last Action feature is not supported. In Word, Repeat is integrated with the Redo feature.

About Microsoft Word views

Supported views

The following Microsoft Word views are supported by Quark XML Author:

- Draft

- Print Layout

Unsupported views

The following Microsoft Word views are not supported by Quark XML Author:

- Web Layout

- Outline View

- Full Screen Reading

Unavailable Microsoft Word features

This section lists Microsoft Word features that are not available during a Quark XML Author session. This list is not comprehensive, but it highlights the features more commonly used in word processing that are not available or not applicable to XML word processing.

Macro Recording

This feature is not available.

Grammar Checker

This feature is not available.

Select Browse Object

This button provides access to several Microsoft Word features such as **Find** and **Go To**. However, when accessed via this button, these features are not supported by Quark XML Author. To use these features within Quark XML Author, use the menu bar, toolbar, or shortcut keys.
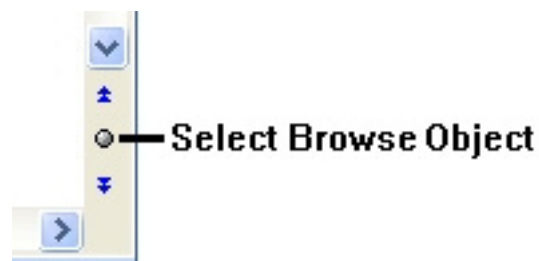
Tools

The following tools are not supported:

- The *Quick Access Toolbar*.

- The **Word Count dialog – Show Toolbar** feature.

- The **Page Setup** feature.

Ruler

This feature is not available.

Navigation Pane

This feature is not available in Quark XML Author.

Document Map

This feature is not available in Quark XML Author.

Thumbnail View

This feature is not available in Quark XML Author.

Reply to Comments and Mark Comments Done

This feature is not available in Quark XML Author.

Collapse / Expand Outline Styles

This feature is not available in Quark XML Author.

Live Layout and Alignment Guides

This feature is not available in Quark XML Author.

Word 2013 Design tab

This feature is not available in Quark XML Author.

Reviewing Pane

This feature is not available in Quark XML Author.

Available Word features

This section lists some of the Microsoft Word 2013 features that are supported by Quark XML Author. This list is not comprehensive, but it highlights the features more commonly used in word processing.

Insert Table Rows and Table Columns hover button

This feature is supported in Quark XML Author.

Backstage View

This feature is supported in Quark XML Author.

Cell Border Dragging

This feature is supported in Quark XML Author.

Smart Paste

This feature is supported in Quark XML Author.

Track Changes for Multiple Users

This feature is supported in Quark XML Author.

Display for Review

This feature is supported in Quark XML Author.

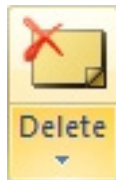## About comments

Quark XML Author supports the Microsoft Word Comments feature and acts the same way, with one exception. Quark XML Author does not allow comments on read-only elements such as element labels. You may only place comments on editable text. The following commands are provided as separate toolbar buttons.

Differences

There is a small difference between the Microsoft Word and Quark XML Author Review feature set. The Delete comment drop-down tool list has been modified to exclude the **Delete All Comments Shown** command.
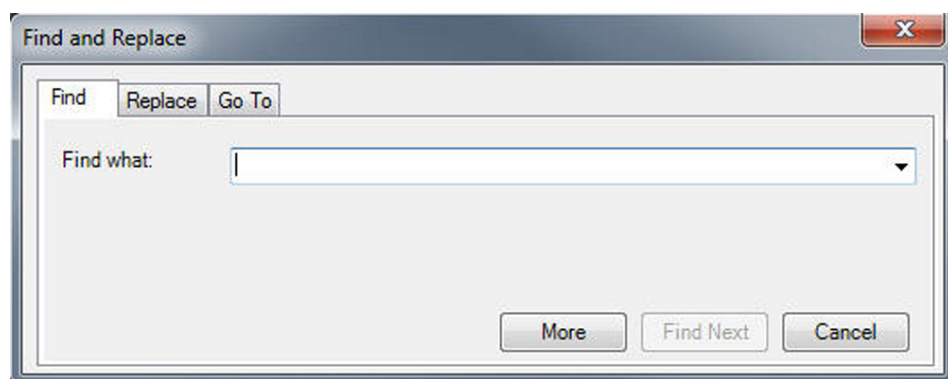
About find and replace

Quark XML Author supports Microsoft Word's Find and Replace feature and acts the same way, with one exception. Quark XML Author's Replace feature does not modify read-only elements such as element labels or content that is displayed as part of a content reference.

You may only modify text via **Replace** if the text is editable.

The **Find and Replace** dialog does not allow you to specify stylistic information, as your XML content does not contain any that type of information.

About printing

Quark XML Author supports Microsoft Word's Print feature with a few exceptions. These exceptions exist in Word 2010 and Word 2013.

Differences in Word 2010 and Word 2013

Quark XML Author's Page Setup feature is used to specify page orientation and layout settings specific to XML Author documents. Word's Orientation and Page Setup features are not XML aware and therefore should not be used.

About spelling checker

Quark XML Author supports Microsoft Word's Spelling feature and acts the same way, with one exception. Quark XML Author does not spell check or modify read-only elements such as element labels or content that is displayed as part of a content reference. You may only modify text via spell check if the text is editable.

On the Microsoft Word canvas, any text that is deemed misspelled displays the red wavy underline even if it is read-only.

The **Review** ribbon > **Spelling** button:
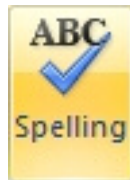
The **Spelling** dialog only displays misspelled words found within editable text, since read-only text may not be changed.
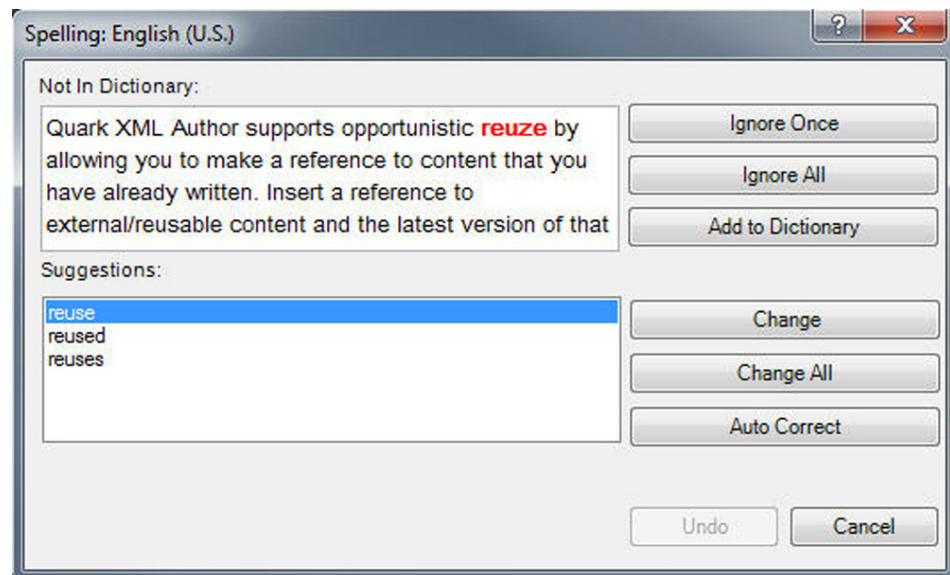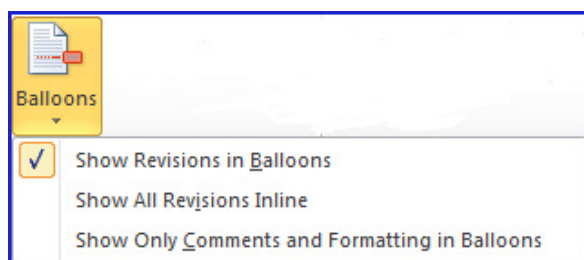

About track changes

Quark XML Author supports Microsoft Word's **Track Changes** feature. Changes made to editable text are tracked. However, structural changes and element-level changes are not tracked, with a few exceptions.

The user experience for track changes of text is the standard Microsoft Word experience. For example, inserted text is displayed in a new color. Deleted text is displayed with strike-through or in a deleted balloon.

➡ Choose whether to display revisions in balloons or inline using the **Balloons** drop-down menu in the **Tracking** section of the **Review** ribbon.

Accept/Reject change commands are available for each change. You may only track changes on editable text. Quark XML Author does not allow track changes on read-only elements such as element labels.

Insert, modify and delete for elements are tracked, but the visual indicators for these action varies with each element. Some elements have structural indicators. Some

elements are not text-based or have no text-based child elements. Because changes to text are the main visual indicator for change in Microsoft Word they are also the main visual indicator in Quark XML Author. Also, when content containing tracked changes is copied and pasted, tracked deletions are filtered out and not pasted.
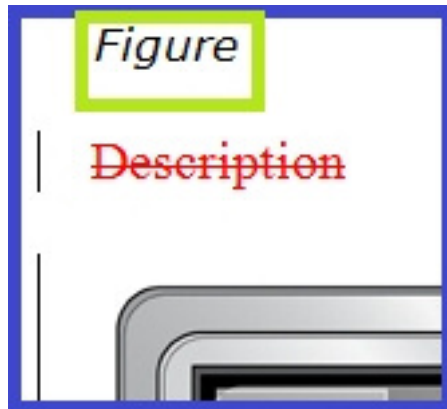
The Figure structural indicator displays no visual indicator.

The picture element displays an indicators for delete.

Within tables, changes to text are tracked, but structural changes are not. For example, the following are not tracked: delete table, delete row, delete column, insert row, split cell and merge cells.

For Word Tables, the **Track Changes** feature supports the tracking of inserted and deleted Word Tables within a Quark XML Author document.

Differences

There are a couple of small differences between the Microsoft Word and Quark XML Author Review feature set:

- The **Accept** drop-down tool list has been modified to exclude the **Accept and Move to Next** and **Accept All Changes Shown** commands.
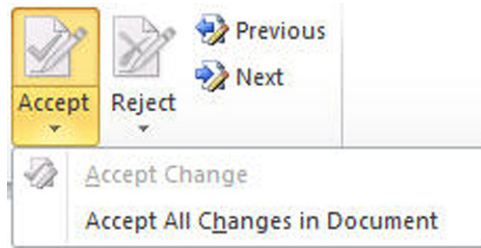
- The **Reject** drop-down tool list has been modified to exclude the **Reject and Move to Next** and **Reject All Changes Shown** commands.
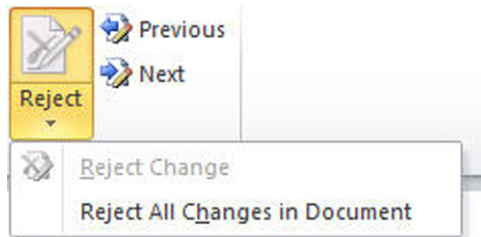
Previewing publications

A preview of a publication can be displayed for any of the available publishing channel formats.

Previews are displayed in the **Preview** tab of the **Smart Document** pane. See "The Smart Document Pane".

To preview a publication:

1 In the **Smart Document** pane, click the **Preview** tab.

2 From the drop down menu, choose the desired output format.

- Image

- PDF

The current document is displayed in the **Preview** tab in the selected publishing channel format.

➡ The default preview channel type is Responsive HTML5.

➡ If you have changed the content and you want to update the preview, click **Refresh**.

➡ You can publish individual documents from the **Preview** tab. See "Publish the preview".

About publishing

You can publish individual maps and topics from Quark XML Author. The map or topic must already be open in Quark XML Author.

The Publishing feature can output the following formats:

- High fidelity PDF

- Structured HTML

➡ Creates a ZIP file of the content as HTML files and image files. These files can be viewed in a browser offline.
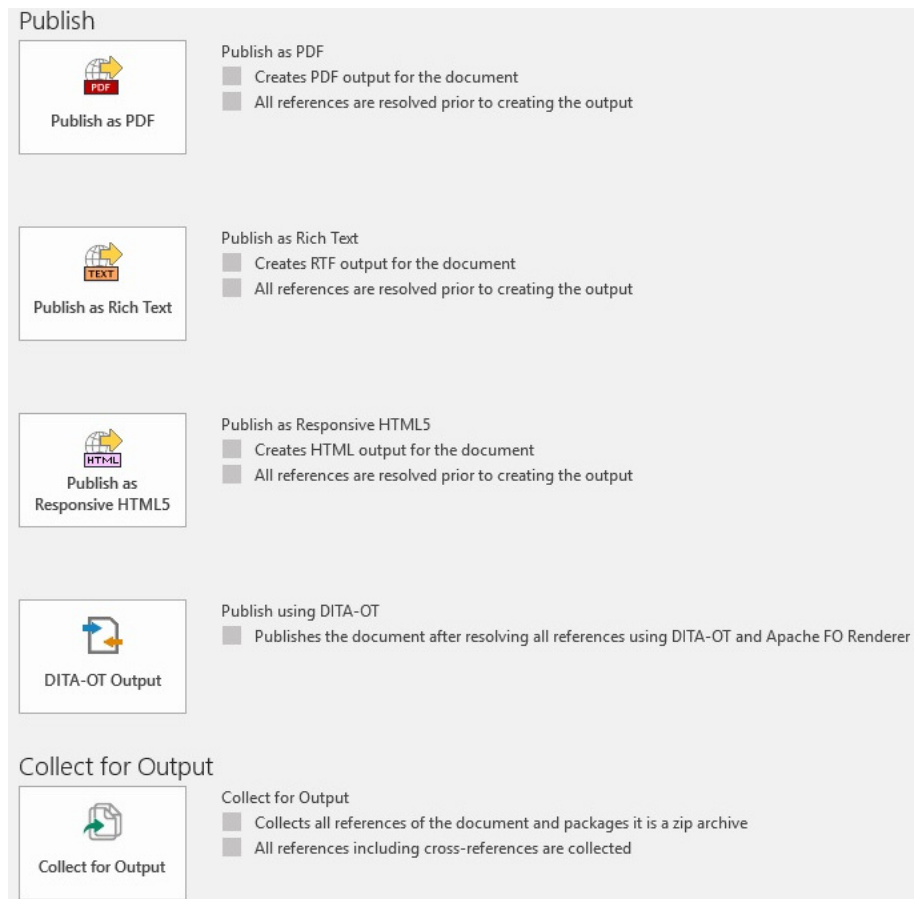
- Rich Text Format

➡ Asset metadata can be configured to be shown in the live preview.

Publish a document

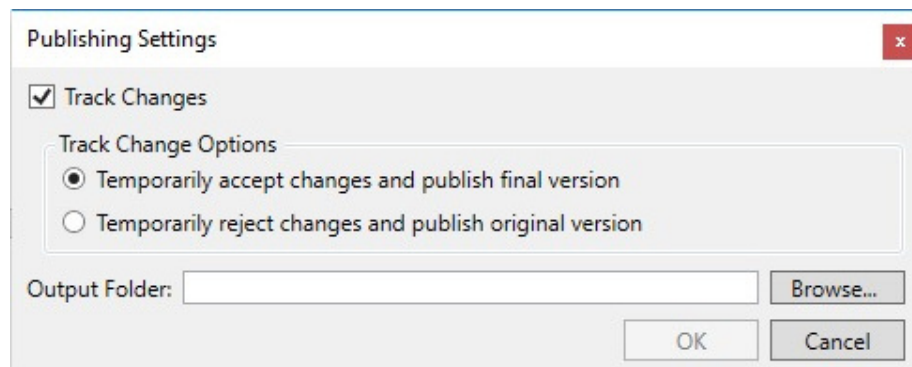To publish a map or topic:

1 Click **File > Save & Send > Publish**.

2 From the **Publish** menu, choose one of the available formats:

- **Publish as PDF -** Creates a PDF of the entire document. All server references are resolved prior to publishing.

- **Publish as Rich Text -** Creates a RTF output of the document. All server references are resolved prior to publishing.

- **Publish as Responsive HTML5 -** Creates HTML5 output of the document. All server references are resolved prior to publishing.

- **Publish using DITA-OT -** Publishes the document using DT-OT and Apache FO renderer. All server references are resolved prior to publishing

- **Collect for Output -** Creates a zip archive of all references of the document. All server references including cross-references are collected.

3 Select whether all tracked changes should be accepted or rejected in the published content.

➡ Source content is not
affected.

4 In the **Publish As** dialog box, navigate to the location where you want to save the file.

5 Specify the desired **File name**.

6 Click **Save**.

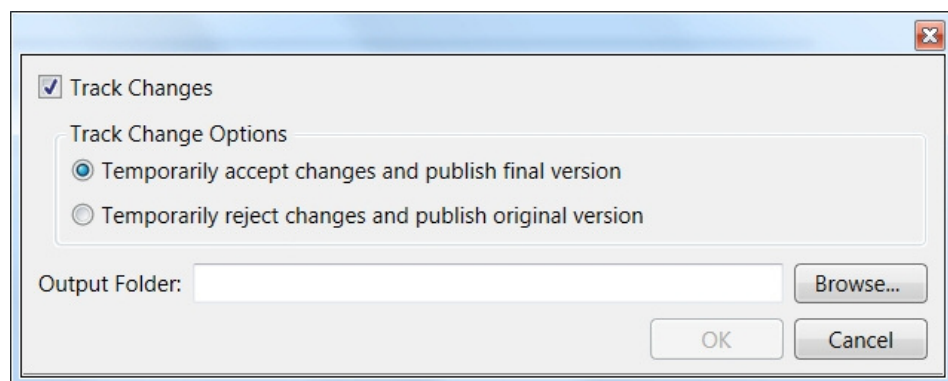The map or topic is published in the selected format to the specified folder.

Publish the preview

You can publish maps and topics from the **Preview** tab.

To publish a map or topic:

1 In the **Preview** tab, click the **Publish** button adjacent to the Channel selection.

2 Select whether all tracked changes should be accepted or rejected in the published content.

➡ Source content is not affected.

3 In the **Publish As** dialog box, navigate to the location where you want to save the file.

4 Specify the desired **File name**.

The map or topic is published in the selected format to the specified folder.

➡ Your user privilege settings will affect the user flows for live preview and publishing.

➡ The visibility of tracked content is governed using Server XSLs.

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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