



Quark XML Author for SharePoint 2.7 with BusDocs Guide

Contents

Getting started	1
About Quark XML Author	1
System setup and preferences	3
Logging in to the repository	3
Specifying the location of checked-out documents	4
Deleting local copies of new documents	5
Resetting setup and preferences settings	6
Working with the SharePoint repository	8
Creating a new document from a repository template	8
Opening a repository document for editing	9
Opening a repository document for viewing	10
Checking out a document	11
Saving document revisions	12
Discarding changes and check out	13
Working with documents	15
Basic document features (SharePoint)	15
What is a business document	15
Authoring a business document	16
Saving in Microsoft Word format	21
Viewing XML	21
E-mailing as an XML Author attachment	21
E-mailing as a Word attachment	22
Elements	22
About insertion points	22
Inserting elements	22
Copying elements	25
Moving elements	27
Deleting elements	28
Cutting, copying, and pasting multiple elements - overview	29
Cutting, copying, and pasting multiple elements - details	30
Entering text	30
Cutting, copying and pasting text	30
Entering / pasting text into a selection	31

Using placeholders	31
Math equations	32
Inserting math equations	32
Editing math equations	34
Working with tables	36
Inserting tables	36
Structured tables	37
Simple tables	37
Word tables	37
Authoring in tables	39
Copying, cutting and pasting table elements.....	42
Creating tables using copied content.....	46
Working with pictures.....	47
Inserting pictures - newline	47
Inserting pictures - inline	49
Refreshing picture references	49
Inserting audio from the repository.....	50
Inserting video from the repository.....	51
Working with lists	52
Setting list numbering	53
Restarting list numbering	54
Continuing list numbering	55
Indenting list items	56
Decreasing indent of list items.....	57
About character formatting	58
Formatting text	58
Removing text formatting.....	59
Applying font color.....	59
Removing font color	59
Applying text highlight color	60
Removing text highlight color.....	60
About changing styles	60
Rules for changing styles.....	60
Changing styles	61
Changing the style of a list.....	61
Changing the style of list items.....	62
Changing paragraphs to a list	64
Inserting hyperlinks	65
Inserting symbols.....	67
Working with notes.....	67
About footnotes	67
About endnotes.....	69
About table notes.....	71
Assigning a starting number to a note	72

Assigning a custom mark or citation to a note	73
Going to a reference from a note	74
Deleting a note.....	75
About cross-references	75
Inserting a cross-reference	75
Using a cross-reference	79
Deleting a cross-reference	79
Editing cross-reference link text	79
About cross-references and embedded Word documents	80
Working with page layout.....	83
About pagination	83
Inserting page breaks	83
Deleting page breaks.....	83
Setting page orientation.....	84
About document-sections	85
Inserting document-section breaks.....	85
Deleting document-section breaks	86
Setting document-section orientation	86
About keep with next.....	87
Using the keep with next setting	87
About widow/orphan.....	88
Using the widow/orphan setting.....	88
About columns	88
Inserting columns	88
Modifying columns	89
Inserting column breaks	90
Deleting column breaks.....	90
Working with inline elements and emphasis	91
About inline elements/emphasis.....	91
Applying emphasis.....	91
Removing emphasis	92
Working with attributes	93
Adding document attributes.....	93
Adding content element attributes	93
Adding content element attributes in Word tables	94
Working with content references.....	95
About content references	95
Inserting content references.....	95
Content component references and the FileNet repository	96
About section references.....	97
Inserting section references	97

Copying content references.....	97
About broken references	98
Replacing content references	98
Refreshing content references	99
Converting a content reference to a local reference	99
Scrolling to referenced content	99
Viewing referenced content	100
Editing referenced content	100
Editing referenced sections inline	100
Saving edited content references	100
Viewing content references	101
Quark XML Author for SharePoint BHO feature.....	102
Make changes to config file	102
Associate Quark XML Author document file extension.....	103
Configure Internet Explorer.....	103
Configure the SharePoint server.....	104
Working with the BHO feature	104
The Smart Document Pane	107
The References tab	107
References tab.....	107
Preview tab.....	107
About authoring in Microsoft Word	109
About Microsoft Word views	109
Unavailable Microsoft Word features	110
Available Word features.....	111
About comments.....	111
About find and replace	112
About printing	112
About spelling checker	112
About track changes	113
Viewing the Revisions pane.....	115
Previewing publications	117
About publishing	118
Publish a document.....	118
Publish the preview	119
Contacting Quark.....	121
In the Americas	121
Outside the Americas	121
Legal notices	122

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.

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 modifiable when a server connection is currently established. In that case, close all open documents and then try again.

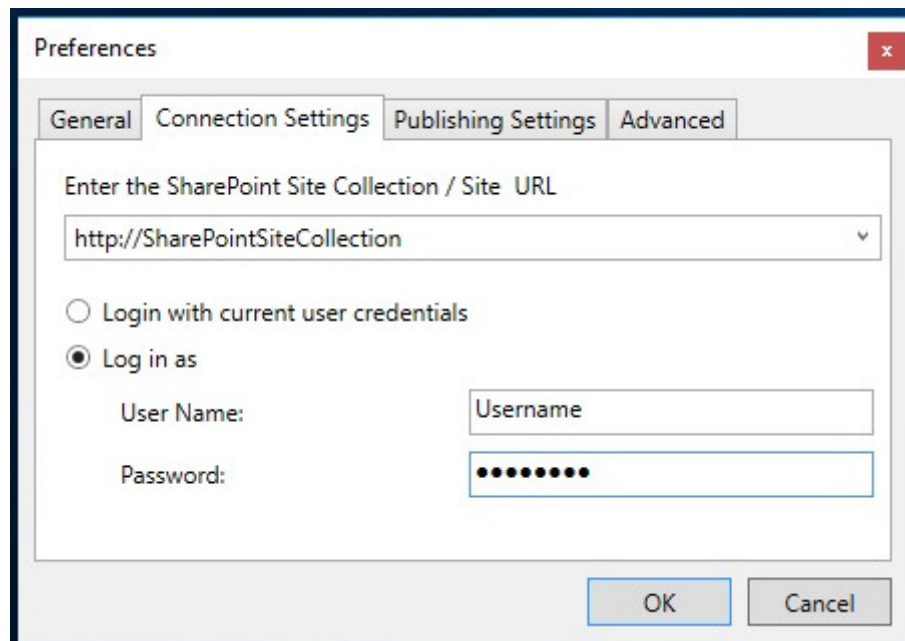
Logging in to the repository

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

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

To specify login information:

- 1 Choose **File > Preferences**.
- 2 Click the **Connection Settings** tab.

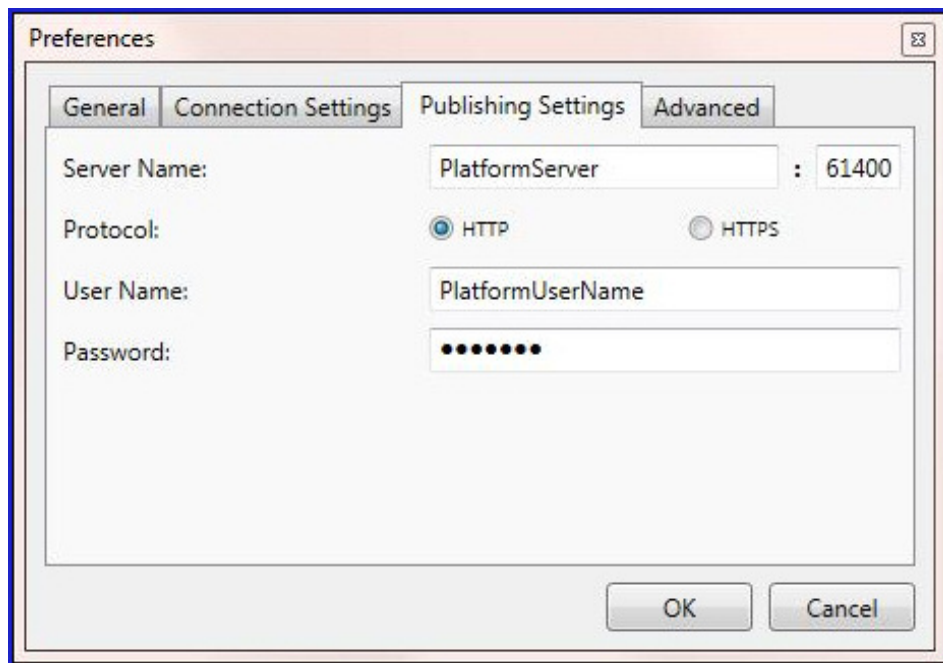


The screenshot shows the 'Preferences' dialog box with the 'Connection Settings' tab selected. The dialog has four tabs: 'General', 'Connection Settings', 'Publishing Settings', and 'Advanced'. The 'Connection Settings' tab contains a text box labeled 'Enter the SharePoint Site Collection / Site URL' with the value 'http://SharePointSiteCollection'. Below this are two radio buttons: 'Login with current user credentials' (unselected) and 'Log in as' (selected). Under 'Log in as', there are two text boxes: 'User Name' with the value 'Username' and 'Password' with masked characters (dots). At the bottom right are 'OK' and 'Cancel' buttons.

- ➔ Connections using both Sharepoint Site Collection URLs and SharePoint Site URLs are now supported.
- 3 Specify the repository login information provided by your system administrator.

SYSTEM SETUP AND PREFERENCES

- ➔ If you do not specify login information, then the credentials of the user that is logged on to the machine are used.
- 4 In the **Publishing Settings** tab, specify the publishing system login information provided by your system administrator.



- 5 Click **OK**.

Your login information is set.

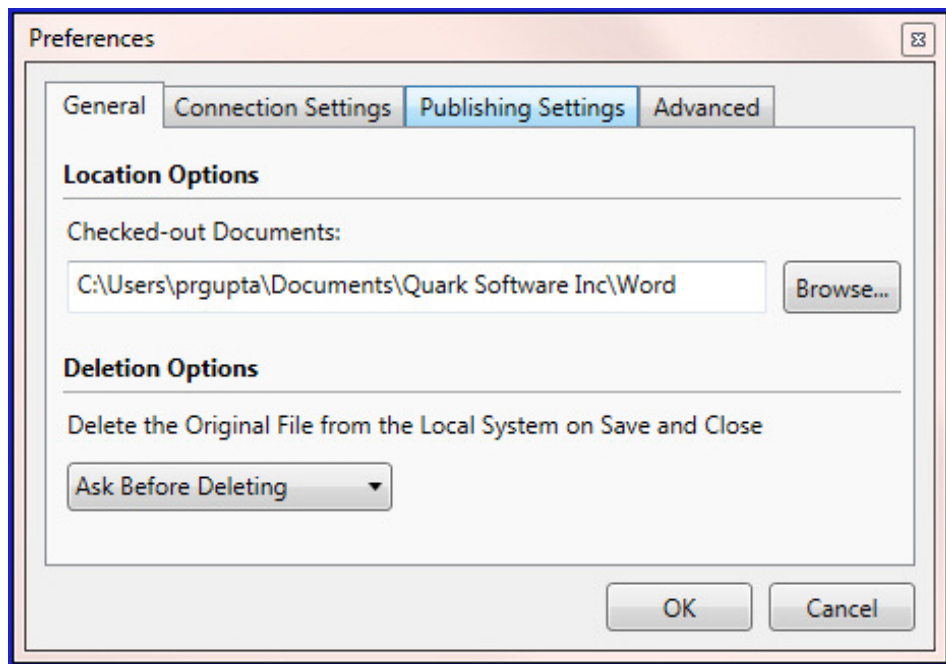
- ➔ Changes made in preferences will be reflected when you click OK. If a document is currently open, you will be unable to change preferences. In this case, close all open documents and try again.

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**.

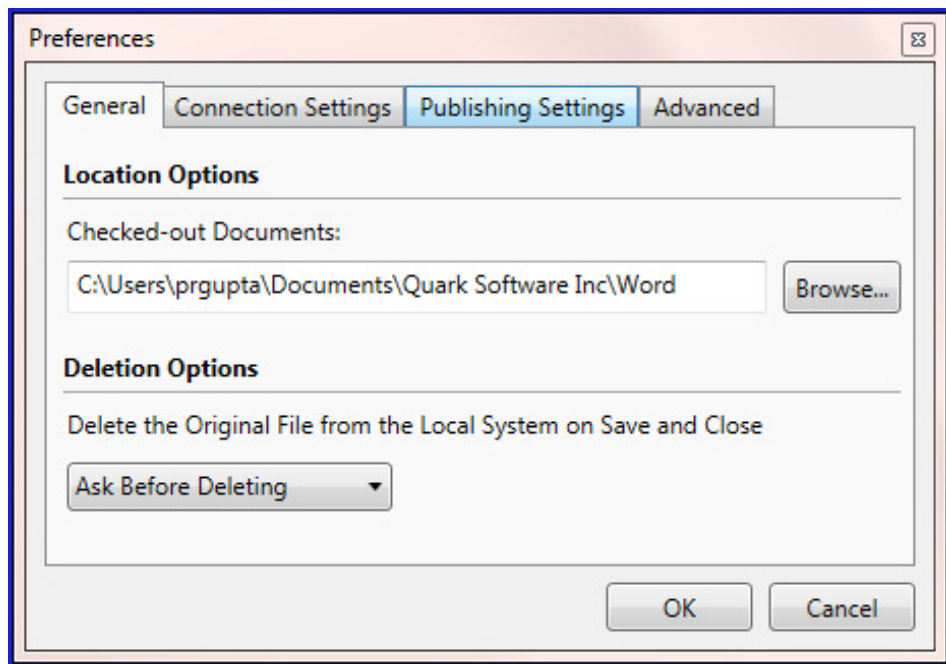
The location for checked-out documents is set.

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**.

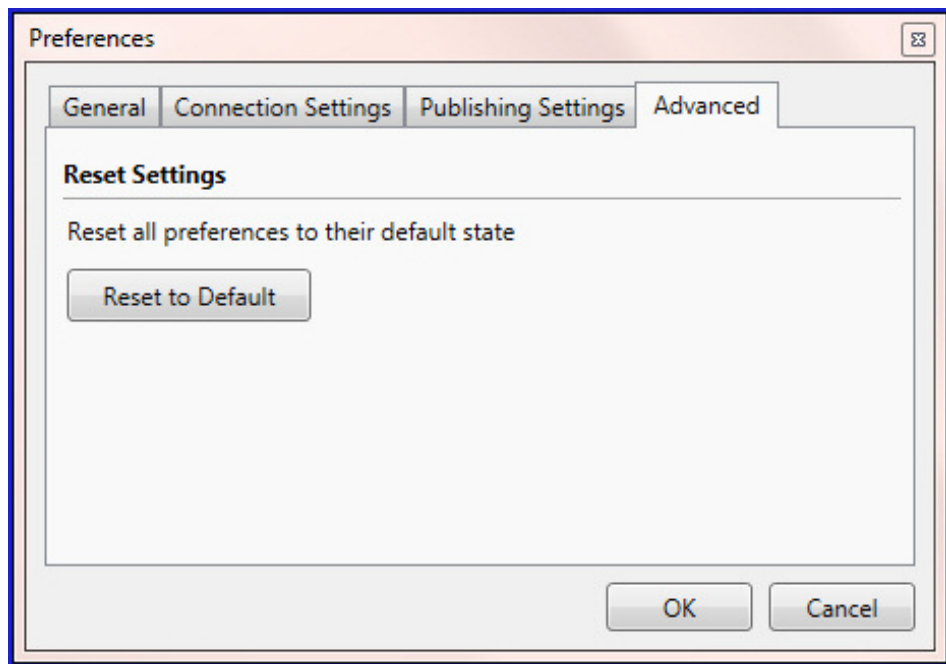
The selected setting is stored.

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 the SharePoint repository

Creating a new document from a repository template

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

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


To create a new document:

- 1 Choose **File > New XML Author**.
- 2 In the **XML Author** menu, choose **New Business Document from Server Template**.

The **Select Template** dialog displays.

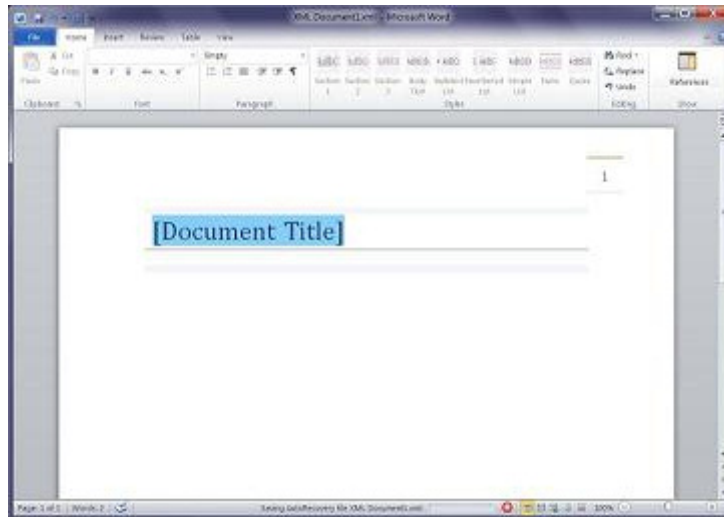
- 3 Navigate to the repository folder that contains the desired template.
- 4 Or, in the dialog box, use the search feature to locate the desired document.
 - To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

The search result displays.

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

- 5 Select the template.
- 6 Click **OK**.

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



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



Opening a repository document for editing

You can open repository documents from Quark XML Author.

To open a document 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 document.
- 3 Or, in the dialog box, use the search feature to locate the desired document.
 - To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

The search result displays.

- ➔ You can choose to view the assets in either  list view or  snippet view.
- 4 Select the document.
- 5 To open an earlier (specific) version of a document, 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 document displays in Quark XML Author, ready for editing.

Analysis Report	
1	Front Page
1.1	Event
1.2	Analysis
1.3	Valuation
2	Possible Scenarios
3	Valuation
4	Appendix

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 document for viewing

You can open repository documents from Quark XML Author.

To open a document for viewing:

- 1 Choose **File > Open from Server**.
- 2 In the **Open from Server** dialog box, navigate to the repository folder that contains the desired document.
- 3 Or, in the dialog box, use the search feature to locate the desired document.
 - To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

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

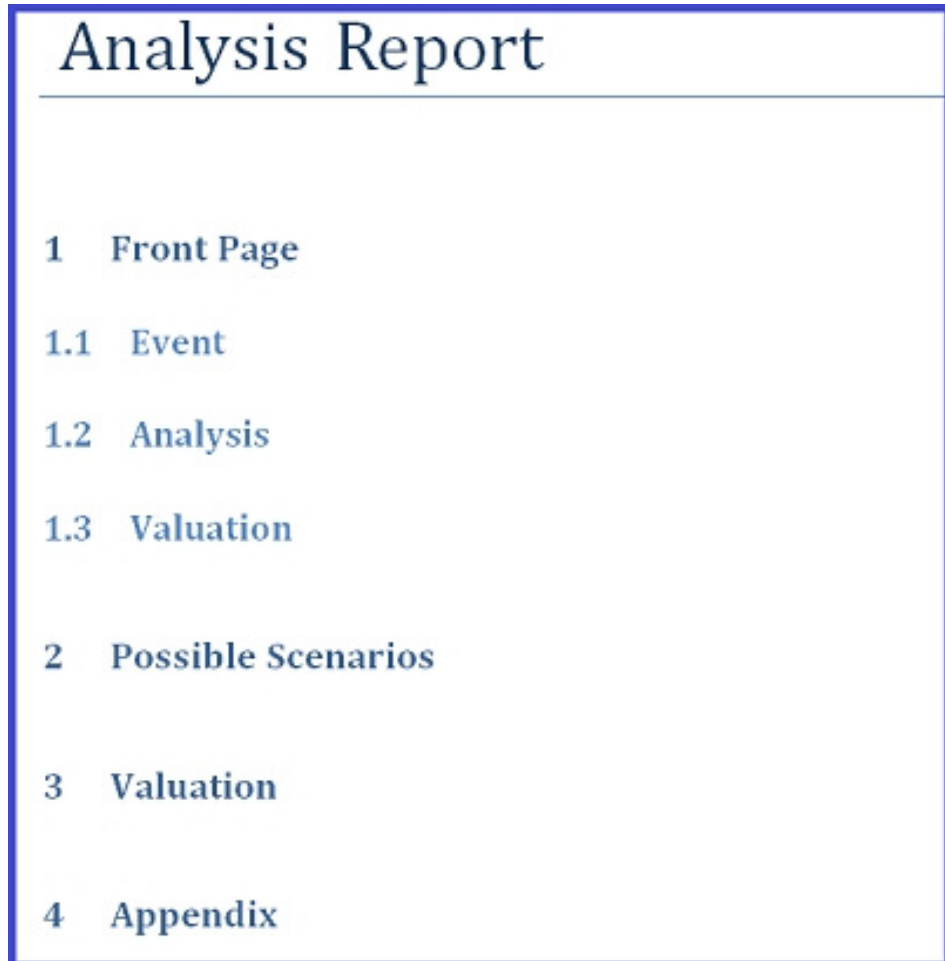
- 4 Select the document.

- 5 To open an earlier (specific) version of a document, 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 document 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 document

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

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

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

To check out an open document:

- Choose **File > Info > Edit**.

The document is checked out and ready for editing.

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

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

The **Open from Server** dialog displays

2. Navigate to the repository folder that contains the desired document. Or, in the dialog box, use the quick search feature to locate the desired document.
3. Select the desired document and click **Open**.

The document is checked out and ready for editing.

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

with the checked out icon. 

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

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

Saving document revisions

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

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

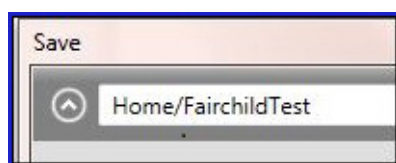
To save a revision of a document :

- 1 Perform one of the following:
 - To keep the document open: Click **File > Info > Save Revision to Server**.
 - To close documents: Click **File > Info > Save to Server & Close**.

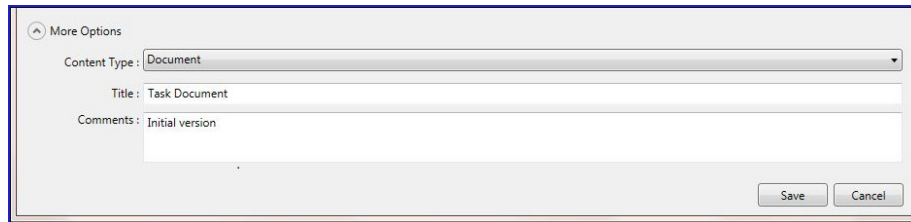
The **Save** dialog box is displayed. The dialog box displays repository-related information about the document you are saving.

➡ You are not allowed to change the location of the checked out document.

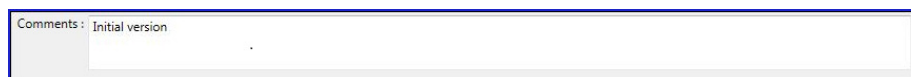
- 2 If you do not need the **Repository View** it can be collapsed. This is useful if a **Form** view is displayed which can make the vertical length of the dialog extend beyond the screen.



- 3 Specify the version of the document. Options may include **Major**, **Minor**, or **Overwrite the current version**.
- 4 Click **More Options** and modify any other available attribute fields as appropriate.



- ➔ Access to some of the following attribute fields is determined by your privileges.
- 5 Choose a content type from the **Content Type** drop-down menu.
- ➔ The document **Title** is populated automatically, however, this can be edited by the user.
- 6 In **Comments**, describe what was changed in the document.



- 7 If the dialog box includes a **Form** view, complete these additional fields:
- 8 Click **Save**.

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



- ➔ If the document includes validation rules, these are evaluated when you attempt to save the document. The system will notify you of any rules that have been violated. For example, certain fields that are empty that must be completed.
- ➔ When a document is checked in, any references to local images are converted to server references. These images will be checked in first and then will be related/referenced to the document on the server.
- ➔ 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.

Discarding changes and check out

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

The document 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**.

WORKING WITH THE SHAREPOINT REPOSITORY

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

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

Working with documents

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

Basic document features (SharePoint)

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

What is a business document

The following are just a few examples of business documents that can be created as XML-based structured documents:

- Research reports
- Policies and procedures
- Marketing materials
- Clinical trial reports

A business document is essentially a collection of sections. The first step in creating any document is to design the outline. The outline represents the hierarchy of sections that will comprise the document. The sections are organized in a hierarchy similar to chapters and subchapters in a book.

A top-level section can represent an introduction, summary, appendix, etc. You can create a hierarchy of sections by inserting child sections at various levels. The title numbering reflects the level of the section.

Analysis Report	
1	Front Page
1.1	Event
1.2	Analysis
1.3	Valuation
2	Possible Scenarios
3	Valuation
4	Appendix

Authoring a business document

The first steps in creating a business document are:

- *“Creating a new document”*
- *“Adding a document title”*
- *“Inserting sections”*

Creating a new document

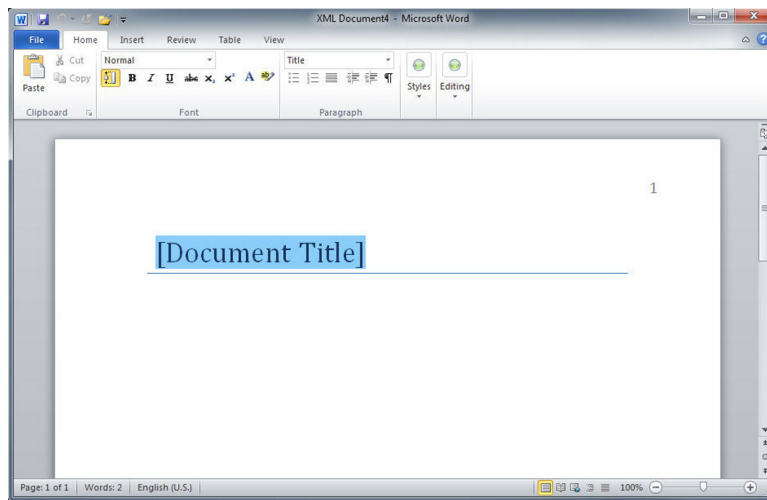
You can create new documents directly in Quark XML Author.

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

To create a new document:

- 1 Click **File > New XMLAuthor**.
- 2 In the XML Author menu, choose **New Business Document**.

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



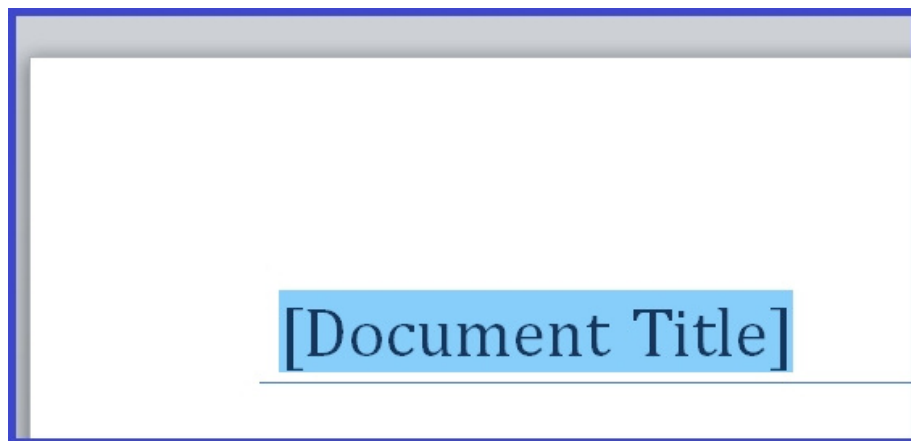
- 3 When you have finished authoring, save the document .

Adding a document title

Document titles are added on the Word canvas.

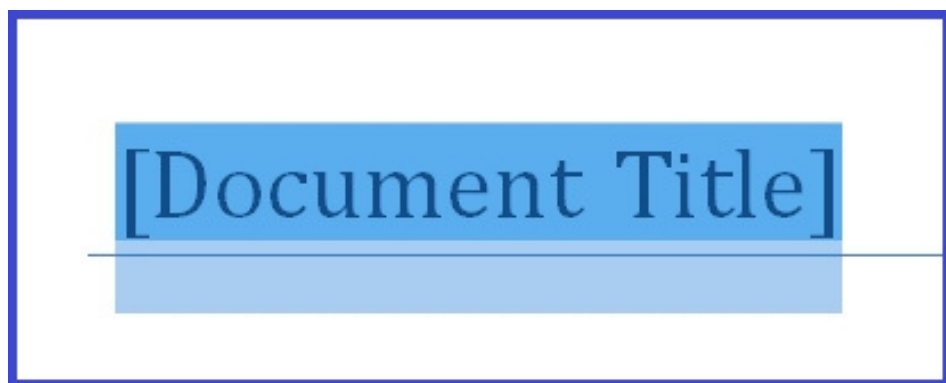
To add a document title:

- 1 Navigate to the document title placeholder at the beginning of the document.



- 2 Click the placeholder or move the cursor into the placeholder.

The entire placeholder text is selected.



- 3 Type the desired title.

The title is complete.

Analysis Report

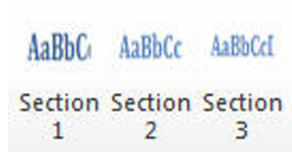
Inserting sections

Sections are inserted on the Word canvas.

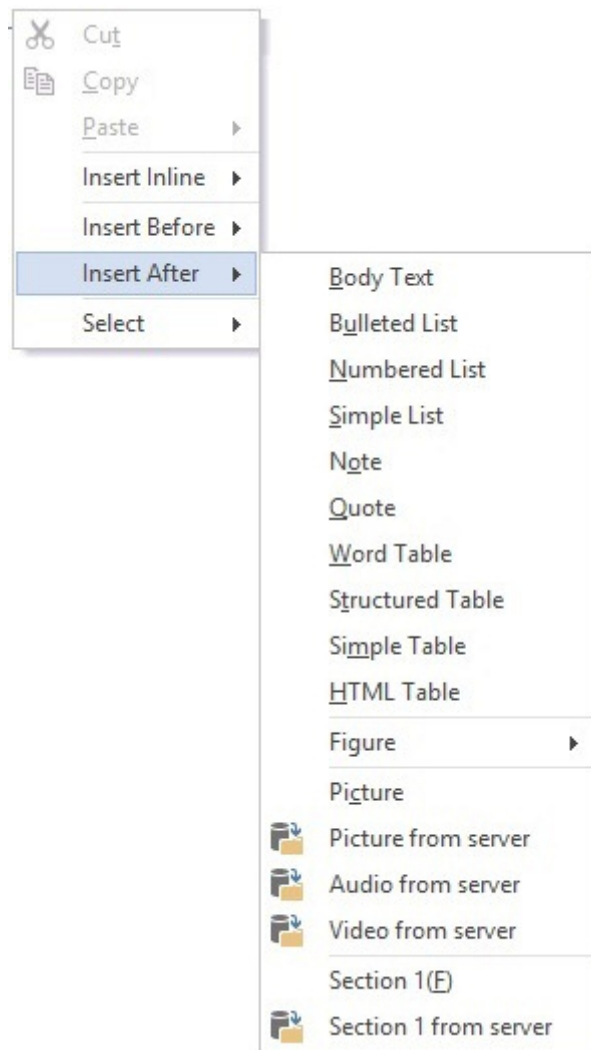
Sections are inserted just like any other element. The element name in the **Styles** group is “Section #”, where # represents the level of the section. See “[Inserting elements](#)”.

To add a section:

- 1 In the document, position the cursor where you want to insert the new section.
- 2 Use one of the following methods:
 - In the **Home** ribbon > **Styles** group, click **Section#**.



- Right-click and choose **Insert Before** or **Insert After** > **Section** from the context menu.



- ➔ You can select **Section from server**, bringing up the **Reference from Server** dialog box. This allows you to search for and select a Section that had previously been saved to the repository.

Through this option a user can insert existing documents from the Server as a sub part in the main document.

Once inserted, the following operations are possible on the Sections inserted from Server:

- Edit Component
- Edit component inline
- Pin Component reference
- Convert to local reference
- Make content inline
- Open as read only

In both of these methods, **Section** will only be available if your current position in the document allows sections.

The section is inserted and is ready for content elements to be added, such as paragraphs, tables, figures, and child sections.

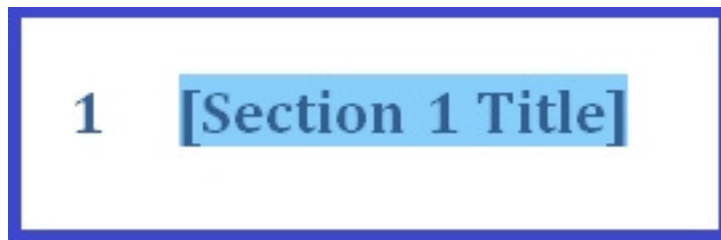
- ➔ Using the **Home** ribbon method will allow you to nest sections up to 3 deep. If you require a deeper nesting of sections, you must use the right-click context menu method.

Adding a section title

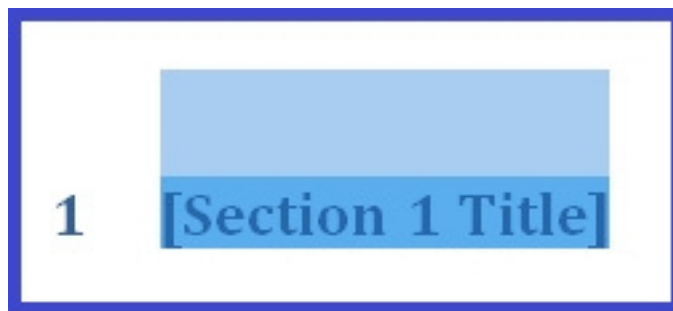
A section title is added on the Word canvas.

To add a section title:

- 1 Navigate to the desired section title placeholder.



- 2 Click the title placeholder or move the cursor into the placeholder.
The entire placeholder text is selected.



- 3 Type the desired title.
The title is complete.



Changing section numbering

Section numbering is changed on the Word canvas.

For a given section, you can perform one of the following actions:

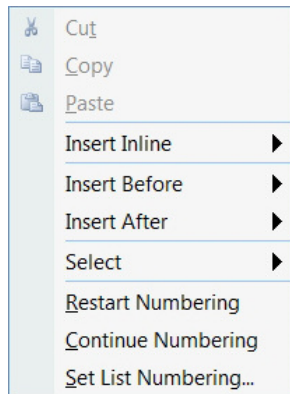
- Restart numbering at 1.
- Continue numbering from the previous section.
- Set numbering to a specified value.

To change the numbering:

- 3 Possible Scenarios

1 Valuation

- 1 Right-click on the desired section title.
- 2 in the context menu, choose the desired command.



- 3 The section number in set.

- 3 Possible Scenarios

4 Valuation

Saving in Microsoft Word format

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

To e-mail the current document:

- 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 document as an attachment in the Quark XML Author format.

E-mailing as a Word attachment

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

To e-mail the current document:

- 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 document 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 (body text, lists, tables, etc.) to create a valid document.

About insertion points

Insertion Points are the locations in a (body text, lists, tables, etc.) where new elements are inserted. By default, these do not appear.

These locations exist before, after, and between any existing elements.

Inserting elements

Elements are inserted on the Word canvas.

To insert an element:

- 1 In the (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** group 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.

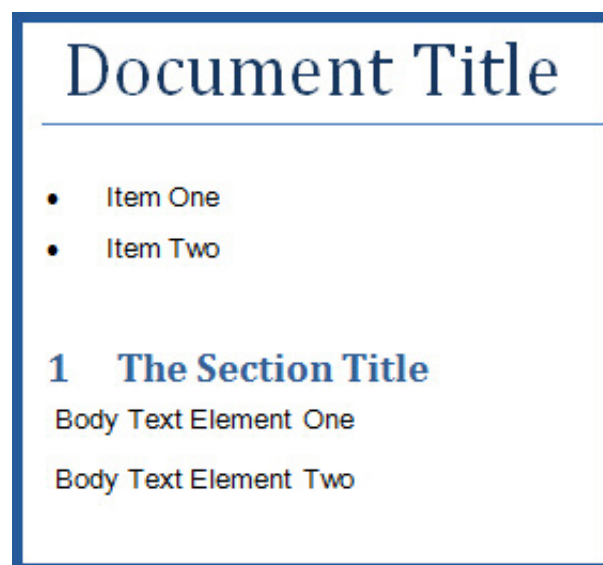
About inserting elements and structured authoring

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

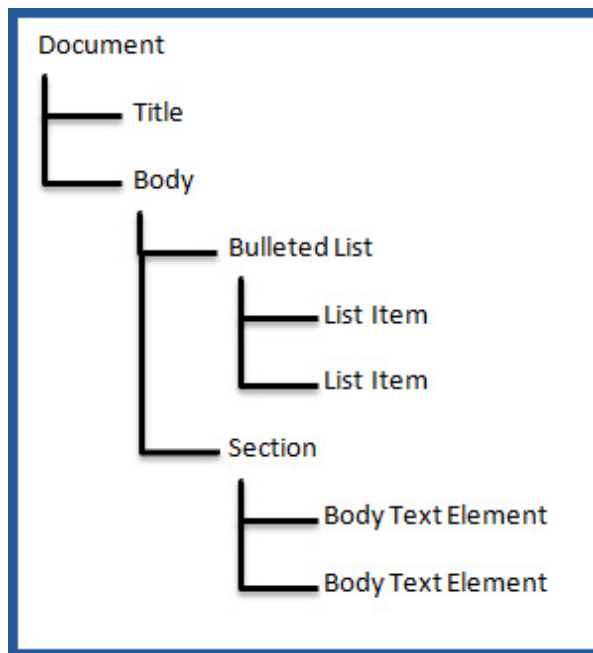
Technically, this means that your document(body text, lists, tables, etc.) must follow the structure rules specified by the XML schema for the type of document(body text, lists, tables, etc.) you are authoring.

For example, a resume has contact information, an objective, a list of skills, and sections for experience and education. A business letter, on the other hand, has a date, greeting, body, and salutation. The elements of these document types occur in a specific order or location and frequency. When those rules are followed, these documents exhibit a familiar structure.

In the following example, let's assume we are using a typical authoring schema. We have a simple document 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:



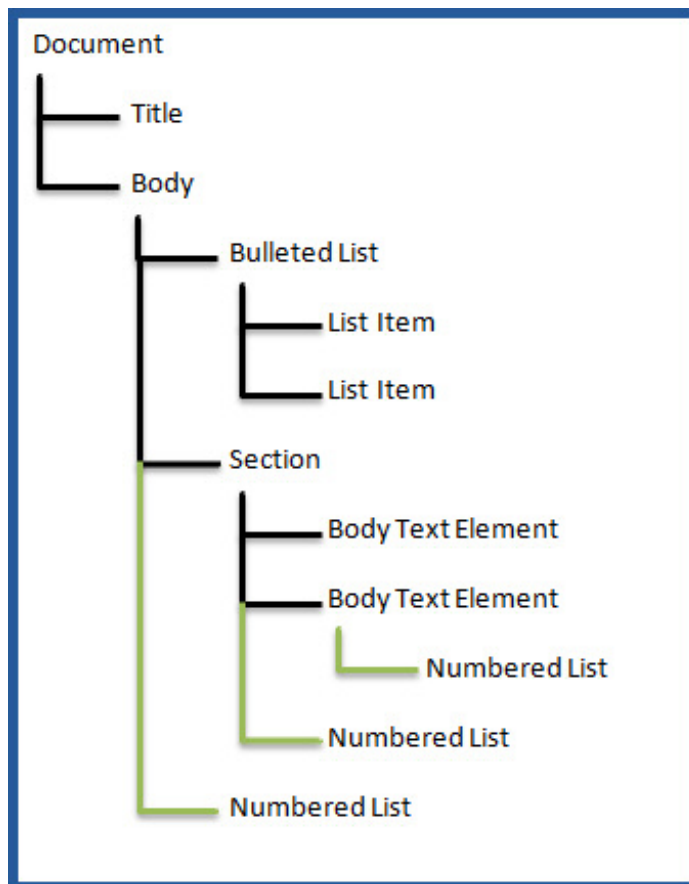
Internally the structure of the document has the following hierarchy:



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 document structure.



The more deeply nested the content is in a document, 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.

Copying elements

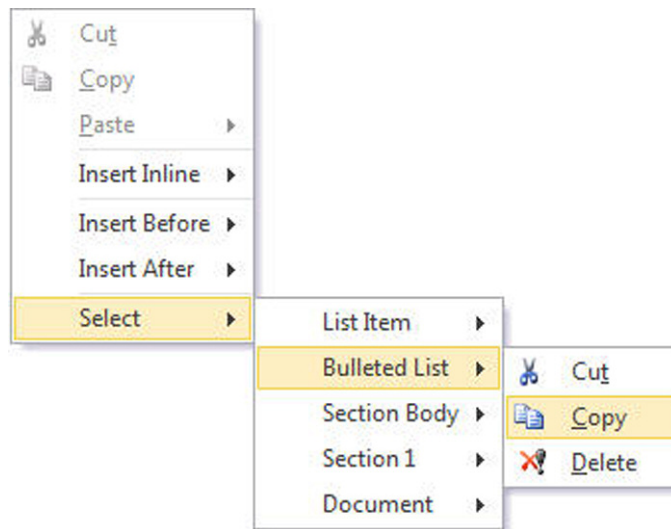
An entire element, including its attributes and any child elements, may be copied to a new location in a document or to a different document.

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**.

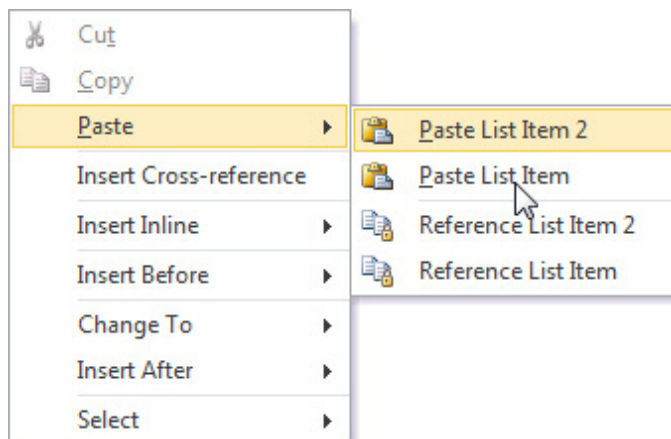


The element is copied to the clipboard.

- 3 In the document, 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 document or to a different document.

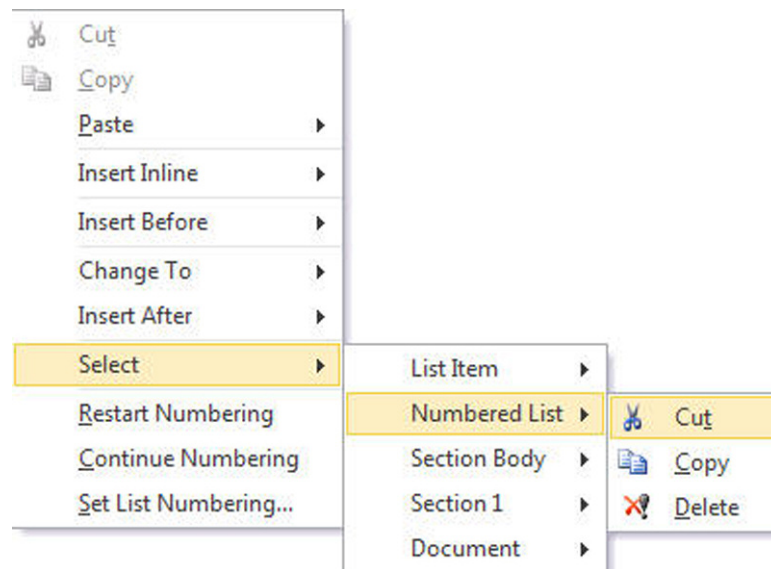
The element and any of its child elements may be content references.

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

To move an element:

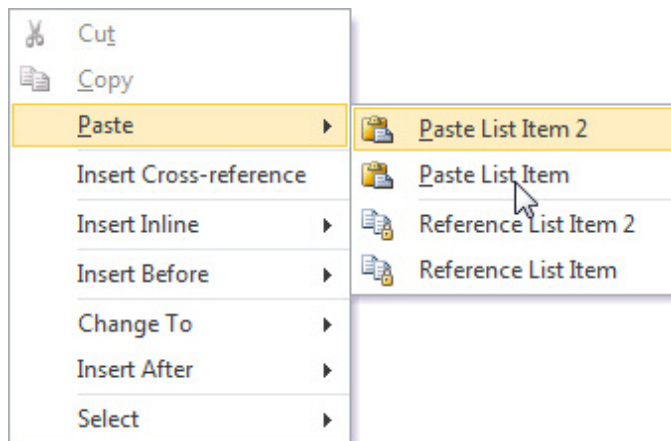
- 1 Right-click on the element that you want to move.
- 2 In the context menu, choose **Select**, the desired element, and then **Cut**.

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 document, 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.

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.

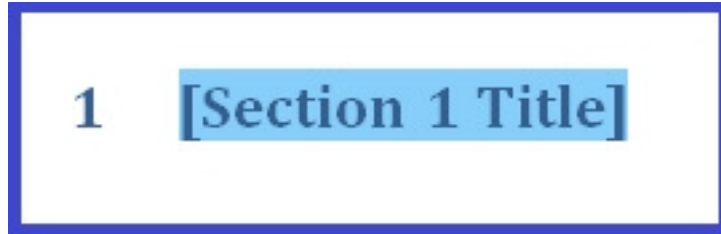
About placeholders

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 document the same way as any other element. Editing is performed using the MathType™ equation editor directly from the Microsoft Word canvas.

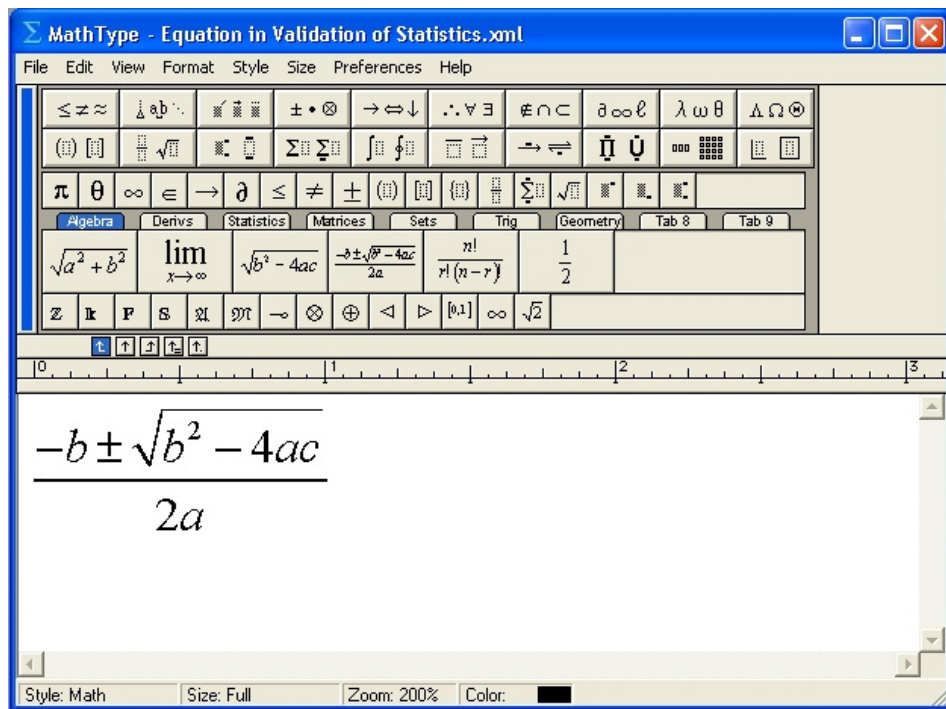
Inserting math equations (Newline)

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:

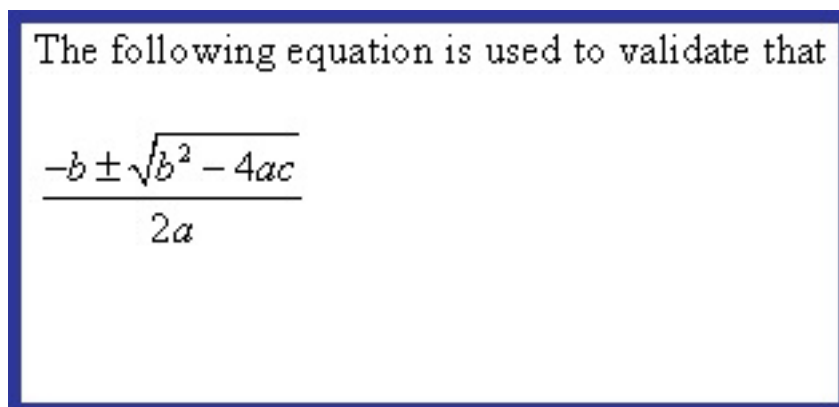
- 1 In the document, position the cursor where you want to insert the math equation.
- 2 Right-click and choose **Insert Before** or **Insert After** from the context menu, and then choose **Figure > Equation**. **Figure > Equation** will be available if your current position in the document allows equations.

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.



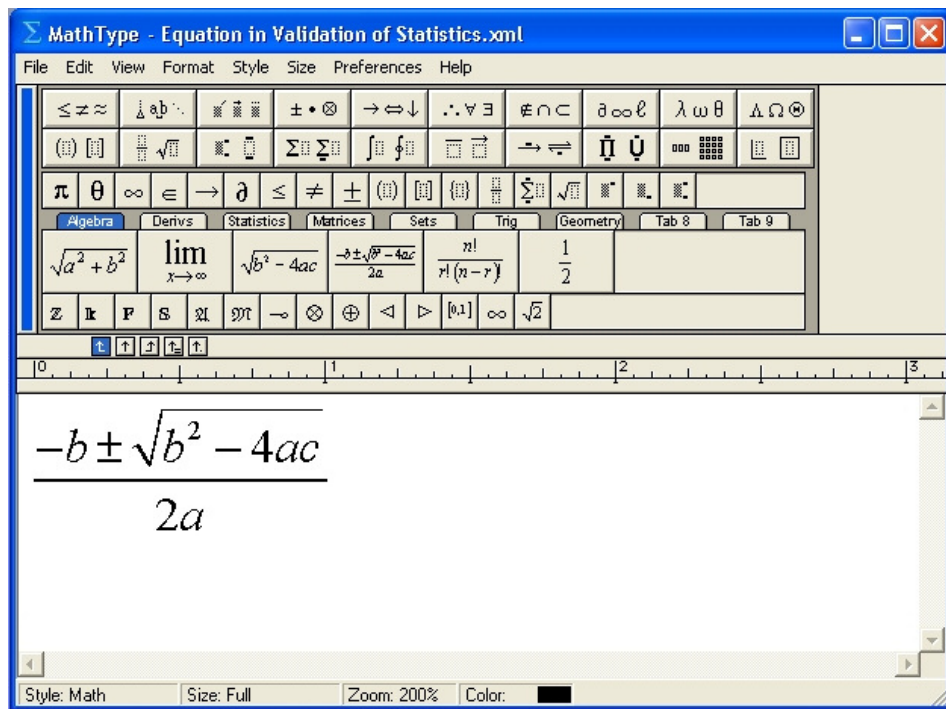
Inserting math equations (Inline)

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:

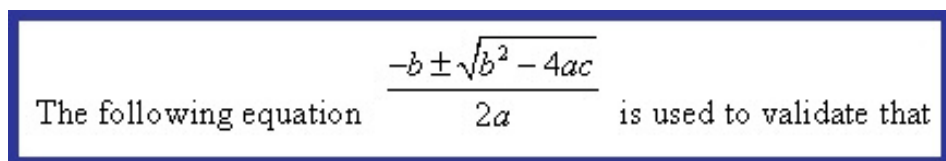
- 1 Position the cursor at the location in the text where you want to insert.
- 2 Right-click and choose **Insert Inline > Equation** from the context menu.

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.

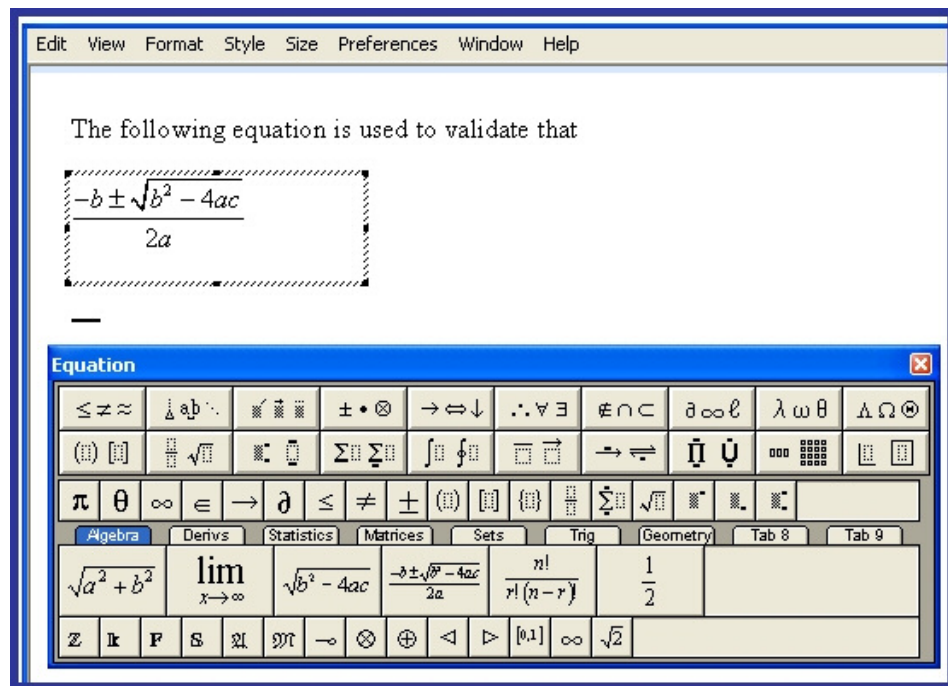


Editing math equations

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

This feature applies to both newline and inline equations.

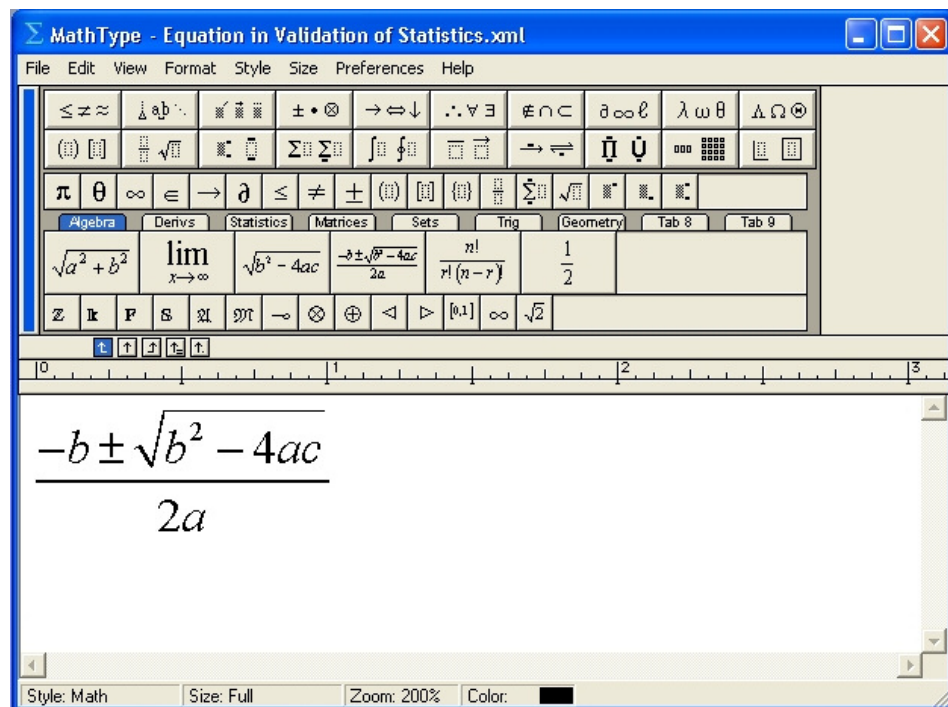
To edit equations on the Word canvas instead of in the equation editor dialog, change the **Object Editing Preferences** setting in the *MathType* application.



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
- HTML Table
- Standard Word 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 document type.

To insert a table:

- 1 In the document, 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 right-click context menu method. These are not valid table types in the **Insert Table** dialog.

Structured tables

When you insert a table in a document, it already has rows and columns with cells that you can fill in. It also has a particular format that helps to define its look.

After you insert a table, you can perform *custom formatting*, using the **Table** tab. You can add, remove, copy, move, and resize rows and columns, adjust cell margins and alignment, change shading, merge and split cells and specify text alignment and direction.

In a structured table, a table cell can support content such as text, bulleted and numbered lists, pictures, notes, quotes and equations. As you type text or insert other content in a cell, the cell expands as needed.

You can copy, cut, and paste the contents of cells just as you do text and graphics in any other part of a document.

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.

Word tables

This feature is available in Quark XML Author for Word version 2010 and higher.

The Word Table feature allows the user to embed a fully functional Word document within an XML Author document. While editing the Word document, the user has access to all of Word's functionality. The intended use of this feature is to support embedded large/complex tables. The user is able to insert Word tables at locations within the document structure that are allowed by the rules of the document type. When the user inserts a Word Table, the system displays a scaled rendering of the Word table on the canvas in the XML Author document. The scaled rendering displays the content of the first "printed" page of the Word table.

➡ This feature is available in Quark XML Author for Word version 2010 and higher.



To view or edit, double-click the rendering in the Word table element. A new Word window is launched that contains the table content and is ready for viewing or editing.

In an XML Author document, Word Tables are treated like other block elements. The same content component features are available: component Cut, Copy, Paste, Delete, apply metadata, content reference, Undo, etc. However, if the Word Table is inserted as an inline element, then content reference is not available.

For Word Tables, the Track Changes feature supports the tracking of inserted and deleted Word Tables within a Quark XML Author document.

Word Tables supports embedded images and linked images. Note that just as in a standard Word document, linked images run the risk of not displaying if the image can't be found at the specified location or the location cannot be accessed for some reason.

Editing Word tables

In a Quark XML Author document, a Word table is represented as a scaled rendering of the first “printed” page of the Word table. The full Word table is edited in a separate Word window.

To edit a Word table:

- 1 Double-click on the desired Word table element.

A new Word window is launched that contains the Word table content and is ready for editing.

- 2 Edit the table content as needed.
- 3 Close the Word document.

Any changes made to the Word table in the Word window are synchronized and stored with the Word table element in the XML Author document.

Viewing Word tables

In a Quark XML Author document, a Word table is represented as a scaled rendering of the first “printed” page of the Word table. The full Word table can be viewed in a separate Word window. The typical use of this feature is to view documents that are designated as read-only.

To view a Word table:

- 1 Double-click on the desired Word table element.
- 2 View the Word table content.

- 3 When you have finished viewing the Word table, close the Word document.

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 configured. 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).

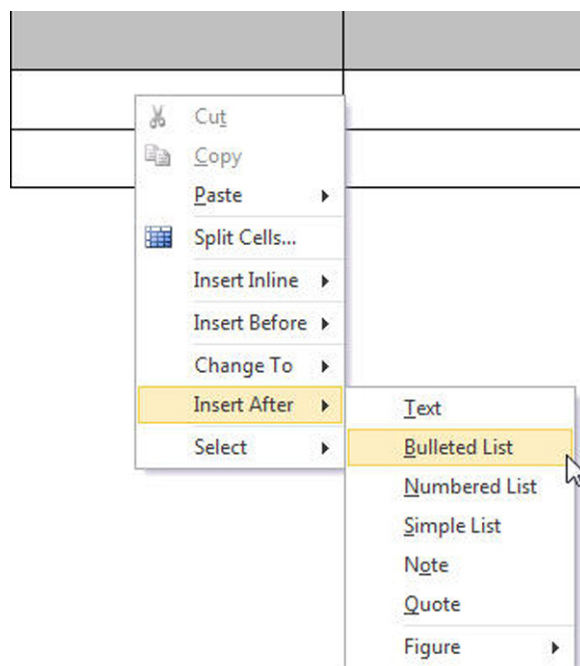
The following features are also available when authoring tables:

- 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”.

<ul style="list-style-type: none"> Item one

If later you decide that you need text at the top of the cell, simply enter the text in the text element.

<p>First paragraph</p> <ul style="list-style-type: none"> Item one

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.

- Florida
- Orlando Manufacturing Site
- Miami Manufacturing Site
- Georgia

2 For lists in table cells, in the **Home** ribbon, click **Increase Indent**.

The selected list items are indented.

- Florida
 - Orlando Manufacturing Site
 - Miami Manufacturing Site
- Georgia

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.

- Florida
 - Orlando Manufacturing Site
 - Tampa Manufacturing Site
 - Jacksonville Manufacturing Site
 - Miami Manufacturing Site

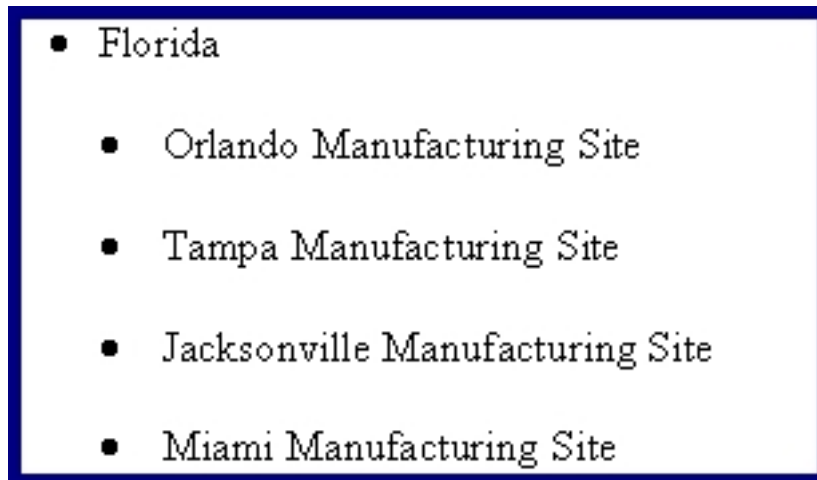
2 For lists in table cells, in the **Home** ribbon, click **Decrease Indent**.

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 document. 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 accommodate 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 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 document, 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 document 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 repository local and network folders. When a document is checked in, non-repository images are uploaded and become available for reuse in other documents.

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 repository picture, click **Insert** ribbon > **Picture**, or right-click and choose one of the following options:

- **Insert Before > Figure > Picture from server.**
 - **Insert After > Figure > Picture from server.**
- 3 To insert a non-repository picture, click **Insert** ribbon > **Picture**, or right-click and choose one of the following options:
- **Insert Before > Figure > Picture.**
 - **Insert After > Figure > Picture.**
- 4 For repository pictures, use the **Reference from Server** dialog to navigate to the folder that contains the picture you want to insert. Or, in the dialog box, use the search feature to locate the desired content:
- To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

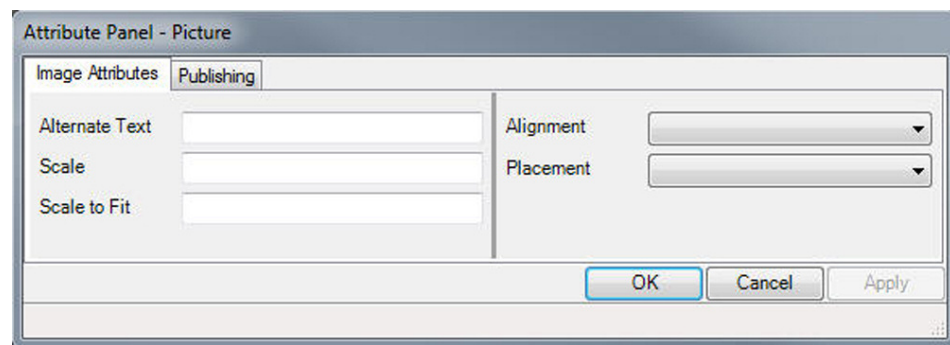
The search results are displayed.

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

- 5 For non-repository pictures, use the Insert Image dialog. In the **Insert Picture** dialog, navigate to the picture that you want to insert.
- 6 Click the picture
- 7 Click **OK**.

The picture is inserted.

- 8 To specify where the picture will be positioned by the publishing process, right-click on the picture and choose **Picture 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 will need to remove the unresolved reference and reinsert a new 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 document, 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 To insert a repository picture, in the context menu, choose **Insert Inline > Picture from server**
- 3 To insert a non-repository picture, in the context menu, choose **Insert Inline > Picture:**
- 4 For repository pictures, use the **Reference from Server** dialog to navigate to the folder that contains the picture you want to insert. Or, in the dialog box, use the search feature to locate the desired content:
 - To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

The search results are displayed.

- ➔ You can choose to view the results in either  list view or  snippet view.
- 5 For non-repository pictures, use the Insert Image dialog. In the **Insert Picture** dialog, navigate to the local or network folder that contains the desired picture
 - 6 Click the picture
 - 7 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 document 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.

Inserting audio from the repository

Quark XML Author lets you insert audio in a document anywhere that they are allowed in your XML schema. An audio element is created and Quark XML Author displays the name of the audio asset on the Microsoft Word canvas.

Only audio content that has been added to the repository may be inserted.

Quark XML Author supports the following audio file formats:

- wav
- mpeg
- midi
- basic
- mpa
- mpa-robust
- mp4a-latm
- ogg
- 3gpp
- 3gpp2
- ac3
- adpcm
- amr
- amr-wb
- amr-wb+
- asc
- x-wav
- x-aac
- x-aiff
- x-mpegurl
- x-pn-realaudio
- x-ms-wax
- x-ms-wma
- x-pn-realaudio



To insert audio:

- 1 In the document, navigate to the place where you want to insert the new audio.
- 2 Use one of the following methods:
 - Right-click and choose **Insert Before** or **Insert After** and then choose **Audio from server** from the context menu.
 - In the **Home** ribbon > **Styles** tool, choose **Audio from server**.

➔ **Audio from server** will be available if your current position in the document allows audio.

- 3 In the **Reference from Server** dialog, navigate to the repository audio file that you want to insert.
- 4 Or, in the dialog box, use the search feature to locate the desired content:
 - To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

The search results are displayed.

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

- 5 Click the audio file.
- 6 Click **OK**.

The audio element is inserted and Quark XML Author displays the name of the audio asset on the Microsoft Word canvas.

Inserting video from the repository

Quark XML Author lets you insert video in a document anywhere that they are allowed in your XML schema. A video element is created and Quark XML Author displays the name of the video asset on the Microsoft Word canvas.

Only video content that has been added to the repository may be inserted.

Quark XML Author supports the following video file formats:



- mpeg
- quicktime
- 3gpp
- h263
- h264
- jpeg
- mp4
- ogg
- x-flv
- x-la-asf

- x-ms-asf
- x-msvideo
- x-sgi-movie

To insert video:

- 1 In the document, navigate to the place where you want to insert the new video.
 - 2 Use one of the following methods:
 - Right-click and choose **Insert Before** or **Insert After** and then choose **Video from server** from the context menu.
 - In the **Home** ribbon > **Styles** tool, choose **Video from server**.
- ➔ **Video from server** will be available if your current position in the document allows video
- 3 In the **Reference from Server** dialog, navigate to the repository video file that you want to insert.
 - 4 Or, in the dialog box, use the search feature to locate the desired content:
 - To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.

The search results are displayed.

- ➔ You can choose to view the results in either  list view or  snippet view.
- 5 Click the video file.
 - 6 Click **OK**.

The video element is inserted and Quark XML Author displays the name of the video asset on the Microsoft Word canvas.

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

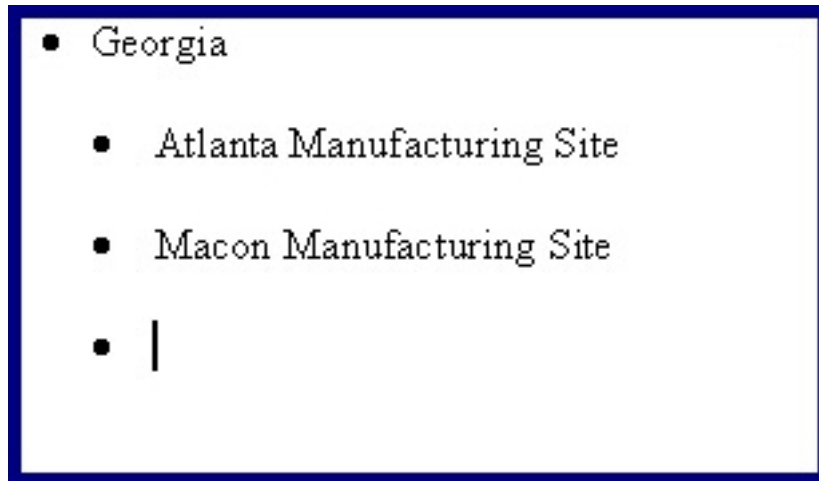
Available List Styles

➔ Lists may be changed from one style to another.

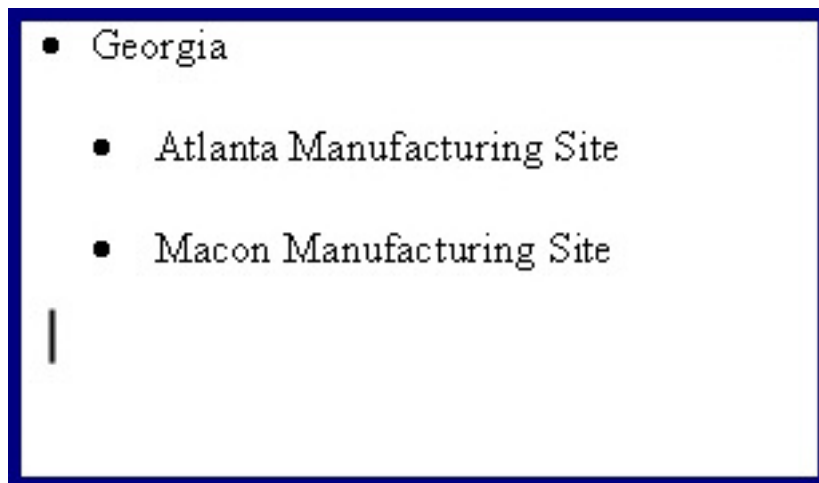
- Bulleted list
- Numbered list
- Paragraph

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.

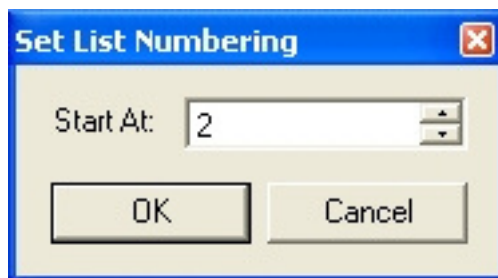
- 1 Right-click on the list item at the point in the list where you want to set the numbering.



- 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.

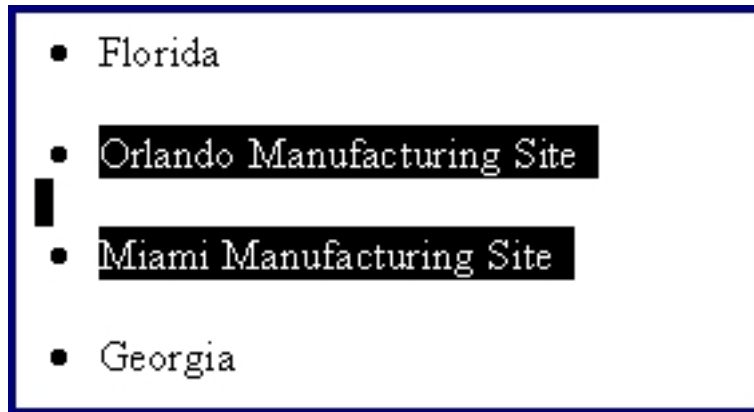
- Florida
 - a. Orlando Manufacturing Site
 - b. Tampa Manufacturing Site
 - c. Miami Manufacturing Site
- Georgia
 - d. Atlanta Manufacturing Site
 - e. Macon Manufacturing Site

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.

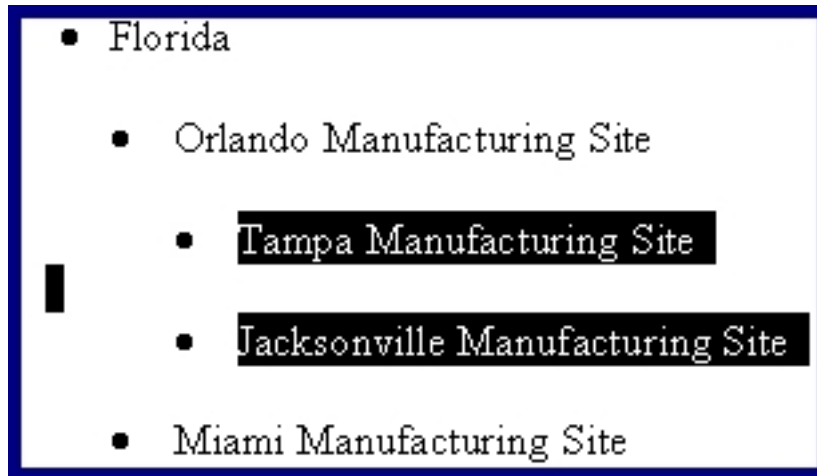


Decreasing indent of list items

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.

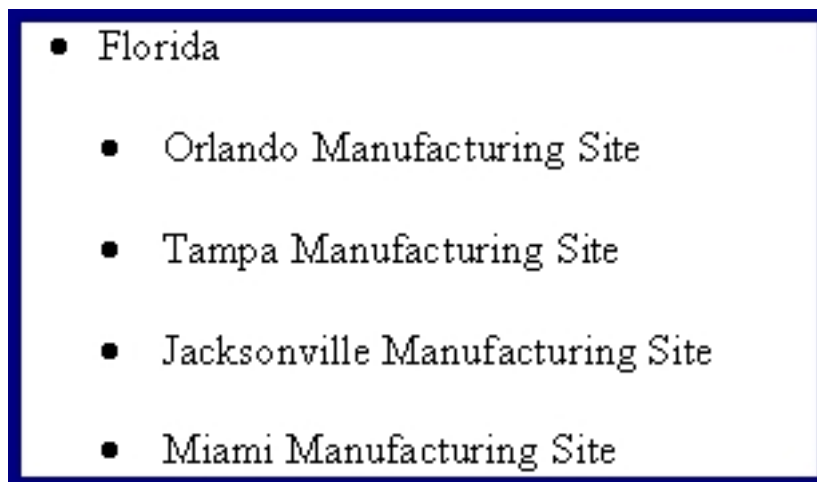


2 Use one of the following methods:

- Press **Shift + Tab**.
- In the **Home** ribbon, click **Decrease Indent**.



The indent of the selected list items is decreased.



About character formatting

Bold and italic may be applied to a word, phrase or multiple text elements. This formatting feature is similar to the formatting feature in Word.

Formatting text

Character formatting may span multiple text elements. The various types of character formatting may be overlapped and may be nested.

To format text:

- 1 Select the text that you want to format.

2 On the **Home** ribbon, click the desired formatting.

- Bold
- Italic
- Underline
- Strikethrough
- Subscript
- Superscript

The formatting is applied to the selected word, phrase or text elements.

Removing text formatting

The process for removing text formatting is similar to the process in Word.

To remove formatting:

1 Select the text from which you want to remove formatting.

2 On the **Home** ribbon, click the desired formatting.

- Bold
- Italic
- Underline
- Strikethrough
- Subscript
- Superscript

The formatting is removed from the selected word, phrase or text elements.

Applying font color

Text foreground color may be applied to a word, phrase or multiple text elements.

This is done using the Font Color feature.

To set the color:

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

2 Click **Home** ribbon > **Set Font Color**.

3 In the **Font Color** dialog, select the desired color.

4 Click **OK**.

Removing font color

Text foreground color may be removed from a word, phrase or multiple text elements. This is done using the Font Color feature.

To remove the color:

1 Select the text from which you want to remove color.

2 Click **Home** ribbon > **Set Font Color**.

- 3 In the **Font Color** dialog, select **No Color**.
- 4 Click **OK**.

Applying text highlight color

Text background color may be applied to a word, phrase or multiple text elements. This is done using the **Text Highlight Color** feature.

To set the background color:

- 1 Select the text to which you want to apply background color.
- 2 Click **Home** ribbon > **Set Text Highlight Color**.
- 3 In the **Text Highlight Color** dialog, select the desired color.
- 4 Click **OK**.

The background color is applied to the selected word, phrase or text elements.

Removing text highlight color

The text background color may be removed from a word, phrase or multiple text elements. This is done using the **Text Highlight Color** feature.

To remove the background color:

- 1 Select the text from which you want to remove background color.
- 2 Click **Home** ribbon > **Set Text Highlight Color**.
- 3 In the **Text Highlight Color** dialog, select **No Color**.
- 4 Click **OK**.

The background color is removed from the selected word, phrase or text elements.

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

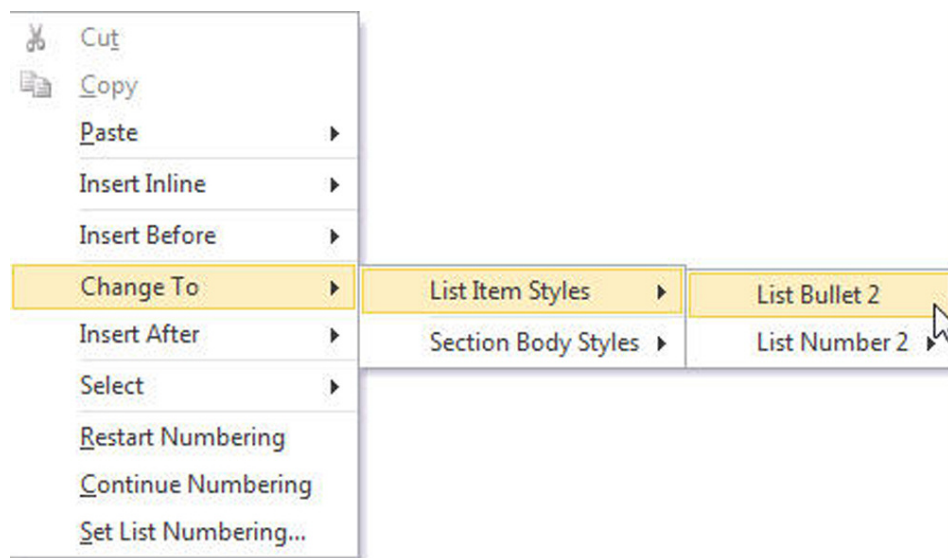
Lists

- 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 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.

- 
1. Orlando Manufacturing Site
 2. Tampa Manufacturing Site
 - Miami Manufacturing Site

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 document 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 be 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.

- 
- Orlando Manufacturing Site
 - Tampa Manufacturing Site
 - Miami Manufacturing Site

- 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.

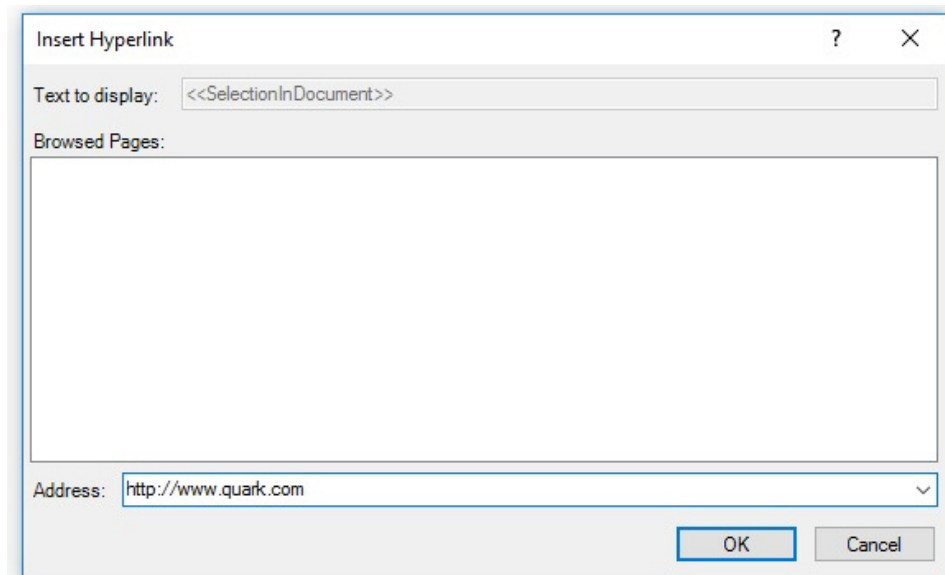
Inserting hyperlinks

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**.

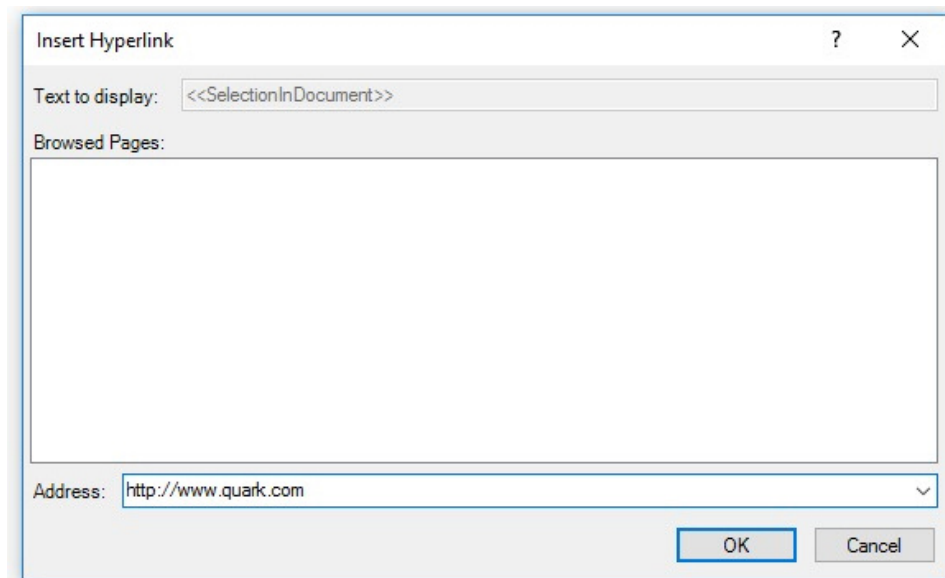
The hyperlink is inserted at the specified location.

➡ 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

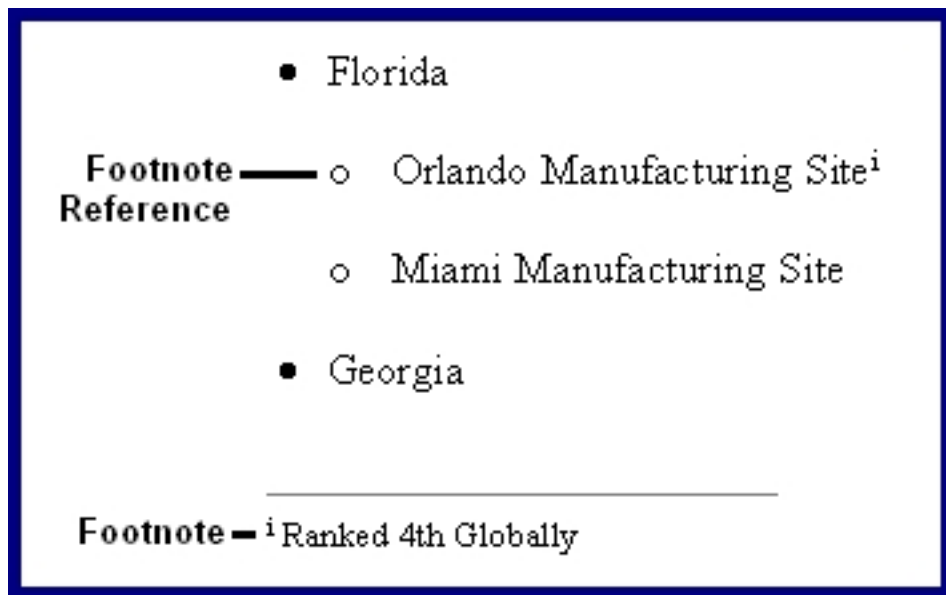
The working with notes section provides details on all notes-related features and capabilities found in Quark XML Author.

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 page



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 document, 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:

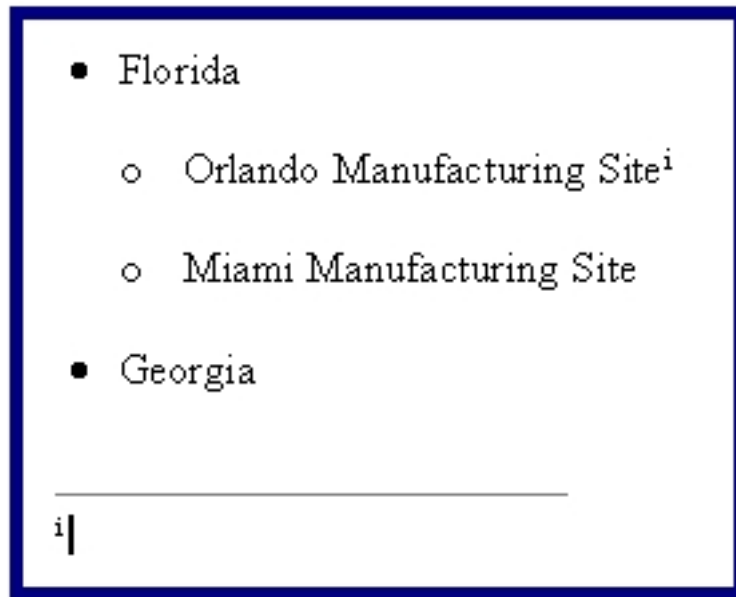
- 1 Select the text that you want to receive the footnote.



- 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.

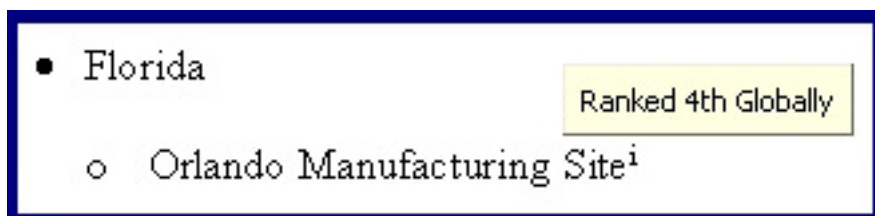


3 Enter the text of the footnote.

The footnote is complete.



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

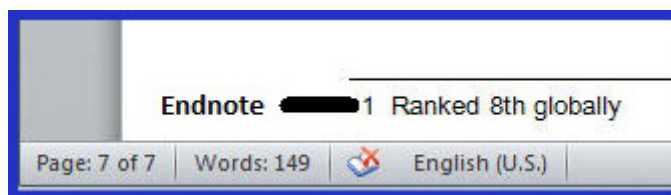


About endnotes

The Endnote feature in Quark XML Author is similar to the feature found in Microsoft® Word. Endnotes 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 document. Typically, endnotes are used to provide citation of sources.

When you insert an endnote, this feature creates an Endnote and an Endnote Reference. A superscript of the note's number is displayed next to the word or phrase you selected. This is the Endnote Reference which references the note text that you type in the Endnote. Endnotes are listed under a separator located at the end of the document.



Endnote rules:

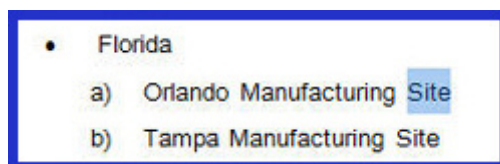
- Endnotes use the Arabic numbering scheme (i.e., 1, 2, 3).
- When narrative text that contains an endnote is copied and pasted into the same document, the endnote is also copied. This is also true if the entire element is copied and pasted

Inserting endnotes

Endnotes are added to a word or phrase.

To insert an endnote:

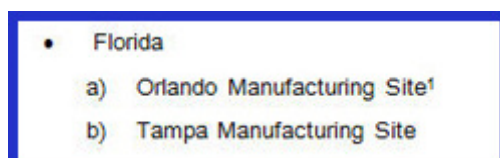
- 1 Select the text that you want to receive the endnote.

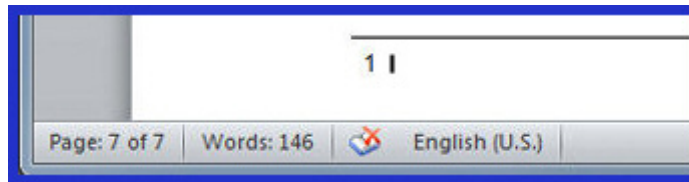


- 2 Click **Insert** ribbon > **Insert Endnote**.



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





- 3 Enter the text of the endnote.

The endnote is complete.



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	
Table cell	Table cell ¹
Table cell ²	test
1 This is a table note 2 This is a table note	

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 document, 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**.

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

Manufacturing Site	
Atlanta ¹	
Macon	
1	

- 3 Enter the text of the table note.

The table note is complete.

Manufacturing Site	
Atlanta ¹	
Macon	
1 Ranked 9th Globally	

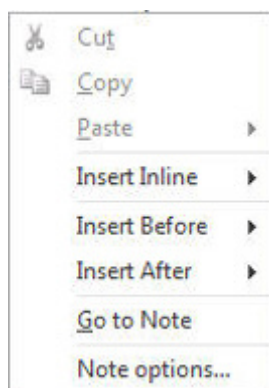
Assigning a starting number to a note

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.

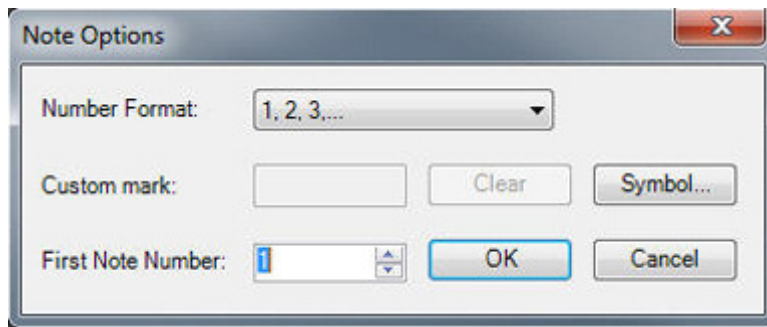
The context menu is displayed.



- 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.

Manufacturing Site	
Atlanta ⁴	
Macon	
4 Ranked 9th Globally	

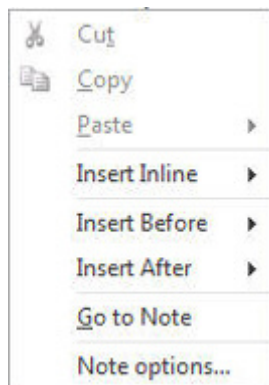
Assigning a custom mark or citation to a note

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.

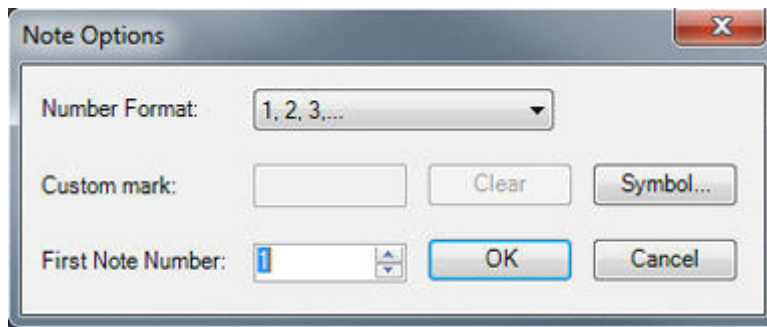
The context menu is displayed.



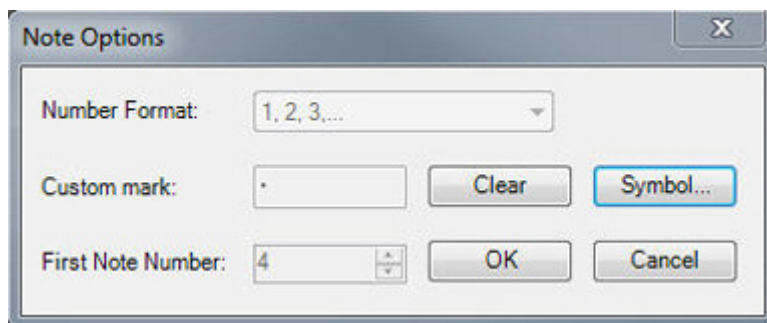
- 2 In the context menu, choose **Notes options**.

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.

Manufacturing Site	
Atlanta	
Macon	

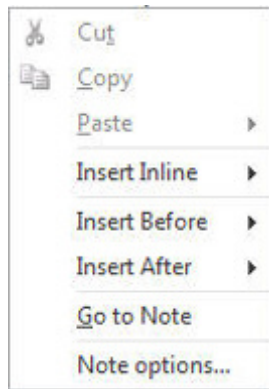
• Ranked 9th Globally

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 document 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.

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 document or to a separate document. 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” document that you want as the target of the cross-reference.
- ➡ In Quark XML Author, if you have made any changes to the destination document, the document must be saved before a reference can be created. Saving creates IDs for the document elements which allow them to be referenced.
- ➡ To insert a reference to a specific version of a document open the earlier (specific) version of the document rather than the latest version.
- 2 In the destination document, 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” document where you want to insert the cross-reference.
- 6 In the source document, 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.

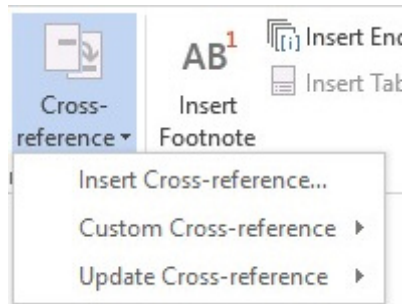
The dialog lists both **Reference Types** and **Insert Reference To** drop-downs. The former is a list of allowable reference types of a target. The latter contains dynamic properties of the referred type, which can help construct a more meaningful cross-reference string.

Cross-references are added to a word or phrase.

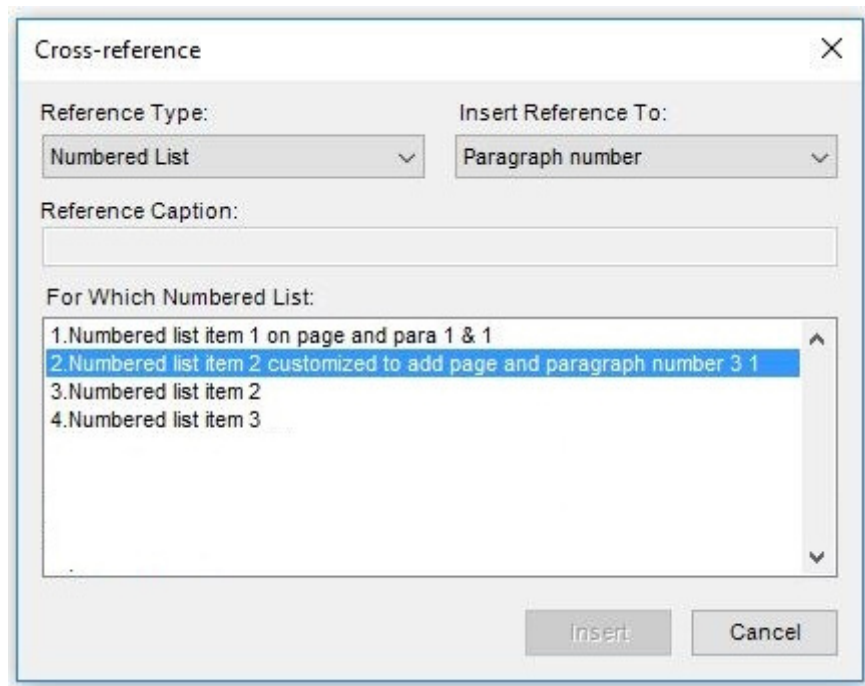
The destination of the cross-reference you want to insert must already exist.

To insert a cross-reference:

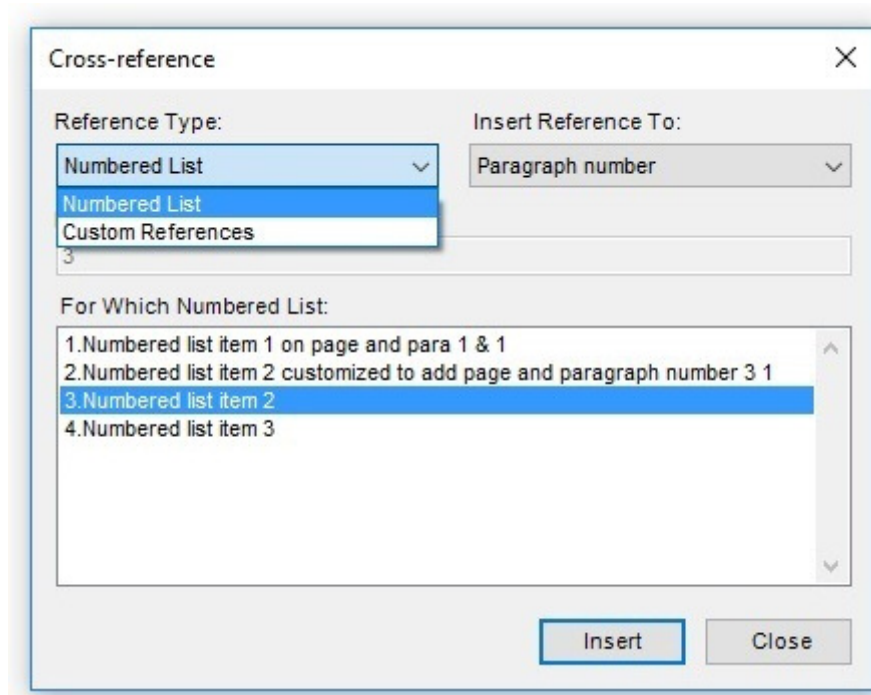
1. Click **Insert Ribbon > Cross-reference > Insert Cross-reference**



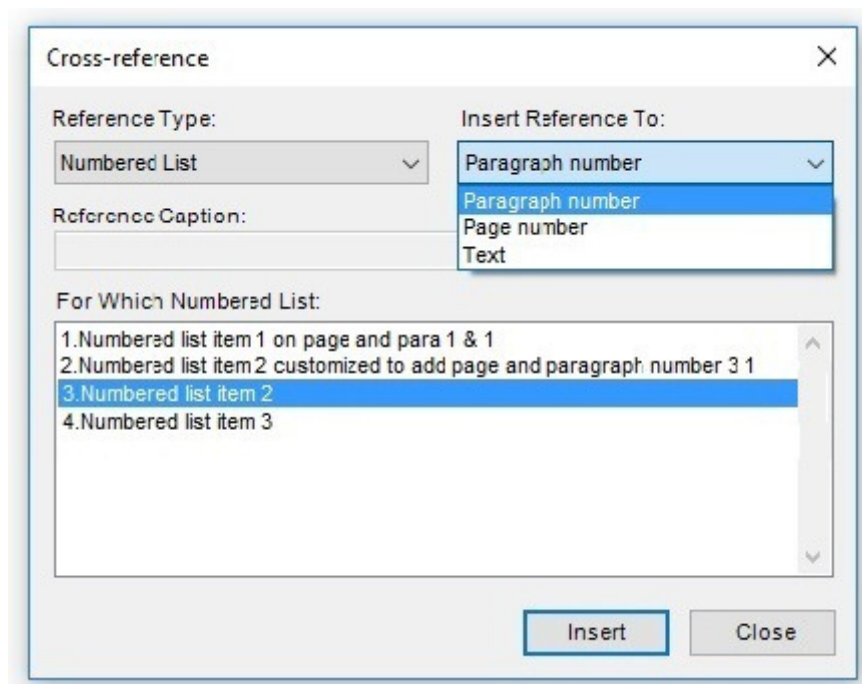
2. The **Cross-reference** dialog opens.



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:

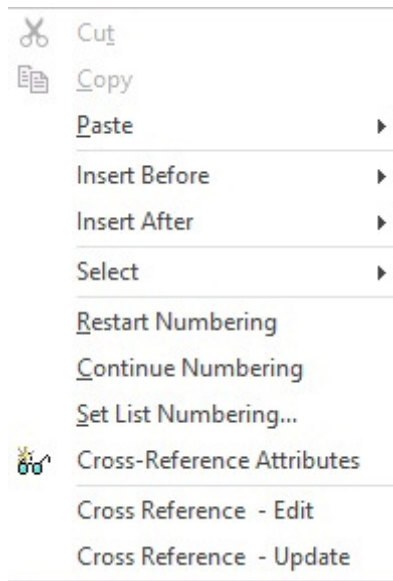
- 1 Select the interior text of the cross-reference.
- 2 Type the new text and then remove the first and last characters of the link text,

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**.



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 cross-references and embedded Word documents

Cross-references are allowed in Word documents that are embedded in a Quark XML Author document. A cross-reference is added to a word or phrase, and has a target or destination. In an embedded Word document, the destination may be a specified location within the same document or a location within a Quark XML Author document. The Quark XML Author document may be the parent of the embedded Word document or it may be a different Quark XML Author document. The user is able to click on a cross-reference and follow the link to a specified location within a document. The inserted link contains descriptive text that can be customized or stock text such as “Cross-Reference”.

Inserting a cross-reference to a Quark XML Author document

Cross-references are added to a word or phrase.

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

The destination may be the Quark XML Author document that contains the embedded Word document or it may be another Quark XML Author document.

To insert a cross-reference:

- 1 Open the “destination” document that you want as the target of the cross-reference.
- ➔ In Quark XML Author, if you have made any changes to the destination document, the document must be saved before a reference can be created. Saving creates IDs for the document elements which allow them to be referenced.
 - ➔ To insert a reference to a specific version of an element open the earlier (specific) version of the document rather than the latest version.

- 2 In the destination document, 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 embedded Word document where you want to insert the cross-reference.
- 6 In the embedded Word document, navigate to the word or phrase where you want to insert the cross-reference.
- 7 Select that word or phrase.
- 8 Click **Insert** ribbon > **XML Author 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 within the same document

Cross-references are added to a word or phrase.

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

The destination may be to a location within the same embedded Word document.

To insert a cross-reference:

- 1 Open the embedded Word document where you want to insert the cross-reference.
- 2 Navigate to the word or phrase where you want to insert the cross-reference.
- 3 Select that word or phrase.
- 4 Click **Insert** ribbon > **Cross-Reference**.
Word's standard **Cross-Reference** dialog is displayed.
- 5 In Word's **Cross-Reference** dialog, select the target of the cross-reference. All "Reference Types" are supported.
- 6 Click **Insert**.
- 7 Click **Close**.

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](#)".

Using a cross-reference

For a destination within the same document, the target of the cross-reference link is displayed or scrolled into view.

For a destination within a Quark XML Document, the document is opened and the target of the cross-reference link is displayed or scrolled into view.

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

Deleting a cross-reference

Cross-references are easy to delete from the word or phrase to which it was added.

To delete a cross-reference:

- 1 Right-click on the desired cross-reference.
The context menu is displayed.
- 2 In the context menu, choose **Remove Hyperlink**.
The cross-reference link is removed from the word or phrase.

Working with page layout

The Working with Page Layout section provides details on all page layout-related features and capabilities found in Quark XML Author.

About pagination

Microsoft® Word inserts an automatic page break when a page is filled with content. A new page is started. If you want a piece of content such as a graphic or section to start at the beginning of a page, you can insert a manual page break.

You can exert some control over where automatic page breaks are inserted by using the **Keep With Next** and **Widow / Orphan** features.

Inserting page breaks

You can easily insert page breaks between two elements on the Microsoft® Word canvas.

To insert a page break:

- 1 Position the cursor where you want to insert the break.
- 2 Click **Insert** ribbon > **Page Break**.

The break is inserted.

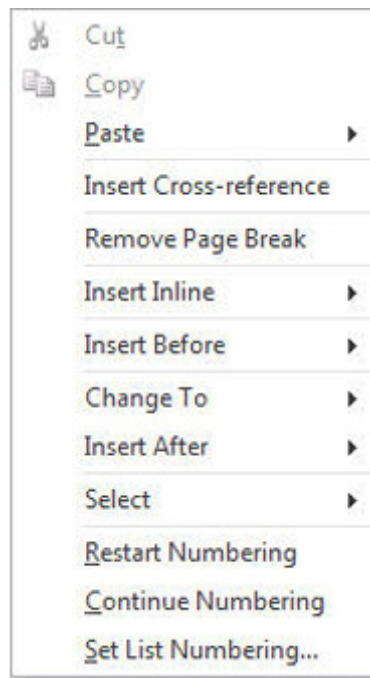
- ➡ If the current view is the **Print Layout** view, the window is scrolled to the top of the next page.

Deleting page breaks

You can easily delete page breaks from the Microsoft® Word canvas.

To delete a page break:

- 1 Navigate to the first element on the page following the break.
- 2 Right-click on that element.



- 3 In the context menu, choose **Remove Page Break**.

The break is deleted.

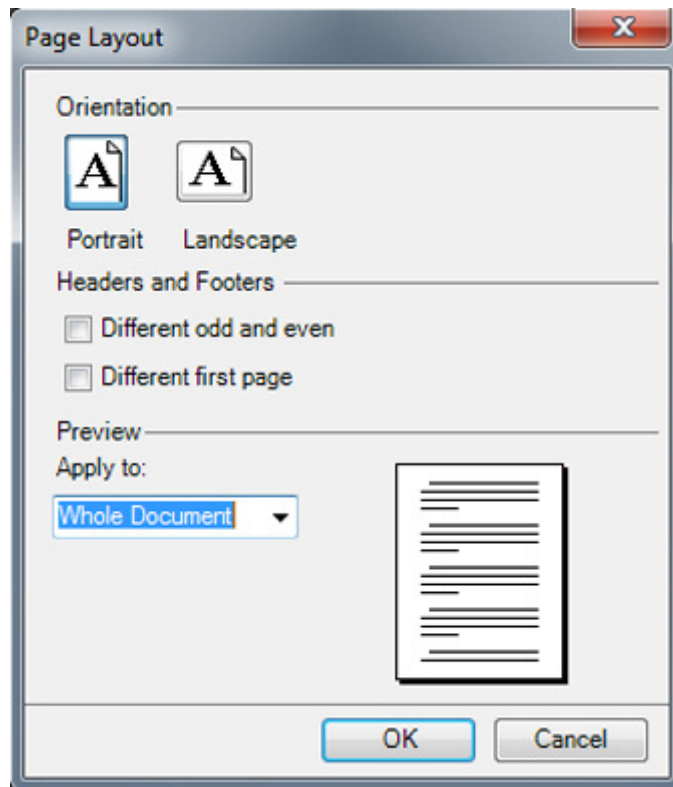
Setting page orientation

You can apply portrait or landscape orientation to all pages in a document.

To set the page orientation:

- 1 Click **View** ribbon. In the **Page Layout** group, click the **Page Setup** button in the lower right corner.

The **Page Layout** dialog is displayed.



2 In the **Page Layout** dialog, click one of the following orientations:

- **Portrait**
- **Landscape**

3 Check the desired **Headers and Footers** option. The options that are available may vary and are often customized.

4 In **Apply to**, choose **Whole document**.

➡ If there are no document-sections in the document, then this is the only choice.

The selected **Orientation** setting is applied to all pages in the document.

About document-sections

The Section Break feature is similar to the Section Break feature in Microsoft® Word. These sections are Word-specific sections rather than schema-specific Sections. Inserting or deleting a Word-specific section has no effect on schema-specific Sections.

Inserting document-section breaks

Document sections may be added at almost any location in the document.

To insert a section break:

- 1 Position the cursor where you want to insert the break.
- 2 Click **View** ribbon > **Breaks**. Under **Section Breaks**, choose **Next Page**, to start the new section on the next page or choose **Continuous** to start the new section on the same page.

The break is inserted.

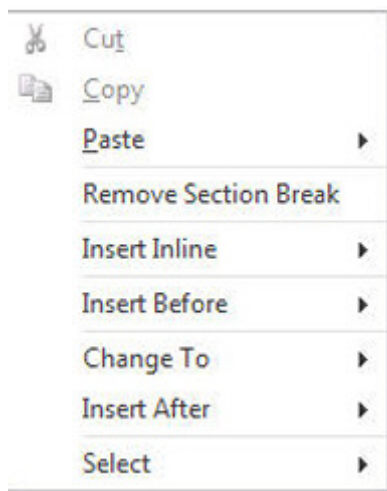
- ➔ If the current view is the **Draft** view, the section break is displayed on the Microsoft® Word canvas.
- ➔ If the current view is the **Print Layout** view, the window is scrolled to the top of the next page.

Deleting document-section breaks

You can easily delete document-section breaks from the Microsoft® Word canvas.

To delete a document-section break:

- 1 Navigate to the first element on the page following the break.
- 2 Right-click on that element.



- 3 In the context menu, choose **Remove Section Break**.

The break is deleted.

Setting document-section orientation

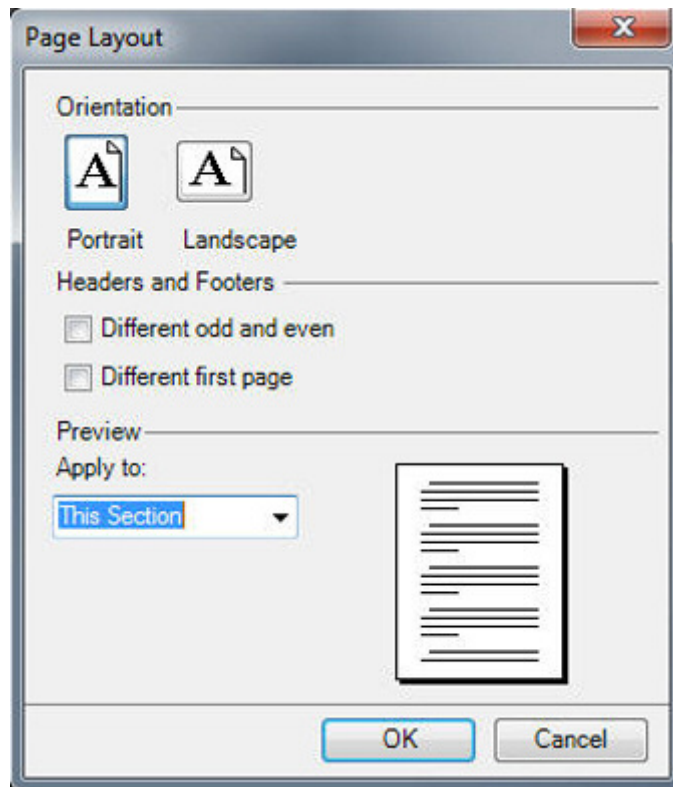
You can apply a portrait or landscape orientation to each document-section.

The document must already contain document-sections.

To set the orientation of a document-section:

- 1 Place the cursor within the desired document-section.
- 2 Click **View** ribbon. In the **Page Layout** group, click the **Page Setup** button in the lower right corner.

The **Page Layout** dialog is displayed.



- 3 In the **Page Layout** dialog, click one of the following orientations:
 - **Portrait**
 - **Landscape**
- 4 Check the desired **Headers and Footers** options. The options that are available may vary and are often customized.
- 5 In **Apply to**, choose **This Section**.

The selected **Orientation** setting is applied to all pages in the section.

About keep with next

If you want to prevent Microsoft® Word from inserting an automatic page break between two pieces of content, you can tie the two pieces together using the **Keep With Next** setting.

This feature can be used on two paragraphs, two lists, or a list and a paragraph. For example, a paragraph followed by a list. Instead of Microsoft® Word inserting an automatic page break between the two pieces, the break is inserted before the first piece. The paragraph and the list are displayed at the top of the next page. Within tables, this feature may be applied to table rows only.

Using the keep with next setting

The **Keep With Next** setting is used to prevent Microsoft® Word from inserting an automatic page break between two pieces of content. The feature is applied to the first of the two pieces of content.

This feature will work on a selection that includes more than two elements, however, the setting is still applied to the individual elements not the selection as a whole.

To toggle the **Keep With Next** setting:

- 1 Select the desired elements.
- 2 Click **View** ribbon > **Keep With Next**

The setting is toggled for the selected elements.

About widow/orphan

If you want to prevent Microsoft® Word from creating widow and orphan lines when displaying a paragraph, use the paragraph's Widow/Orphan setting.

By definition, if a paragraph extends past the end of a page such that the last line of the paragraph is the only line displayed on the next page, then that line is known as a "widow" line.

By definition, if a paragraph extends past the end of a page such that the first line of the paragraph is the only line displayed at the bottom of the page, then that line is known as an "orphan" line.

Using the widow/orphan setting

To specify whether or not a paragraph is allowed to have widow and orphan lines, use the paragraph's Widow/Orphan setting.

To toggle the Widow/Orphan setting:

- 1 Position the cursor in the desired paragraph.
- 2 Click **View** ribbon > **Widow/Orphan control**.

The setting is toggled for the selected paragraph.

➡ This setting is *On* by default.

About columns

Quark XML Author supports the Columns feature.

Each section in a document can have a different column specification and arrangement. The document-section owns the columns. Therefore, if you want a location that is in the middle of a section to have a different number of columns or column characteristics, then a new section is needed. Quark XML Author inserts the new section automatically

Inserting columns

The Insert Column feature is used to perform a simple insertion of columns in the middle of a document-section. A new document-section is automatically inserted. For more advanced column insertions, see "[Modifying columns](#)".

To insert columns:

- 1 Place the cursor in the element preceding the element where you would like to insert columns in the document section.
- 2 Click **View ribbon > Columns**, then click the button that represents the desired number of columns: **One**, **Two**, or **Three**.

A new document-section and the column(s) are inserted. The new column designation is applied beginning from the element following the element the cursor was located in and continuing to the end of the document section.

Modifying columns

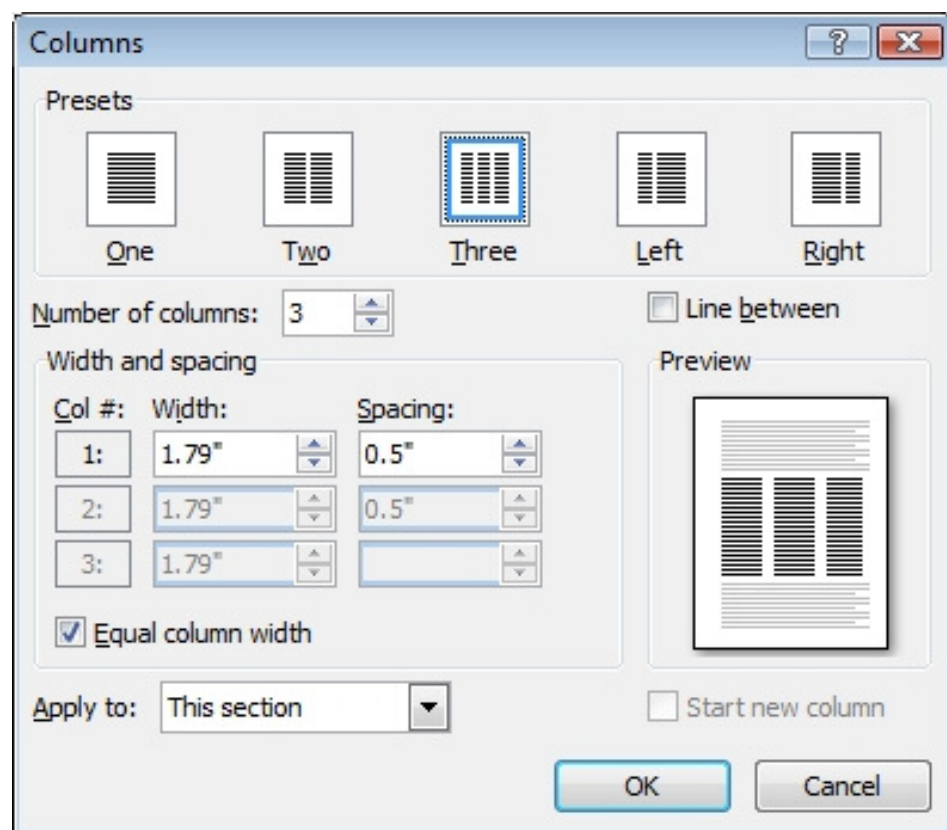
The Column Modify feature is used to modify the characteristics of existing columns or to change the number of columns.

To modify columns:

- 1 Place the cursor in the document, see Step 7 for guidance on where to place your cursor.
- 2 Click **View ribbon > Columns > More Columns**.

The **Columns** dialog is displayed.

- 3 To use a preset configuration, select one of the **Presets**.



- 4 To specify a custom column configuration, specify the **Number of columns**.
- 5 To display a vertical line between each column, check **Line between**.
- 6 For each column, specify the **Width** and **Spacing**.
- 7 From the **Apply to** drop-down menu, choose whether the specified settings should be applied to **This section**, **This point forward**, or to the **Whole document**.

- To make modifications to the current document section, place the cursor in any element of the current document section and choose **This section**.
- To make the modifications from one location to the end of the document, place the cursor in the element preceding the element where you want the column modification to start and choose **This point forward**.
- To make modifications for the entire document, place the cursor in any element of the document and choose **Whole document**.

8 Click **OK**.

The columns are modified to the new settings. Columns are added or subtracted to reflect any adjustment to the number of columns.

Inserting column breaks

Quark XML Author supports column breaks. You may insert column breaks that act similarly to a page break, but within the scope of columns. For example, given three columns, inserting a column break in the middle of column two will move the remainder of column two to the beginning of column three. Any content in column three may be pushed onto the next page.

To insert a column break:

- 1 Place the cursor in the element before the element where you want to insert the column break.
- 2 Click **View ribbon > Breaks > Column**.

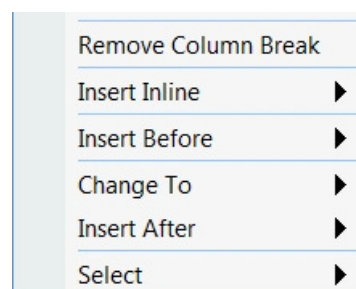
The column break is inserted. Content contained in the element after the current element is moved to the next column.

Deleting column breaks

You can easily delete column breaks from the Microsoft® Word canvas.

To delete a column break:

- 1 Navigate to the first element on the page following the break.
- 2 Right-click on that element.



- 3 In the context menu, choose **Remove Column Break**.

The break is 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 document 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 document attributes

You can add, edit, and delete attribute values for documents with the **Attribute** panel.

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

To add attribute values:

- 1 Use one of the following methods:
 - Click **File > Document Attributes**.
 - Double-click on the header.
- 2 In **Audience**, specify whether the audience is **Internal** to the organization or **External**.
- 3 In **Importance**, select the importance level of the content.
- 4 In **Publishing Intent**, specify if the content is for a specific publishing intent (such as **Web**) or for **All intents**.
- 5 In **Language**, select the native language of the content.
- 6 Click **OK**.

The attribute values you specified are added to the document.

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 content references

The Working with Content References section provides details on all reference-related features and capabilities found in Quark XML Author.

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 document components such as paragraphs, lists, and pictures. Each time the document 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 document. 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 references

Content references are inserted on the Word canvas.

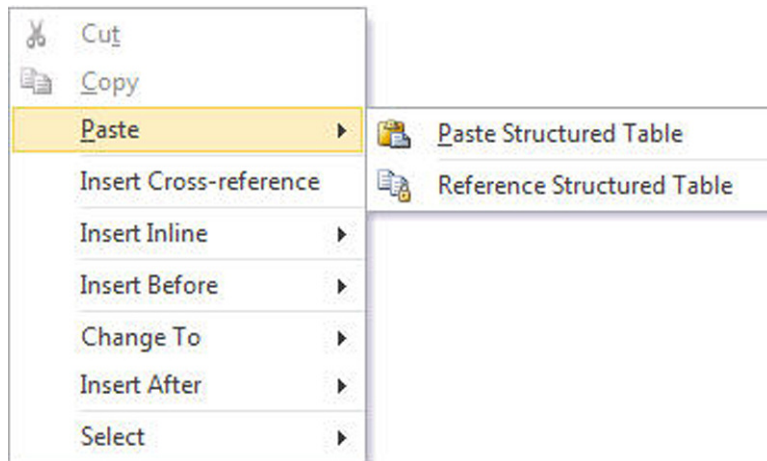
This feature applies to referencing content such as tables, figures, images, lists and paragraphs. This feature does not apply to referencing sections or documents. To insert sections or documents, see [“Inserting section references”](#)

To insert a content reference:

- 1 Open the source document that contains the content that you want to reference.
 In Quark XML Author, if you have made any changes to the source document, the document must be saved to a file or checked in to a repository before a reference can be created. This action creates IDs for the content elements which allow them to be referenced.
- 2 In the source document, locate the desired native content.

WORKING WITH CONTENT REFERENCES

- 3 Right-click on the content.
- 4 In the context menu, choose **Select**, the desired element, and then click **Copy**.
- 5 Open the destination document where you want to insert the content reference.
- 6 In the destination document, 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.

Content component references and the FileNet repository

Sections are made reusable on the Word canvas.

You can reference a section (see "[About section references](#)") or entire documents that have been saved to the repository.

To make a section reusable:

- 1 Right-click on the desired section.
- 2 In the context menu, choose **Select**.
- 3 Click **Section #** for the section you want to make reusable.
- 4 Click **Create Component**.
- 5 Specify whether to check the file in as a **Major Version** or **Minor Version**.
- 6 Navigate to the repository folder where you want to save the section.
- 7 Specify the filename.
- 8 In **More Options > Title**, specify the title that is to be displayed in the repository view.
- 9 Click **Save**.

The section is saved to the repository and is reusable.

To reuse the section, see "[Inserting section references](#)".

About section references

You can insert the content of a reusable section or repository document by inserting a section reference. The content within the reusable section or repository document will be inserted as a section. And similar to other content references, the content is read-only and displays a shaded background. These can be inserted at any location within a document that allows sections.

Inserting section references

Section references are inserted on the Word canvas.

You can insert a reference to a section or to an entire document that has been saved to the repository.

To insert a section reference:

- 1 Position the cursor where you want to insert the reference.
 - 2 Right-click and from the context menu choose the command that will insert the section reference at the desired level. For example:
 - **Section 2 from server**
 - **Document Styles > Section 1 from server**
 - 3 In the **Reference from Server** dialog box, navigate to the repository folder that contains the desired content.
 - 4 Or, in the dialog box, use the search feature to locate the desired content.
 - 5 Click on the file that contains that content.
 - 6 Click **OK**.
- ➡ The section reference is inserted. A read-only copy of the referenced content is displayed with a shaded background.

Copying content references

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

To copy a content reference:

- 1 Open the source document that contains the content reference that you want to copy.
- 2 In this document, 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 document where you want to insert the copied content reference.
- 6 In the destination document, place the cursor where you want to insert the content 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 document 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 document, the document must be saved to a file or checked in to a repository before this task may be performed.
- 2 In this document, 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 document where you want to replace the content reference.
- 6 In the destination document, 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 document that contains the content reference that you want to refresh.
- ➡ In Quark XML Author, if you have made any changes to the source document, the document 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 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 document is checked in, any local references which are configured to be checked in with the main document will be converted to server references. These references will be checked in first and then will be related/referenced to the document on the server.

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.

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

Editing referenced sections inline

The source content of a reference may be edited from the link on the Word canvas. Referenced sections can be edited in the Word canvas of the document that contains the reference. This feature is a convenient alternative to opening and editing the referenced document where the content resides as local or native content

To edit referenced content:

- 1 Right-click on the content reference.
- 2 In the context menu, choose **Select > {element name} Edit Component (Inline)**.

The document containing the source content is opened in a separate document window.

The shaded background is removed. The content is ready for editing.

When you are finished editing, See “[Saving edited content references](#)” to save your changes to the repository.

Saving edited content references

To save referenced content that was edited inline:

- 1 Right-click on the edited content.
 - 2 In the context menu, choose **Select > {element name} > Save Component Changes**.
 - ➡ You can discard any changes made to the content by choosing **Revert Component Changes** at this time.
 - 3 In the **Save** dialog, adjust any of the options if desired.
See *"Saving a document"* for more information.
 - 4 Click **Save**.
- The content is saved to the repository. The content reverts from editable to read-only with a shaded background.

Viewing content references

A view of the content references in the current document 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 path or repository collection name where the referenced content resides.
- The content type of 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**



Smart

Document Pane

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**.

Quark XML Author for SharePoint BHO feature

The BHO feature provides users the ability to open Quark XML Author documents in XML Author from an Internet Explorer Web browser that has a SharePoint Site Collection opened in it.

The Quark Xml Author for SharePoint installer automatically installs a Web browser add-on: “Quark.CMSAdapters.SharePoint.BrowserHelper.BrowserHelper”, which is required for the feature to work.

The following steps must be taken to configure the BHO feature:

1. Make changes to the “Quark.CMSAdapters.SharePoint.BrowserHelper.dll.config” file.
2. Associate the XML Author document file extension with XML Author Startup.
3. Configure Internet Explorer.
4. Configure the SharePoint Server if the SharePoint class add-on is enabled on Internet Explorer.

Make changes to config file

All file extensions that are being used to save Quark XML Author documents to the SharePoint Server need to be added to the “Quark.CMSAdapters.SharePoint.BrowserHelper.dll.config” file.

By default, the “.xml” file extension is already present in the config file. All other XML Author document extensions that your system is configured with needs to be added to the file.

- 1 Open the “Quark.CMSAdapters.SharePoint.BrowserHelper.dll.config” file located in the application folder.
- 2 Add the comma separated file extension(s) to the key `BrowserSupportedFileExtensions`.

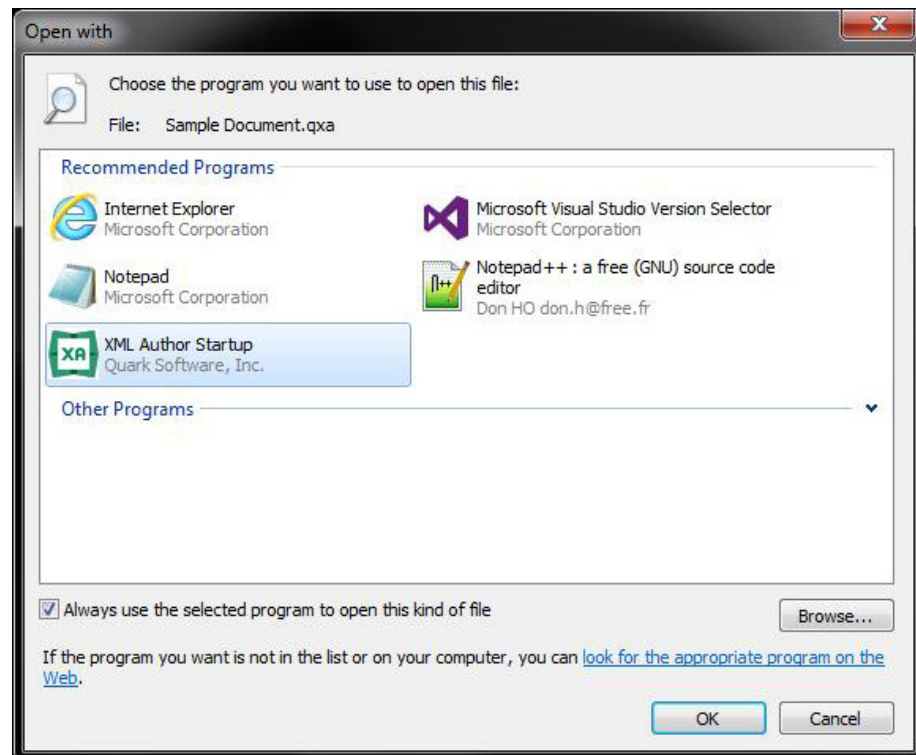
```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <appSettings>
    <add key="CheckOutLocation" value="%Userprofile%\Documents\Quark Software Inc.\Quark XML Author"/>
    <add key="BrowserSupportedFileExtensions" value=".xml,.qxa"/>
  </appSettings>
</configuration>
```

Associate Quark XML Author document file extension

All custom file extension(s) used for saving the XML Author documents to the Server must be associated with the XML Author Startup process in Internet Explorer.

To do this:

- 1 Create an XML author document with the custom file extension and save it on your local system.
- 2 Right click on the saved document and choose **Open With**.
- 3 Choose “XML Author StartUp” from the programs list and check



- 4 Click OK.

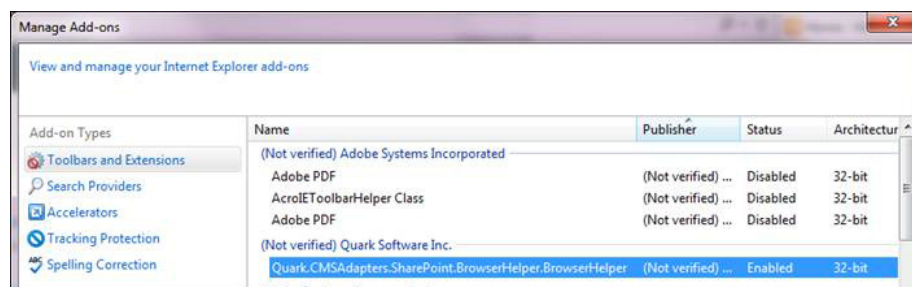
Configure Internet Explorer

When you install the Quark XML Author for SharePoint an add-on is added in Internet Explorer named “Quark.CMSAdapters.SharePoint.BrowserHelper.BrowserHelper”.

Enable the add-on:

- 1 Launch Internet Explorer and enable the Quark.CMSAdapters.SharePoint.BrowserHelper.BrowserHelper Add-

on.



- 2 Close all the open instances of Internet Explorer and launch it again.

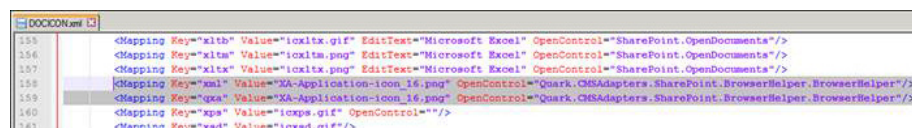
Configure the SharePoint server

If the SharePoint OpenDocument Class Add-on is enabled in your browser, then you need to configure the SharePoint server in order for the BHO feature to work correctly. If the following steps are not performed, then when you open a file from the browser, the call goes to the SharePoint OpenDocument Class Browser Add on, and the following dialog will display:

If you select **Read Only**, the BHO feature will work as expected. But if you select , the BHO feature will not work correctly. The document will be checked out, but will be opened for editing in Notepad.

- ➔ If the user is using SharePoint to store only QXA documents, you can disable the “SharePoint openDocument Class” web browser add-on, and the following steps are unnecessary, but If the user is using SharePoint to store both QXA documents and other types of documents, (docx, xlsx etc.), then perform the following steps.

- 1 Enable both the “Quark XML Author Web Browser”, and the “SharePoint OpenDocument Class” web browser add-ons.
- 2 Add the following highlighted entry for every XML Author File Extension in the “DOCICON.XML” file, located in the folder.

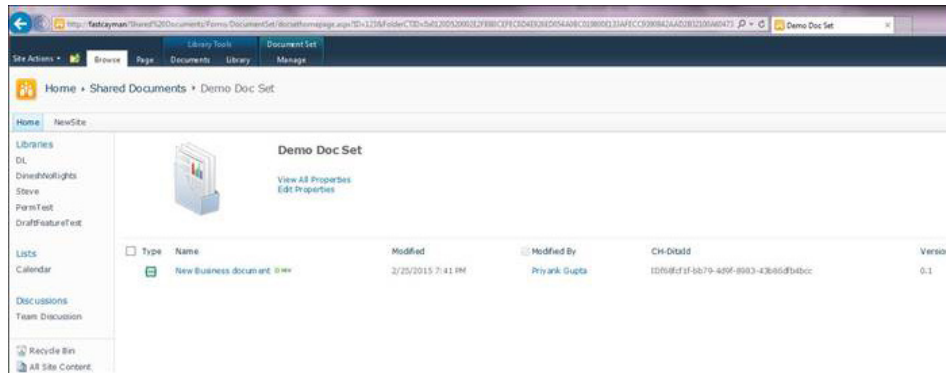


- 3 Restart the SharePoint Server.

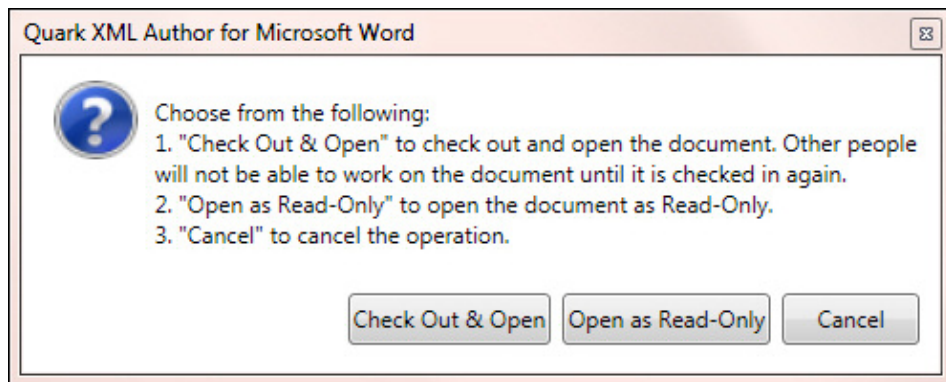
Working with the BHO feature

When configured correctly, the BHO feature will work in the following manner:

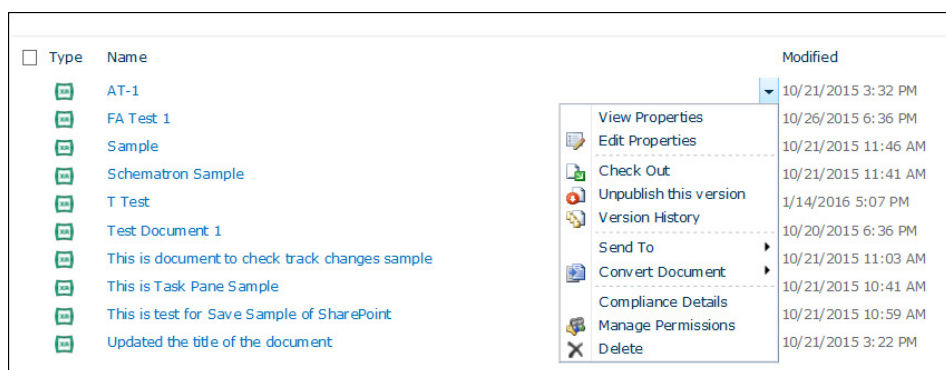
- You can open all XML Author documents from an Internet Explorer web browser just by clicking on the document.

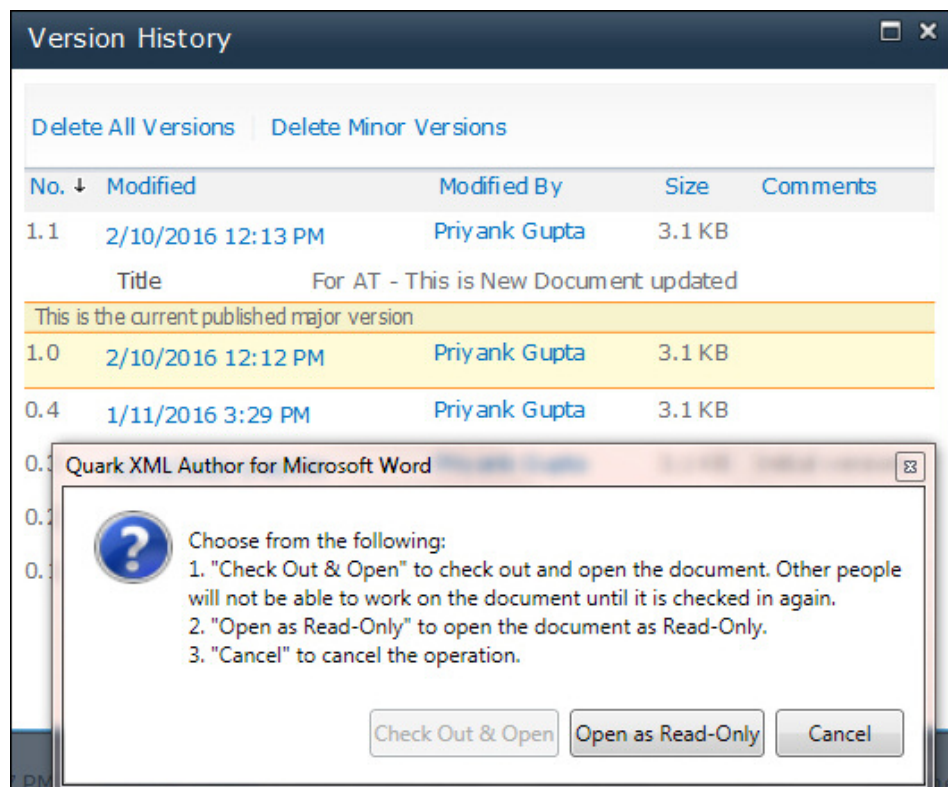


- If the document status is **Checked In** then on clicking on an asset in a web browser, the following dialog will display:

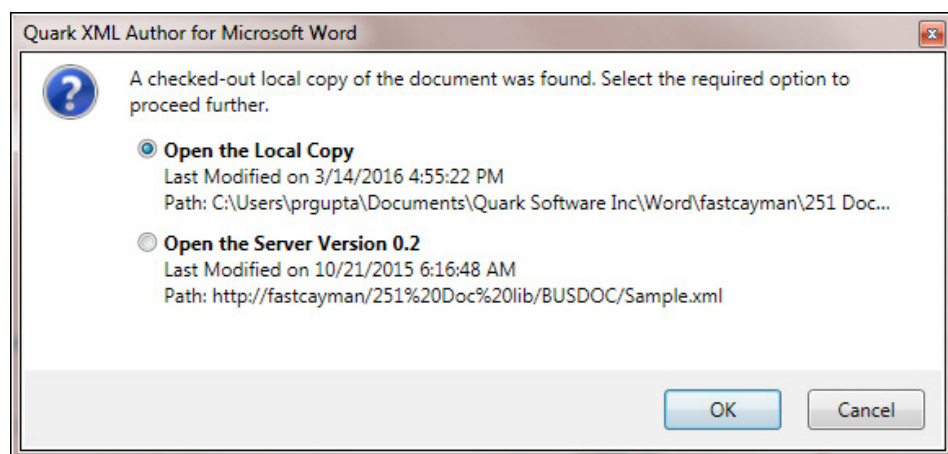


- If the document status is **Checked Out** and the checkout user is the same, then it will open the document directly for editing in Quark XML Author.
- If the document status is **Checked Out** and the checkout user is different then a dialog will display, informing the user that the asset has been checked out by another user .
- You can also open previous versions of the asset.





- If the document was checked out, updated and saved locally then when you click on that asset in a browser, the following dialog displays:



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**



Smart
Document Pane

ribbon, click **Smart Document Pane**.

The References tab

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

References tab

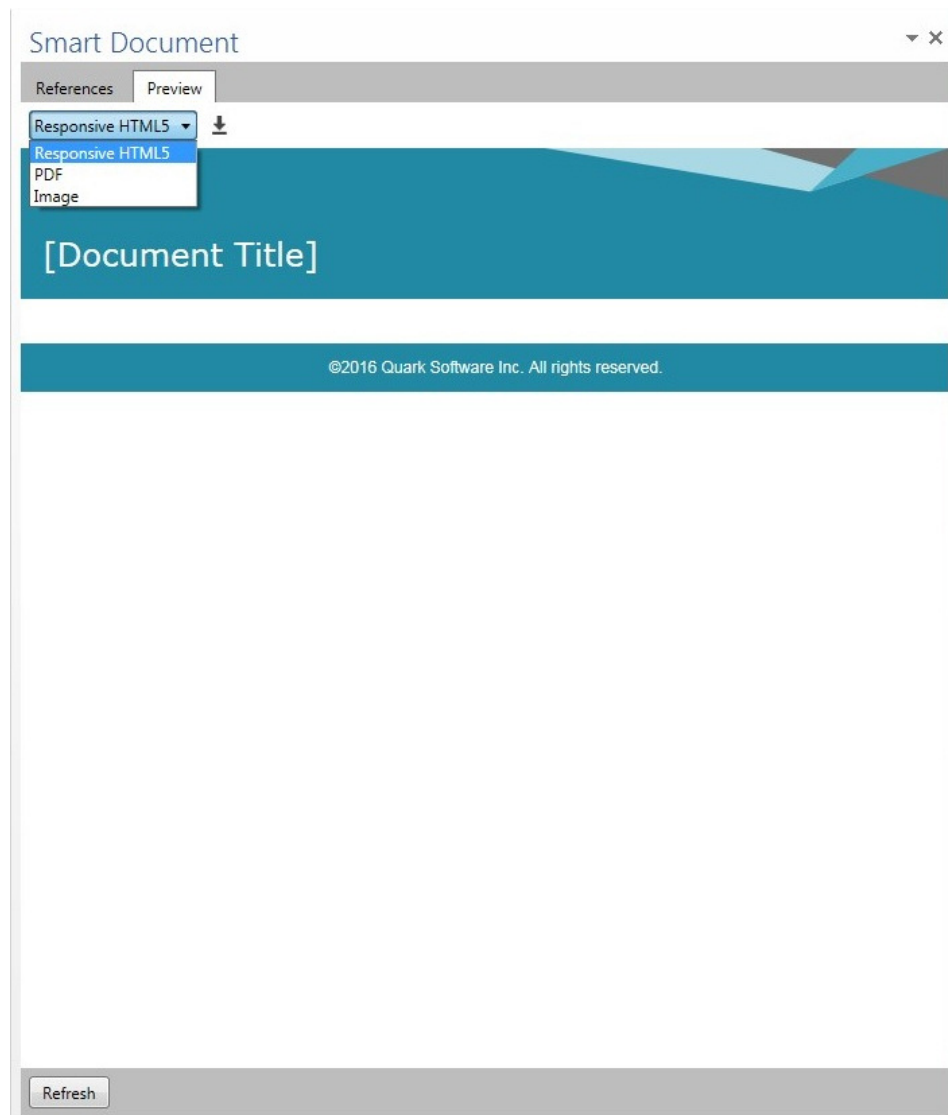
The **References** tab displays all local and server content references contained in the current document.

Smart Document							
References				Preview			
Name	Path	Type	Version	Last modified	Last modified by	Checked Out by	
Description.xml	/26 Doc Lib...	xml	1.0	2/11/2016 1:08:45...	System Account		
Section-2.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:20:49...	System Account		
Section-3.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:20:54...	System Account		
Section-4.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:00...	System Account		
Section-5.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:04...	System Account		
Section-6.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:09...	System Account		
Section-7.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:14...	System Account		
Section-8.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:19...	System Account		
Section-9.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:23...	System Account		
Section-10.xml	/26 Doc Lib...	xml	0.3	1/4/2016 11:21:28...	System Account		

Preview tab

The **Preview** tab allows you to preview the publication in any of the available publishing channel formats.

THE SMART DOCUMENT PANE



➡ You can publish individual documents 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

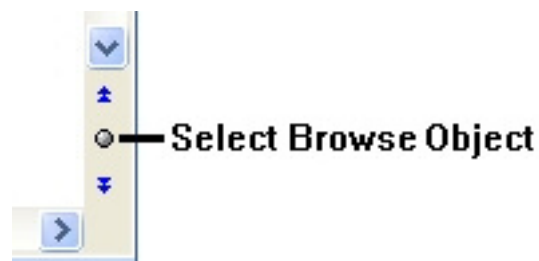
This feature is not available.

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

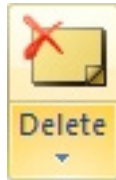
This feature is supported in Quark XML Author.

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.

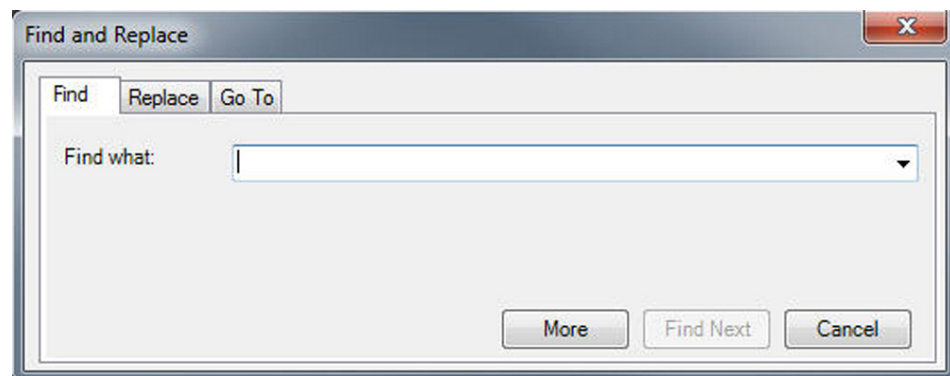


About find and replace

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

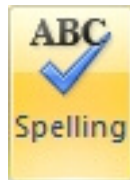
Quark XML Author's Page Setup feature is used to specify page orientation and layout settings specific to XML Author documents. Word's Orientation and Page Setup features are not XML aware and therefore should not be used.

About spelling checker

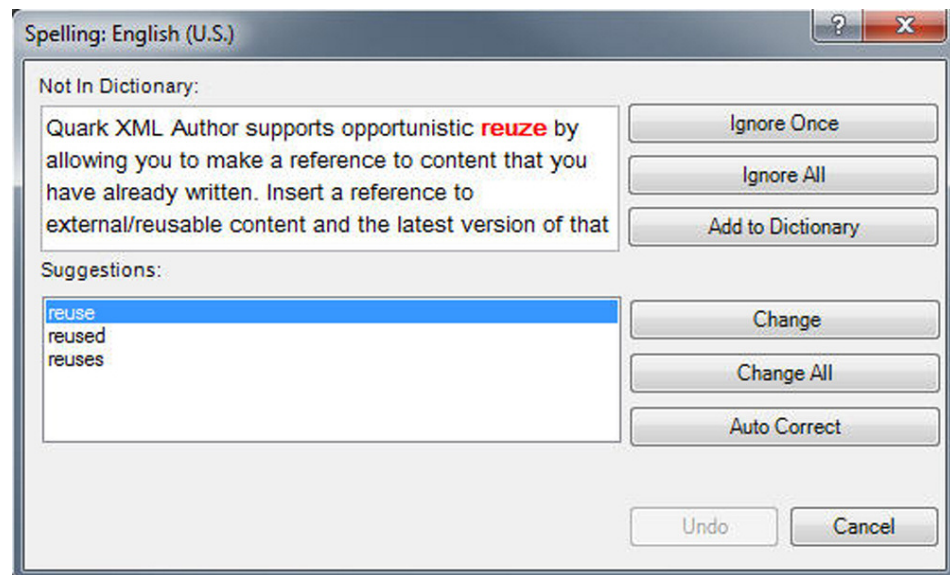
Quark XML Author supports Microsoft Word's Spelling feature and acts the same way, with one exception. Quark XML Author does not spell check or modify read-only elements such as element labels or content that is displayed as part of a content reference. You may only modify text via spell check if the 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.

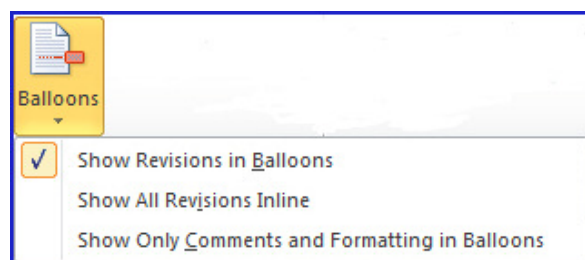


About track changes

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.

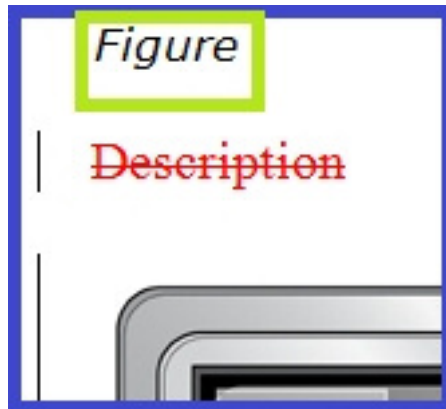
- ➔ Choose whether to display revisions in balloons or inline using the **Balloons** drop-down menu in the **Tracking** section of the **Review** ribbon.



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.

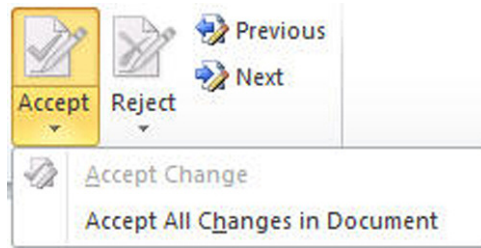
Within tables, changes to text are tracked, but structural changes are not. For example, the following are not tracked: delete table, delete row, delete column, insert row, split cell and merge cells.

For Word Tables, the **Track Changes** feature supports the tracking of inserted and deleted Word Tables within a Quark XML Author document.

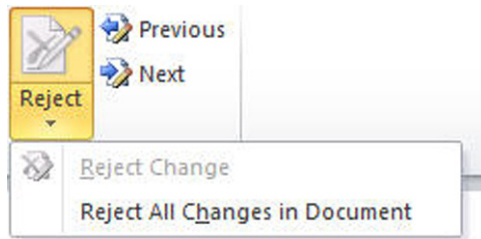
Differences

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.



Viewing the Revisions pane

A list of revisions in your document can be displayed in the **Revisions** pane.

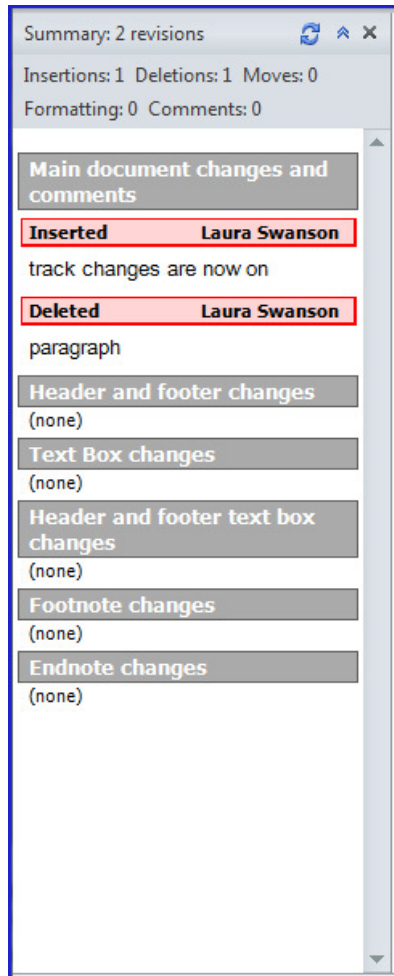
To view the **Revisions** pane:

- 1 In the **Review** ribbon, click **Reviewing Pane**.



- 2 Choose **Reviewing Pane Vertical** or **Reviewing Pane Horizontal** from the drop-down menu.

The **Revisions** pane is displayed.



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.
 - Responsive HTML5
 - PDF
 - Image

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 documents from Quark XML Author. The document 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.
 - App Studio Article
 - ➡ Creates high-end, rich design for multi media as an article for inclusion in an App Studio issue.
 - App Studio Package
 - ➡ Creates high-end, rich design for multi media as an App Studio issue.
 - QuarkXPress project
 - ➡ Creates a QuarkXPress project including all component files and dependencies. Requires QuarkXPress application to view.
 - Collect for Output
- ➡ Asset metadata can be configured to be shown in the live preview.

Publish a document

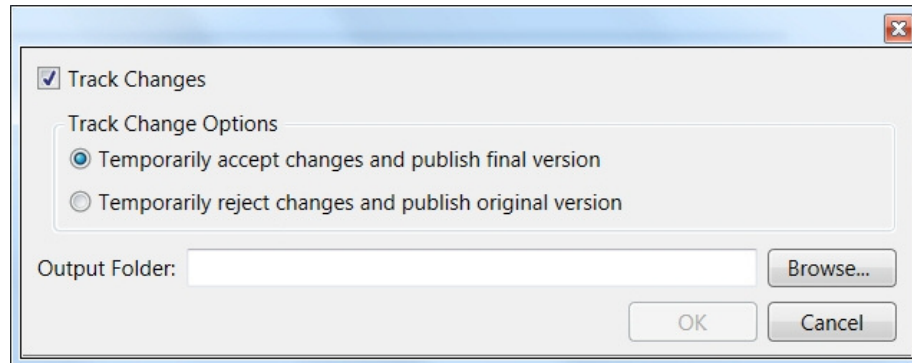
To publish a document:

- 1 Click **File > Save & Send > Publish**.
- 2 In the **Publish** menu, select one of the following formats:
 - PDF
 - HTML
 - App Studio Article
 - App Studio Package
 - QuarkXPress project

- Collect for Output

- 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 document is published in the selected format to the specified folder.

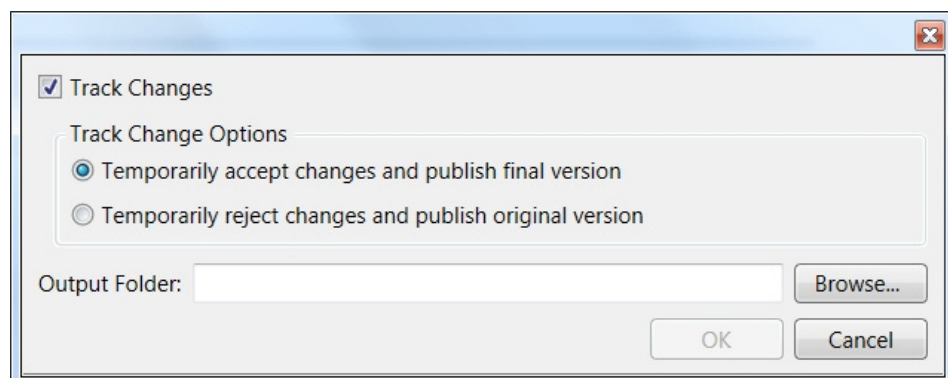
Publish the preview

You can publish individual documents from the **Preview** tab.

To publish a document:

- 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**.

ABOUT PUBLISHING

The document 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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