

QuarkEd™

for QuarkXPress™

QuarkEd for QuarkXPress **Module 2: QuarkXPress Essentials**

The choice for publishing software worldwide

Acknowledgments

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This manual was authored entirely with QuarkXPress and Quark Publishing System™ (QPS™). QuarkXPress authoring documents were converted to Portable Document Format (PDF) using Adobe® Acrobat® Reader.

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Introduction

Using these Materials

The QuarkEd for QuarkXPress lessons contain a minimum of text so you can concentrate on *doing* rather than on *reading*. However, enough information is included so that after you complete the lessons, you can try out the exercises on your own using the text and the accompanying CD-ROM.

Each lesson starts with a new file that includes all the necessary elements from the previous lessons, so if you delete or change elements in one lesson, you won't miss anything in another lesson.

 Getting Started

QuarkEd for QuarkXPress has two parts: the instruction documents containing the lessons and the sample electronic files necessary to complete the lessons. The files for both parts are on the QuarkEd CD-ROM.

About the modules

If you're new to QuarkXPress, start with *Module 1: QuarkXPress Fundamentals*. This module contains four lessons that give you an opportunity to work with text, pictures, and other QuarkXPress elements as you complete a simple document and prepare it for printing. When you finish these lessons, you'll have covered all the information you need to create your own QuarkXPress project.

If you've used QuarkXPress before, skim through Module 1 to make sure you're familiar with the information, then proceed to *Module 2: QuarkXPress Essentials*. This module contains eight lessons that teach you how to construct documents, work with color, format text with style sheets, fine-tune typography, combine type and graphics, prepare documents for high-resolution printing, and other topics. The lessons in this book will help you work more efficiently and productively in QuarkXPress.

If you're already proficient in QuarkXPress — or have completed Modules 1 and 2 — you may want to explore *Module 3: Advanced Techniques*. This module contains six lessons that teach you how to use QuarkXPress as an illustration tool, how to increase your productivity in QuarkXPress, and how to publish long documents using the books, lists (table of contents), and indexing features.

About the lessons

The modules are divided into individual lessons, which build on information learned in previous lessons. However, you do not need to complete all the lessons. You may choose the lessons relevant to you and skip others.

Each lesson is divided into two sections: "The Steps" and "The Details." "The Steps" section presents a series of tasks that make up the hands-on portion of a lesson. Tasks don't contain a lot of text, but provide the information you need to complete a lesson and serve as a "how-to guide" after class. Each section of steps ends with a "Checkpoint" page that suggests various ways to check your skills, and presents additional ideas for further exploration.

"The Details" contain the reference section of a lesson. Included is in-depth information related to topics covered in "The Steps." This is a great place to start when you want to learn more about a particular topic or feature.

Other reference books

Another source of information is the documentation that comes with the QuarkXPress software. The documentation includes a complete user guide, *A Guide to QuarkXPress*; a tutorial, *A Preview to QuarkXPress*; and various other booklets and electronic files.



Printing modules and lessons: The QuarkEd for QuarkXPress instruction documents are in the form of Adobe Acrobat files on the CD-ROM. Once you've determined which modules and lessons are appropriate, you can print those portions from the Acrobat Reader.

Conventions

What's ahead

Each lesson begins with a brief overview of what you'll learn. When applicable, a finished version of the lesson file is included so you can open it to see where you're heading.

Lessons and tasks

Lessons are made up of individual tasks that cover a concept, procedure, or feature. Individual tasks are made up of a series of numbered steps that are divided into two parts — the *what you'll do* part includes minimal details in bold type face; the *how you'll do it* part lists specific details and tools you'll need to complete the step (in plain type face). *What you'll do* appears on the first line of a numbered step; how you'll do it appears on subsequent lines.

For example:

- 1** **Copy the picture box on page 1:** Using the Item tool , click to select the picture box containing the "Color Pastels.tif" picture file.

Choose **Edit** → **Copy**.

Menu paths

Menu paths are indicated by arrows →. For example, the following instruction asks you to open the **Print** dialog box by choosing the **Print** command from the **File** menu:

Choose **File** → **Print** to open the Print dialog box.

Information you enter

Information you need to type appears in a typewriter type font. For example:

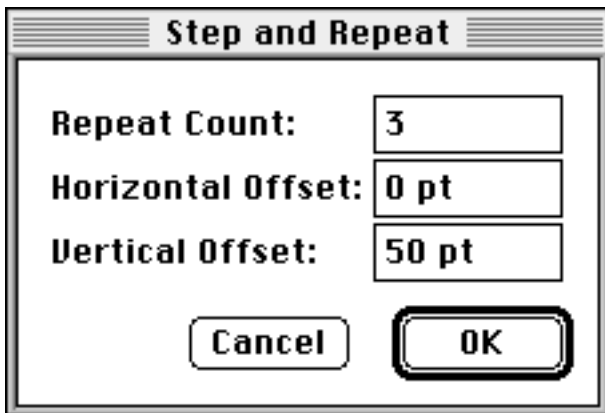
Using the Content tool , click to select the text box; then type `color`.

Screen captures and tables

Screen captures are often used to provide visual examples or avoid unnecessary explanatory text. Tables sometimes accompany or replace screen captures so you can quickly check settings as you perform a task.

In the following example, you have a screen capture for a visual reference, along with a table showing the exact settings you need to make:

Choose **Item** → **Step and Repeat** to open the **Step and Repeat** dialog box:



The **Step and Repeat** dialog box lets you specify the number of copies QuarkXPress makes of an active item, and how far the copies are offset horizontally and vertically from the original and each other.

Enter these settings, then click **OK**:

Field	Setting
Repeat Count	3
Horizontal Offset	0 pt
Vertical Offset	50 pt

Tips, keyboard commands, and notes

The sidebar contains tips relating to a task, as well as keyboard commands used on that particular page.

Tips

Tips include information that's helpful or useful, but may not directly affect your performance of a task. Tips often provide background information or suggest an easier or more efficient way to accomplish a particular function.

For example:



Moving the Tool palette: By default, the Tool palette appears to the left of the document window, but it can be moved by dragging the shaded bar at the top of the palette.

Keyboard commands

Keyboard commands list a key or combination of keys that you can press to perform a particular function without using your mouse. The keyboard commands immediately follow each task's instructions.

For example:

**Keyboard Commands for Mac OS:**

Print⌘+P

**Keyboard Commands for Windows:**

Print CTRL+P

When keyboard commands appear in text, they are listed with Mac OS commands first, followed by Windows commands and separated by a slash.

For example:

To make the document window update as you scroll, press Option/ALT while dragging the scroll box.

The following symbols are commonly used to represent particular keys on Mac OS:

- Command key: ⌘
- Option key: ⌥
- Shift key: ⇧
- Control key: ⌞

Notes

Notes appear in the main body of text because they contain information that can have a direct impact on your understanding of a task or its outcome.

For example:



If you import a picture into a box that already contains a picture, the existing picture will be replaced by the new one.



Saving while performing lessons: Each lesson in QuarkEd directs you to create or to open a file, then name and save it. Steps in the lessons do not instruct you to save thereafter — you should save as often as you normally would while working on a computer. This means save often.

 Setting Up

Before starting QuarkEd, be sure QuarkXPress, the appropriate fonts, and the necessary lesson files are on your machine.

QuarkXPress software

There are a few things to check inside your QuarkXPress program folder before getting started.

First, locate the file called XPress Preferences (Mac OS) or XPRESS.PRF (Windows). The XPress Preferences file stores default settings that dictate how various QuarkXPress features work — and therefore may affect steps in the QuarkEd lessons. If you're working with a new copy of QuarkXPress, the preferences will contain the Quark-specified defaults and you will not need to worry about it. If this is a working copy of QuarkXPress used in a publishing environment, the XPress Preferences may contain hours worth of modifications. If you suspect that is the case, place the file in a separate folder for the duration of the lessons. When you launch QuarkXPress, it will create a new “factory” preferences that you can use to complete the lessons.

The second thing to check is the “XTension” folder within your QuarkXPress folder. XTensions are files that expand the capabilities of QuarkXPress by adding features, menu commands, tools, etc. Make sure the following files are in the XTension folder: Cool Blends™, JPEG Import, LZW Import, XPress Tags Filter. Check the “XTension Disabled” folder for any missing files.

Fonts

To simplify font issues, the Mac OS sample documents contain only Helvetica and Times fonts; the Windows sample documents contain Arial and Times New Roman fonts.

Lesson files

The lesson files are in folders labeled “Module 1,” “Module 2,” and “Module 3.” Drag the appropriate module’s folders to your hard drive. If space is limited, copy one module at a time, or copy only the files for the lessons within each module that you intend to complete. Each module’s folder contains a “Student Files” folder for you to store files in while you’re working. You can delete these files when you finish a module.



Launching QuarkXPress: It might be helpful to create an alias or shortcut for QuarkXPress so you can use a desktop icon to easily launch the program.



Working with a demonstration version: If you do not own QuarkXPress, the QuarkEd CD-ROM provides a demonstration version of the software that you can use to complete the lessons. However, you cannot save files with the demonstration version, so you should skip over those steps in the lessons.

1

Constructing Documents

The Steps

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1

Constructing Documents

What's Ahead

Once you've got a basic layout for a project in mind, you're ready to start creating a document in QuarkXPress. For any multipage publication like a 10-page brochure, chances are the page design follows a grid. Maybe each page always has two columns, a rule, and the company logo. In QuarkXPress, you use master pages to contain these common page elements. Then you insert pages based on the master pages, flow in text, and add page-specific graphics.

In this lesson you'll create master pages for the "Features Brochure," then add basic text and rearrange pages. To see the finished document, which contains additional elements and formatting, open "Features.qxt" in the Lesson 1 folder inside the "Module 2" folder.

Creating a New Document

When you create a new document, usually you'll specify the exact page size of the printed piece. In this task you'll set up a new document that meets the specifications of the Features Brochure.



Keyboard Commands for Mac OS:

New Document⌘+N
Save as⌘+⇧+S



Keyboard Commands for Windows:

New Document CTRL+N
Save as CTRL+ALT+S

1 **Start a new document and specify the page size:** If necessary, launch QuarkXPress. Choose **File → New → Document**. In the **Page** area, choose **US Letter** from the **Size** menu.

2 **Set up the columns and margins to create guides on the pages:** In the **Column Guides** area, enter **2** in the **Columns** field and **.167** in the **Gutter Width** field.

In the **Margin Guides** area, check **Facing Pages**. Enter the following values in the fields: **Top .5**, **Bottom 1**, **Inside .5**, **Outside 2.75**. Check **Automatic Text Box**.

New Document

Page
 Size: **US Letter** ▼
 Width: **8.5"**
 Height: **11"**
 Orientation:

Margin Guides
 Top: **0.5"**
 Bottom: **1"**
 Inside: **0.5"**
 Outside: **2.75"**
☒ **Facing Pages**

Column Guides
 Columns: **2**
 Gutter Width: **0.167"**

☒ **Automatic Text Box**

Cancel **OK**

The **New Document** dialog box lets you specify the page size, margins, and number of columns in a new document.

3 **Create and save the new document:** Click **OK** to display the new document. Choose **File** → **Save as**. Create a “Student Files” folder and enter a descriptive name like “My Brochure.qxd.” (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

Specifying a measurement system for values: Although the values in the **New Document** dialog box display in inches by default, don’t think you’re stuck with them. You can enter measurements in these fields using any supported measurement system. Simply enter one of the following abbreviations with the value: inches or inches decimal ("), picas (p), points (pt), millimeters (mm), centimeters (cm), ciceros (c), and agates (ag). QuarkXPress converts the value to the default measurement system for you. You can use this technique of entering values with different abbreviations in any field in QuarkXPress.

Setting Preferences

Before you start working on a project, you should confirm all the settings in the **Document Preferences** dialog box. The preferences in the **General** tab control the way layout features like rulers and guides work. In this task you'll set preferences to make working with the Features Brochure easier.



Keyboard Commands for Mac OS:

Document Preferences⌘+Y

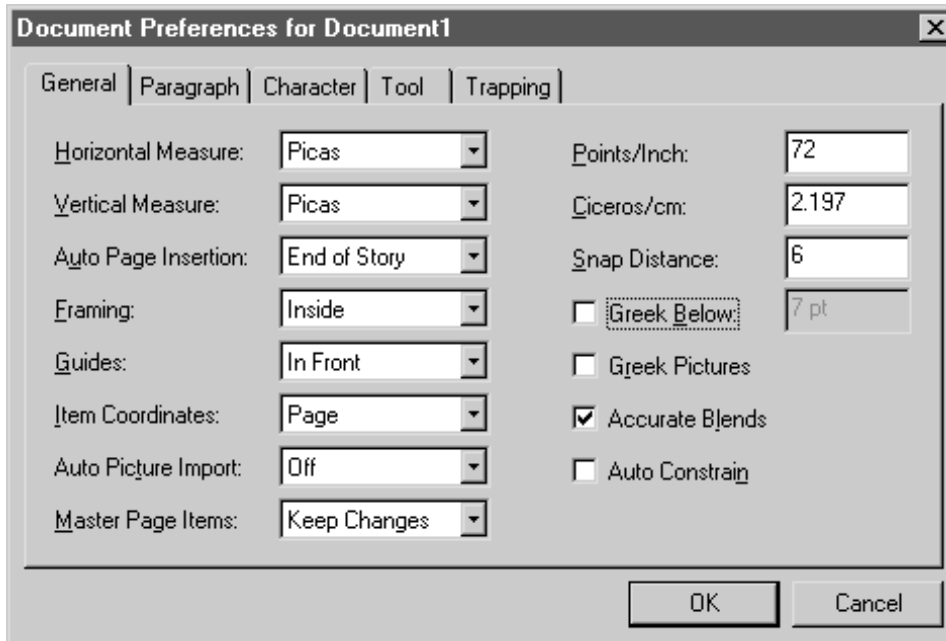


Keyboard Commands for Windows:

Document Preferences CTRL+Y

- 1** | **Open the Document Preferences dialog box:** Choose **Edit → Preferences → Document**; this displays the **General** tab.
- 2** | **Change the measurement system:** Choose **Picas** from the **Horizontal Measure** and **Vertical Measure** menus.
- 3** | **Confirm that automatic page insertion is on:** Make sure **End of Story** is chosen from the **Auto Page Insertion** menu.

- 4 Turn off Greek Below so all the text in the brochure displays:** Greeking speeds up text redraw by displaying smaller text as gray bars. Since most of the essential text in this brochure is fairly small, uncheck **Greek Below**.



The **Document Preferences** dialog box lets you control the default behavior of **General** controls for document construction.

- 5 Close the Document Preferences dialog box:** Click **OK** to save these changes with the document. Notice the measurement units on the rulers have changed.



Changing preferences globally: If you change **Document Preferences** when no documents are open, the changes are saved with the application and affect all new documents. For example, you might want to change the default measurement system from inches to picas. If you change **Document Preferences** when a document is open, the changes are saved only with the active document.

Formatting Master Pages

You can place common page elements on master pages, then use those master pages to automatically format document pages. When you change items on master pages, they update on document pages. In this task you'll format the master page spread for the Features Brochure.



Keyboard Commands for Mac OS:

Display Master Pages	⌘+F10
Fit in Window	⌘+0 (zero)
Right	⌘+⌘+R
Bold	⌘+⌘+B
Modify	⌘+M
Center	⌘+⌘+C



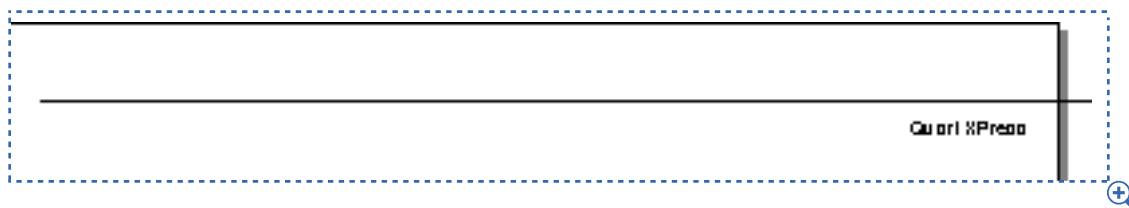
Keyboard Commands for Windows:

Display Master Pages	.SHIFT+F10
Fit in Window	.CTRL+0 (zero)
Right	.CTRL+SHIFT+R
Bold	.CTRL+SHIFT+B
Modify	.CTRL+M
Center	.CTRL+SHIFT+C

1 **Display the default master page:** Choose **Page → Display → A-Master A**.
The default master page, called **A-Master A**, reflects the margin guides and other settings in the **New Document** dialog box.

Choose **View → Fit in Window** and scroll to the right so you can see the entire right-facing page.

2 **Add the repeating page elements to the top of the right-facing page:**



The top of each right-facing page contains a rule and the product name.

Select the Orthogonal Line tool  and draw a horizontal line across the top of the right-facing page.

Select the Rectangle Text Box tool  and draw a short, wide text box under the line.

3 **Resize and reposition the line and box:** Select each item and use the  Measurements palette to specify its correct size and position as follows:

Item	X1	Y1	X2	Y2
Line	19p3	2p5	51p	2p5

Item	X	Y	W	H
Text box	41p2	3p	9p	2p

4 **Enter the product name in the text box and format it:** Using the  Content tool , select the text box under the line and enter QuarkXPress. If you wish, zoom so you can see the text better.

Double-click to highlight the word, then use the **Measurements** palette to format the text as follows:

Text	Alignment	Font	Size	Style
QuarkXPress	Right 	Helvetica	7 pt	Bold 

5 **Create a box to contain the side heads:**

Features

The outside margin of each right-facing page contains a side head; the text is customized on the document pages.

Select the Rectangular Text Box tool  and draw a short, wide text box anywhere on the right-facing page.

Choose **Item** → **Modify**; this displays the **Box** tab.

Enter values in the fields to specify the correct size and position of the box as follows:

Origin Across	Origin Down	Width	Height
35p7	24p	12p6	2p

Choose **Black** from the Color menu.

Click the **Text** tab and locate the **Vertical Alignment** area. Choose **Centered** from the **Type** menu. Click **OK**.

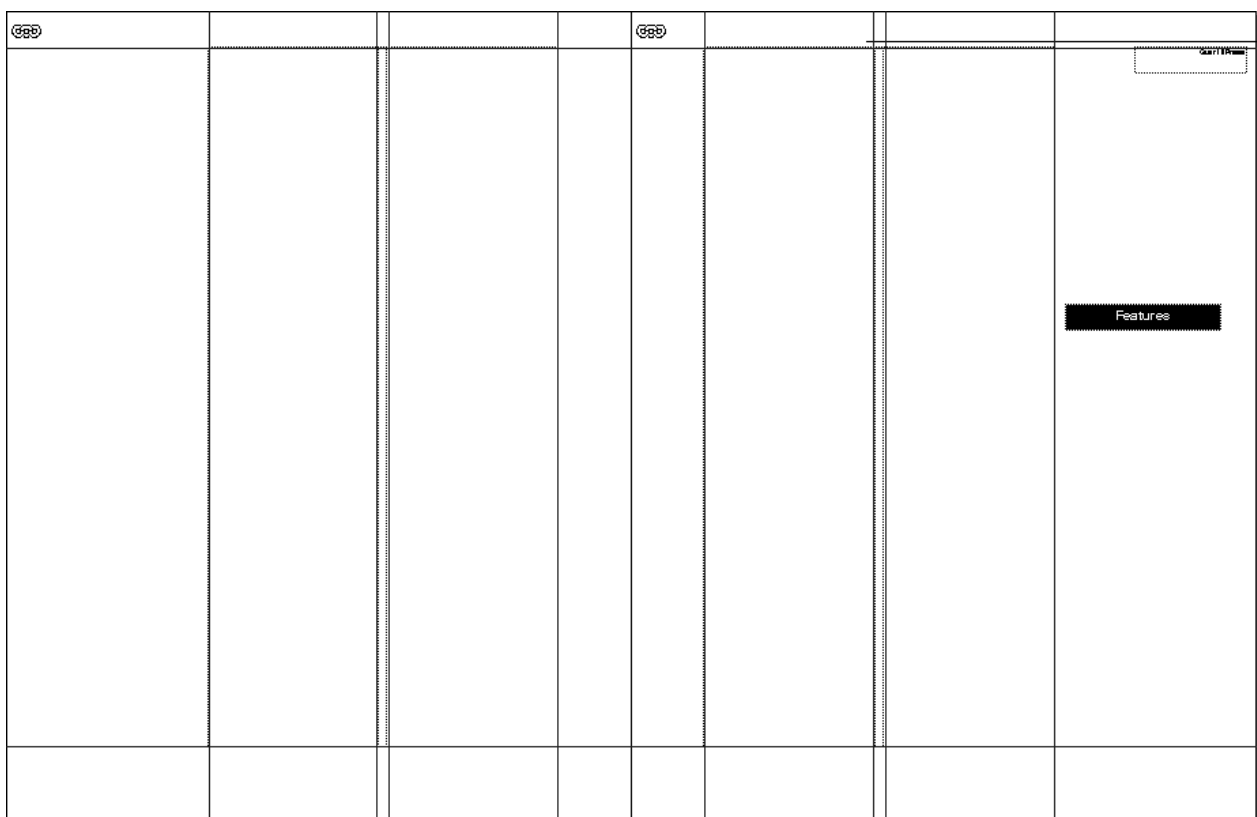
6 **Format sample text in the text box:** Using the Content tool , click to select the text box and choose **Style** → **Color** → **White** so you can see the text you type.

Enter **Features**. Double-click to highlight the word, then use the **Measurements** palette to format the text as follows:

Text	Alignment	Font	Size	Style
Features	Center	Helvetica	13 pt	Bold B

7 **Review the pages to make sure everything is there:** If you've zoomed in on the document while creating the items, choose **View** → **Fit in Window**.

Your master page spread contains automatic text boxes on both pages and a header and side head on the right-facing page. Your master page spread should look like this:



The master page spread includes automatic text boxes, a header, and a side head.



Shortcuts for precise item positioning: Since entering precise values in fields can be tedious, QuarkXPress provides a method for doing this entirely from the keyboard. First, go to the placement fields in the **Measurements** palette by pressing ⌘+Shift+M/CTRL+ALT+M or in the **Modify** dialog box by pressing ⌘+M/CTRL+M. Then, enter the first value and press Tab to get to the next field. If you make a mistake, Shift+Tab takes you to the previous field. When you're finished tabbing through the fields and entering values, press Return/↵ENTER.



Temporary zoom mode: Rather than selecting the Zoom tool  to magnify an item, then reselecting the previous tool, you can enter a temporary zoom mode. On Mac OS, just press the Control (⌘) key. On Windows, press the right mouse button.



Formatting text on master pages: Since master pages automatically place items on pages for you, you can save time by placing text on master pages. You'll place two types of text on master pages: standing text that doesn't get edited (like a footer containing the name of the book) and dummy text that gets edited on each document page (like a header that changes for each section in a chapter). With standing text, you can simply type it on the master page and format it the way you want. With dummy text, you can select the text box and format only the text insertion point. Or, you can format some sample text. You can even assign a style sheet to the text insertion point, so any text entered on document pages reflects that style sheet. Although you cannot enter text in the automatic text box, you can specify a default style sheet for the box.

Adding Page Numbers

If you add, delete, or rearrange pages in documents with automatic page numbering, the page numbers are updated automatically. In this task you'll specify and format automatic page numbers on the master page.



Keyboard Commands for Mac OS:

Automatic page number	⌘+3
Center	⌘+⇧+C
Bold	⌘+⇧+B
Duplicate	⌘+D
Display Document Pages	⇧+F10



Keyboard Commands for Windows:

Automatic page number	.CTRL+3
Center	.CTRL+SHIFT+C
Bold	.CTRL+SHIFT+B
Duplicate	.CTRL+D
Display Document Pages	.SHIFT+F10

1

Add a box for automatic page numbers to the right-facing page:

Select the Rectangle Text Box tool and draw a small text box anywhere on the page.

Use the **Measurements** palette to specify the correct size and position of the text box as follows:

Item	X	Y	W	H
Text box on right-facing page	17p3	61p	3p	1p5

2

Specify and format automatic page numbers: Using the Content tool

, click to select the new text box.

Press ⌘+3/CTRL+3 to enter the automatic page number character, which displays as <#>. If you wish, zoom in so you can see the character better.

To format page numbers, you format the <#> symbol. Double-click to highlight the symbol, then use the **Measurements** palette to format it as follows:

Text	Alignment	Font	Size	Style
<#>	Center	Helvetica	10 pt	Bold

- 3** Copy the box to the left-facing page and reposition it: With the box still selected, choose **Item → Duplicate**.

Using the Item tool , drag the new box to the left-facing page. Use the **Measurements** palette to specify its correct position as follows:

Item	X	Y
Text box on left-facing page	30p9	61p

- 4** Switch back to the document and save your changes: Choose **Page → Display → Document**, then choose **View → Fit in Window** to see all the master items on your document pages.

Choose **File → Save**.

 **Page number vs. page position:** You can section a document in QuarkXPress and call pages 1–4 pages “i–iv,” then call page 5, page “1.” If you do this, QuarkXPress expects you to enter those page numbers in fields (for example, to jump to the first page in a document, you enter “i”). These are referred to as “section” page numbers. You can also specify page numbers according to their position in a document. All you need to do is precede the page number with a plus sign (for example, to jump to the very first page in a document, you enter “+1”). These are referred to as “absolute” page numbers.

Inserting Pages while Flowing in Text

If you're using the automatic text box and page insertion features, you can have QuarkXPress add pages as you import text. You have already created a document with an automatic text box and checked preferences to ensure that automatic page insertion is specified. In this task you'll flow in the body copy for the brochure and watch as QuarkXPress adds the necessary pages.



Keyboard Commands for Mac OS:

Get Text⌘+E
 Document Layout F10
 Fit in Window⌘+0 (zero)



Keyboard Commands for Windows:

Get Text CTRL+E
 Document Layout F4
 Fit in Window CTRL+0 (zero)

- 1 Import text into the automatic text box:** Using the Content tool , select the two-column automatic text box on the first page.

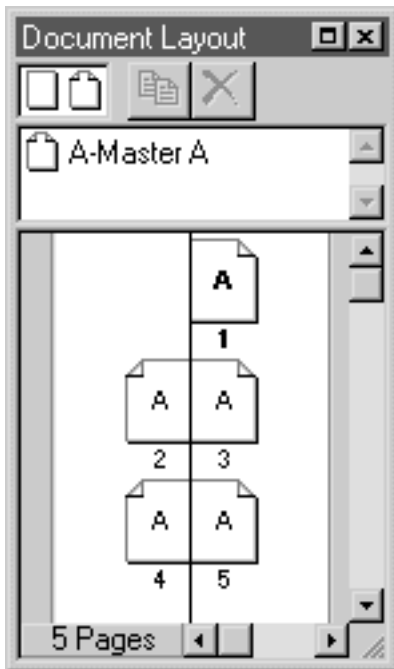
Choose **File → Get Text**. Open the “Module 2” folder and open the “Lesson 1” folder. Select the “Body.txt” file.

Make sure **Convert Quotes** and **Include Style Sheets** are checked, then click **Open**.

- 2 Look at the pages QuarkXPress added to contain the text:** Choose **View → Fit in Window**.

Choose **View → Show Document Layout**. Resize the palette as necessary to see that the document now contains five pages.

Double-click page icons in the lower portion of the **Document Layout** palette to display different pages. Notice the pages have the appropriate page numbers.



QuarkXPress automatically inserted four pages based on the default master page to contain all the imported text.

 **Using XPress Tags:** The text you're importing into the brochure is formatted with XPress Tags, Quark's proprietary tagging language. XPress Tags are formatting codes inserted in text; the codes are translated by the XPress Tags filter. When you check **Include Styles** in the **Get Text** dialog box, the XPress Tags filter converts the codes to formatting.

Inserting and Rearranging Pages

QuarkXPress provides various ways for inserting pages: automatic page insertion, the **Insert Pages** dialog box, the **Document Layout** palette, and thumbnails drag (which lets you drag pages in from other documents). In this task, you'll add covers and a spread to the Features Brochure.



Keyboard Commands for Mac OS:

Thumbnails ⌘+F6
Open ⌘+O



Keyboard Commands for Windows:

Thumbnails SHIFT+F6
Open CTRL+O

1 | **Open the document containing the brochure's cover:** Choose **File → Open**. Open the "Module 2" folder, then open the "Lesson 1" folder. Select "Cover.qxt" and click **Open**.

!!! | If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

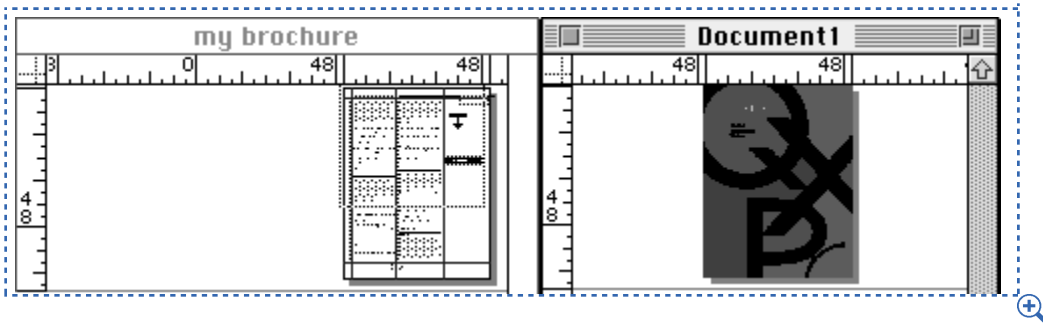
2 | **Prepare to drag pages in from another document:** To drag pages between documents, the documents must be in **Thumbnails** view (the "Cover" document already is). Activate your document and choose **View → Thumbnails**.

Resize and reposition the two document windows so they are side-by-side. Make sure the first page in your brochure is showing.

Choose **File → Save**. If you drag the cover into the wrong position (in the next step), you'll be able to choose **File → Revert to Saved** without losing any work.

3 | **Drag the cover into the brochure:** Click to select the page in the "Cover" document. Drag the cover page above the first page of your brochure; release the mouse button when the force down pointer ⇩ displays.

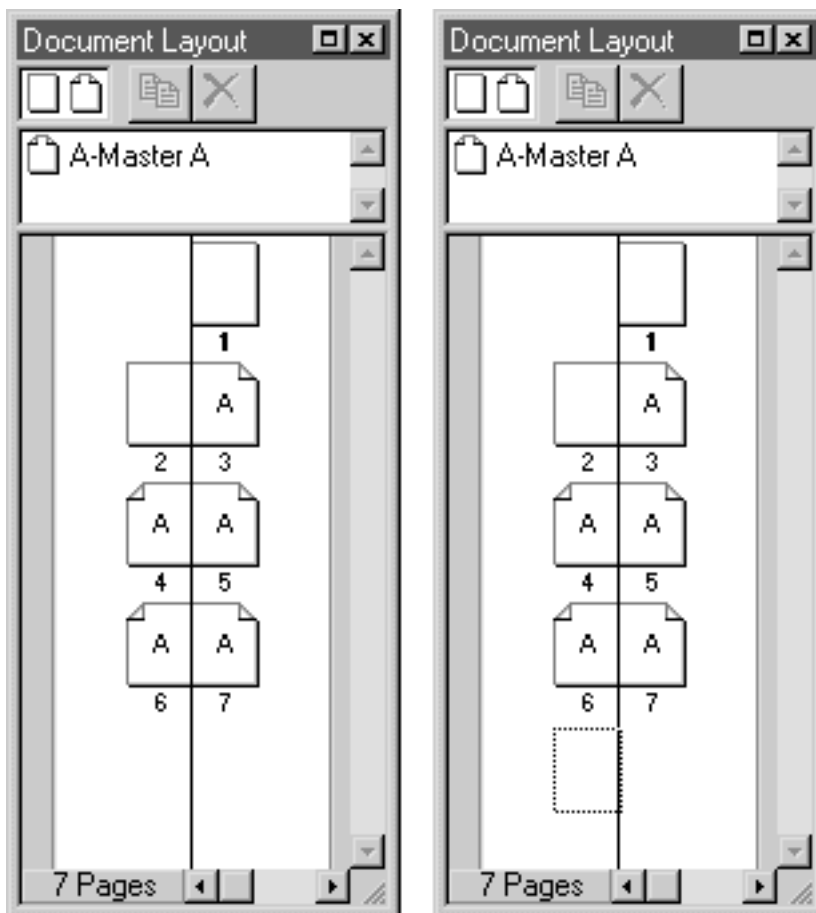
Close the “Cover” document without saving changes.



Share pages between documents by dragging them in **Thumbnails** view.

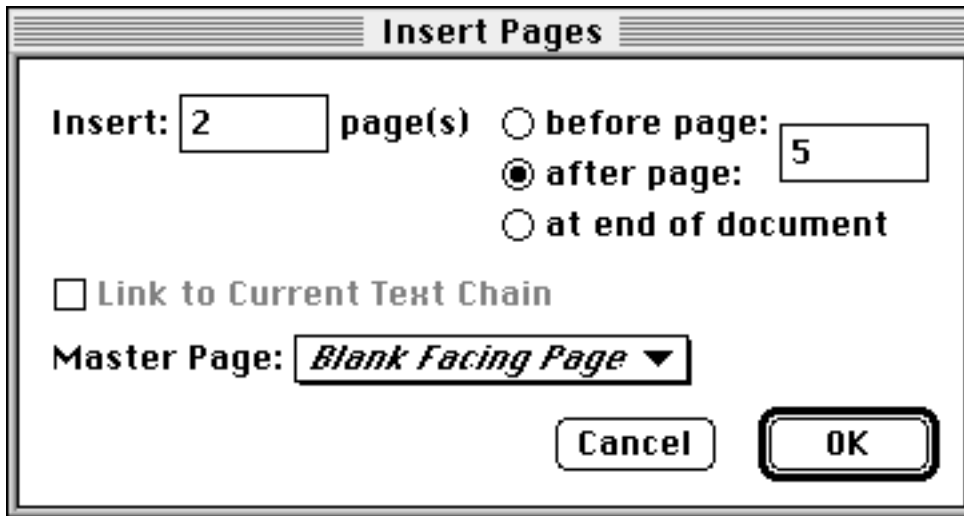
4 **Insert the inside cover and back cover pages:** In the **Document Layout** palette, select the blank facing-page icon . Drag it to the left of page 2 according to the picture (below). Click when the page is in the correct position.

Drag another blank facing-page to the end of the document according to the picture (below).



Use the page icons at the top of the **Document Layout** palette to insert blank pages.

- 5** Insert a spread to contain elements designed by another artist: Choose **Page → Insert**. Enter 2 in the **Insert** field. Click after page and enter 5 in the field. Choose *Blank Facing Page* from the **Master Page** menu and click **OK**.



Use the **Insert Pages** dialog box to specify how many pages to insert, where to insert them, and which master page to base them on.

- 6** Prepare to drag in design elements from another document: The “Spread” document is in the standard European size of A4. Since the Features Brochure you’re working on is US Letter size, you cannot thumbnails drag the pages into your document. Instead, you will drag a copy of the page elements onto the blank spread. The screen shot and callouts on the spread are grouped so you can manipulate them as one item.

Since you cannot edit documents in Thumbnails view, enter 20 in the view percent field in the lower left corner of your brochure’s document window.

Choose **File → Open**. Open the “Module 2” folder and open the “Lesson 1” folder. Select “Spread.qxt” and click **Open**.

!!! If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

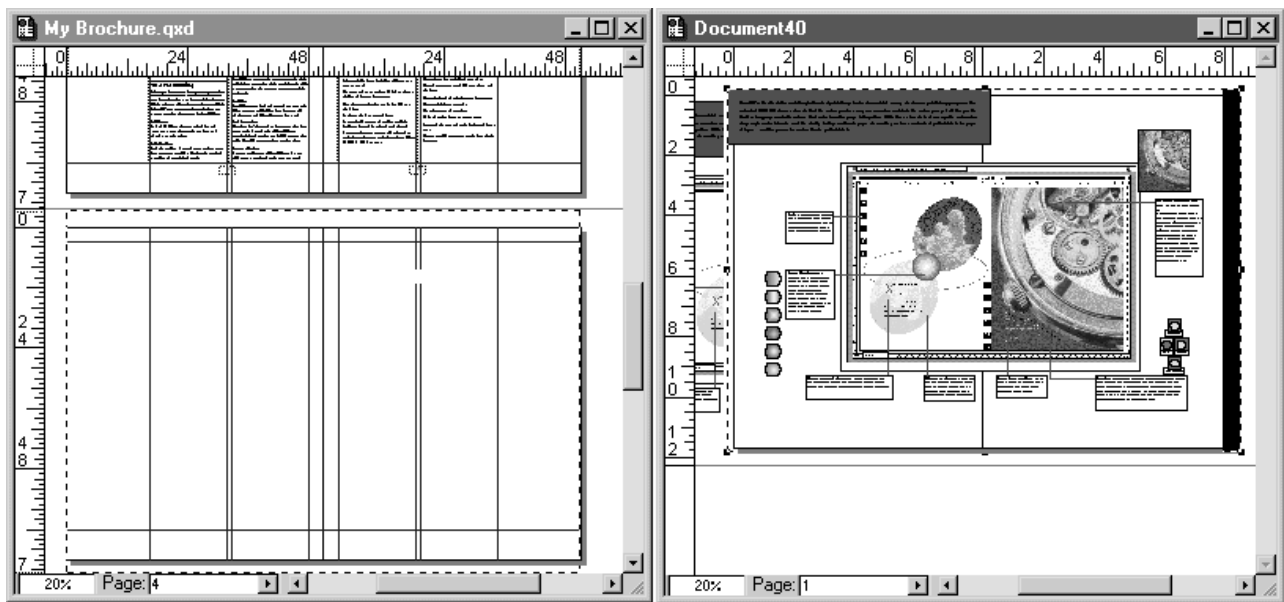
Resize and reposition the document windows so they are side-by-side. Make sure the blank spread in your brochure is displayed in the document window.

For easier viewing, enter 20 in the view percent field of the “Spread” document.

- 7** Drag the screen shot and callouts into your brochure: Using the Item tool , click to select the grouped items in the “Spread” document.

Drag the group over to the blank pages in your brochure; release the mouse button when the outline of the spread is over the pages.

Close the “Spread” document without saving changes.



In addition to dragging pages between documents, you can drag individual items and groups of items.

Make sure the group is still selected, then use the **Measurements** palette to specify the correct size and position of the group as follows:

Item	X	Y	W	H
Group	0"	0"	17"	11"



Since the default measurement system in this document is picas, you need to be sure to enter the inch marks with these values.

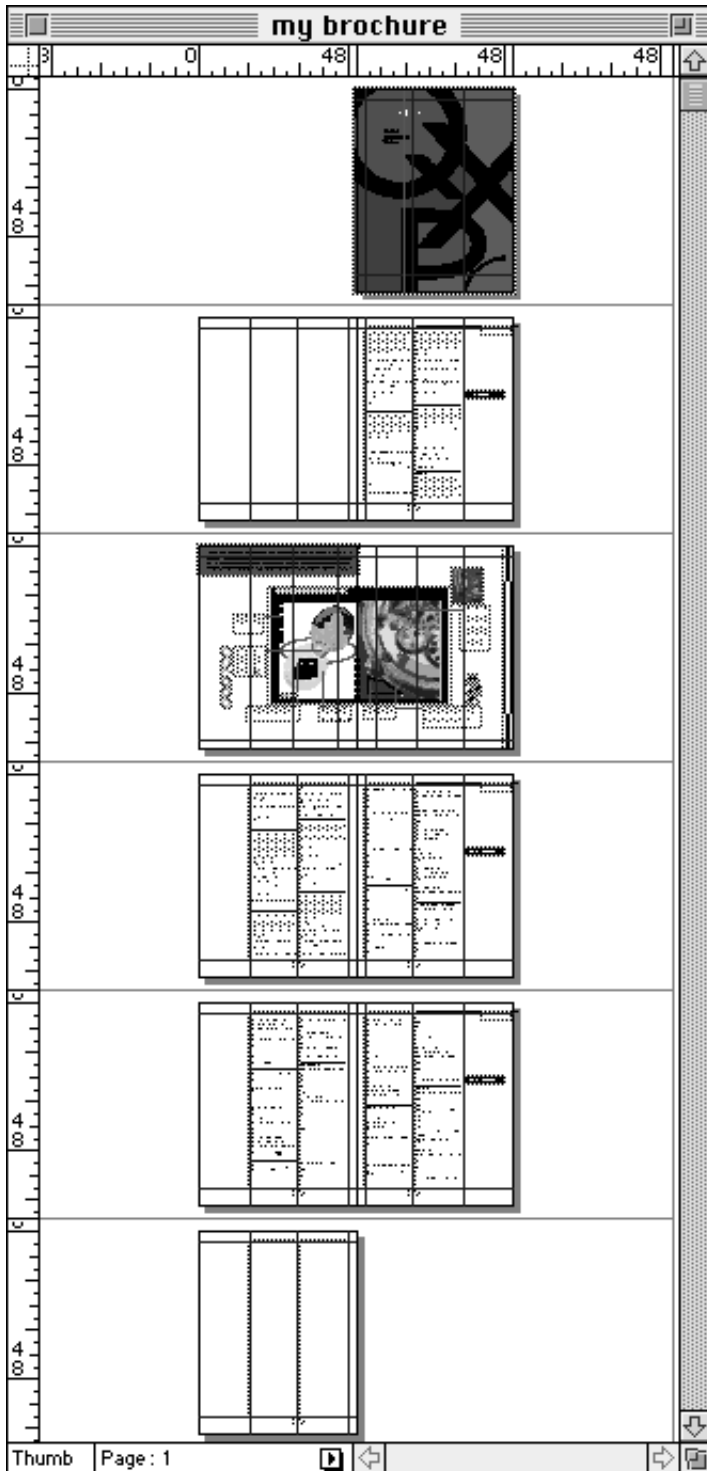
8 Move the spread up to display pages 4 and 5: Choose **File** → **Save**.

If you drag the pages into the wrong position, you'll be able to choose **File** → **Revert to Saved** without losing any work.

In the **Document Layout** palette (or **Thumbnails** view) Shift+click to select pages 6 and 7.

Drag the page icons up under the first spread until the force down pointer  displays. Release the mouse button to rearrange the pages.

Choose **File** → **Save** to save your brochure. Your document should look something like this:



After adding and rearranging pages, your document should contain 10 pages including the covers.



Pointers for page positioning: When you insert and rearrange pages in the **Document Layout** palette or **Thumbnails** view, the pointer changes to one of six icons (☐, ☐, ☐, ⇄, ⇄, or ⇄) depending on the page's placement. If the ⇄, ⇄, or ⇄ pointer is displayed when you insert a page, other pages will be shuffled (repositioned, reformatted, and renumbered) to maintain the proper left/right facing-page layout.



Shortcut for inserting pages: To open the **Insert Pages** dialog box from the **Document Layout** palette, press Option/ALT while you drag a master page icon into the document page area.



Shortcut for View Percent field: To go to the **View Percent** field in the lower left corner of the document window, press Control+V/CTRL+ALT+V. Enter the new value and press Return/↵ENTER.



Resizing items in a group simultaneously: When you select a group with the Item tool ⇄, you can resize all the items in the group simultaneously. You can either drag a resize handle or enter new width and height values in the **Measurements** palette or **Group** tab of the **Modify** dialog box (**Item** menu). This resizes only the boxes and lines in the group. To resize all frame widths, line weights, pictures, and text as well, press ⌘+Option+Shift/CTRL+ALT+SHIFT (for proportional resizing) or ⌘/CTRL while dragging a resize handle.



Selecting thumbnails or page icons: To select a range of continuous pages in either **Thumbnails** view or the **Document Layout** palette, Shift+click the icons. To select discontinuous pages, ⌘+click the icons on Mac OS, or CTRL+click the icons on Windows.

Editing Master Items

Items on document pages that are placed by master pages are called “master items.” You can edit master items on document pages to customize each page. In this task you’ll make the side heads specific to the content and add the introduction to the inside cover page.



Keyboard Commands for Mac OS:

Actual Size	.⌘+1
Delete	.⌘+K
Modify	.⌘+M
Send to Back	.⇧+F5



Keyboard Commands for Windows:

Actual Size	.CTRL+1
Delete	.CTRL+K
Modify	.CTRL+M
Send to Back	.SHIFT+F5

1 **Customize the side head on each content page:** Choose **View → Fit in Window**. Select the Content tool  and add the word “Key” before the word “Features” on page 3. Then, add the word “Complete” before the word “Features” on pages 7 and 9.



The side head containing the word “Features” is a master item. You can edit master items to suit each page.

2 **Apply a master page to the inside cover page:** In the Document Layout palette, click to select the A-Master A icon  and drag it on top of page 2.

3 **Customize the text box on the inside cover page:** Double-click the page 2 icon to display it in the document window.

Click to select the page number text box and choose **Item → Delete**.

Click to select the remaining text box and choose **Item → Modify**.

In the **Box** tab, choose *None* from the **Color** menu. In the **Text** tab, enter 1 in the **Columns** field. Click **OK**.

4 | **Finish formatting the inside cover page:** Select the Rectangle Picture  Box tool  and draw a large box over the entire page. Choose **Item** → **Send to Back**.

Choose **Item** → **Modify**. In the **Box** tab, enter values in the fields to specify the correct size and position of the box as follows:

Origin Across	Origin Down	Width	Height
-0p9	-0p9	51p9	67p6

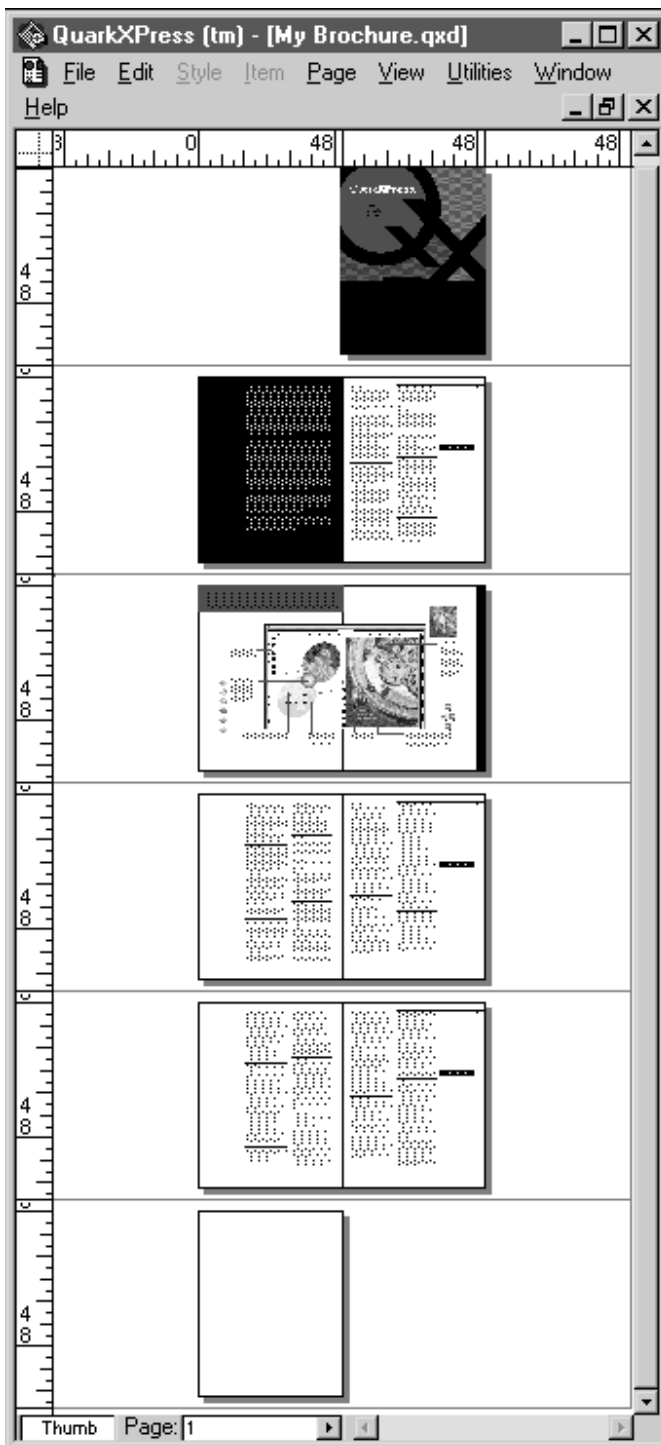
Choose **Black** from the **Color** menu. Click **OK**.

5 | **Import the introductory text on page 2:** Using the Content tool , select the text box.

Choose **File** → **Get Text**. Open the “Module 2” folder and open the “Lesson 1” folder. Select the “Intro.txt” file.

Make sure **Convert Quotes** and **Include Style Sheets** are checked, then click **Open**.

In **Thumbnails** view, your document should look something like this:



The inside cover page of the document has been formatted and introductory text has been added to page 2.

- 6** **Close and save the document:** Choose **File** → **Close**. If you haven't recently saved your document, a dialog box asks you to save it. Click **Yes**.

**Checkpoint**

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Format and apply a master page
- Specify automatic page numbers
- Insert pages automatically and manually
- Edit items on document pages that were placed by master pages

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Create and format a new master page.
- Insert pages based on a new master page.
- Change items on master pages to see how the changes are reflected on document pages.



The lesson files are all templates, which means you can open copies of them without affecting the original files.

Document Preferences

The controls in the **Document Preferences** dialog box affect the way certain QuarkXPress features work with documents — for example, whether pages are inserted automatically when text overflows and how colors trap.

If you modify settings in the **Document Preferences** dialog box when no documents are open, the settings become application defaults and affect all new documents. However, if you modify **Document Preferences** when a document is open, the settings are applied to and saved only with the active document.

The **Document Preferences** dialog box (**Edit** menu) contains five tabs, each with its own set of controls.

- The **General** tab lets you specify page layout defaults, including the measurement system, whether and where pages are automatically inserted when text overflows, and the position of frames and guides.
- The **Paragraph** tab lets you specify the defaults for paragraph-based typography features like leading and hyphenation.
- The **Character** tab lets you specify the defaults for character-based typography features like automatic kerning, and the size and position of superscript, subscript, small caps, and superior characters.
- The **Tool** tab lets you specify the default settings for the Zoom tool  and each item creation tool. For example, you can customize the text box tools so they always create boxes with two columns and 1 pt frames. You can also reset the tools to the original default settings.
- The **Trapping** tab lets you specify the values QuarkXPress uses when trapping automatically. By specifying trapping relationships between colors, you can avoid the white areas that can occur when printing plates are misaligned or when paper shifts or stretches on a commercial printing press.

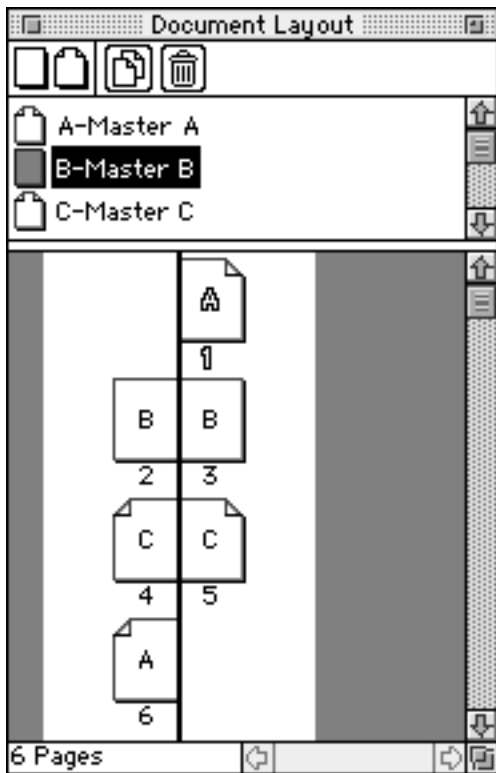
 **Nonmatching Preferences dialog box:** The **Nonmatching Preferences** dialog box, which often displays when you open a document, is not referring to **Application Preferences** or **Document Preferences**. The alert refers to differences in hyphenation exceptions, kerning tables, tracking tables, and bitmap frames created with Frame Editor (on Mac OS).

Document Layout Palette

Icons in the **Document Layout** palette provide an intuitive method for adding, deleting, rearranging, and displaying pages and master pages.

Opening and closing the Document Layout palette

The **Show/Hide Document Layout** command in the **View** menu is the official method for opening and closing the **Document Layout** palette. For speed, press F10 (Mac OS) or F4 (Windows) to open and close it. If you're using the mouse, click the close box to close the **Document Layout** palette.



The **Document Layout** palette is divided into three sections: the top provides buttons for creating and duplicating master pages, and deleting pages; the middle displays master page icons; and the bottom displays document page icons.

Manipulating pages

The four icons at the top of the **Document Layout** palette let you insert blank pages, duplicate master pages, and delete selected pages.

- The  icon lets you insert blank single-sided pages into a document.
- The  icon lets you insert blank facing-page pages into a document.
- The  and  icons also let you create new master pages.

- The  icon lets you create new master pages based on existing master pages.
- The  icon lets you delete selected master pages and document pages.

 The blank facing-page icon is available only if you checked **Facing Pages** either in the **New Document** dialog box or in the **Document Setup** dialog box (**File** menu).

Working with master pages

The master pages area of the **Document Layout** palette lets you insert, apply, and rename new master pages.

- Drag a master page icon into the document pages area to insert a page based on that master page, or apply that master page to a document page.
- Click on the name fields next to the master page icons  or  to rename master pages.

Working with document pages

The document page area of the **Document Layout** palette displays page layout, page numbers, and the master pages on which pages are based.

- Document page icons , ,  can be repositioned in the layout.
- Plain single-sided page icons  and facing-page icons  indicate pages not based on master pages.
- Page icons containing master page prefixes indicate document pages based on master pages.
- Double-clicking a document page icon displays the associated page in the document window.

 **Expanding the master page area:** You can expand the master page area in the **Document Layout** palette so you can see all the master pages. To expand the master page area, click the split bar between the two areas and drag it down.

 **Page numbers in the Document Layout palette:** QuarkXPress always displays “section” page numbers for document pages. Section page numbers are assigned through the **Section** dialog box (**Page** menu) and don’t necessarily represent a page’s position in a document. (For example, you might start a document on page 15.) If you need to see a page’s “absolute” page number, which does represent its position in a document, you can do so through the Document Layout palette. To view a page’s absolute page number, select it and Option+click/ALT+click in the **Document Layout** palette. The absolute page number is displayed in the field in the lower left corner of the palette.

 Master Pages

A master page is a nonprinting page used to format document pages automatically. When you insert a document page, it contains all the items on the master page upon which it is based. Master pages typically contain items such as headers, footers, page numbers, and other design elements that are common to a number of document pages. You can modify and delete master page items on document pages. QuarkXPress lets you create up to 127 master pages per document to accommodate all the different types of pages in a publication.

Formatting a master page

A master item is any item included on a master page. Adding master items to a master page is performed the same way as adding items to a document page. Display a master page in the document window. Create the master items — such as picture boxes, text boxes, and lines — that you want to appear on document pages. Text can be added to any box, except the automatic text box on a master page.

Inserting new document pages based on existing master pages

Click and drag a master page icon from the master page area into the document page area. Release the mouse button when the appropriate pointer (↕, ↗, ↘) is displayed in the position for the new page. You can also specify a master page for pages inserted via the **Insert Pages** dialog box (**Page** menu).

Applying a different master page to a document page

To apply a different master page to an existing document page, drag a master page icon on top of the document page icon. To apply a different master page to multiple document pages, select the page icons then press Option/ALT while you click the master page icon.

Keeping or deleting changes to master items on document pages

When you apply a new or modified master page to a document page, you can control how the document pages are updated using the **Master Page Items** menu in the **General** tab of the **Document Preferences** dialog box (**Edit** menu).

- To keep master item changes: Choose **Keep Changes**. When you choose this, master page items modified on document pages are not deleted. However, the new master page items, including text and picture boxes, may overlay the modified items on the document page.
- To delete changes: Choose **Delete Changes**. When you choose this, both modified and unmodified master page items are deleted and replaced by the new master page items.



Displaying master pages: QuarkXPress has several methods for displaying master pages: double-clicking a master page icon in the **Document Layout** palette, choosing a master page from the **Display** submenu of the **Page** menu, and choosing a master page icon from the go-to-page menu in the lower left corner of the document window.

Page Numbers

QuarkXPress helps you perform page-numbering tasks automatically. You can also create individually numbered sections within a document, and you can specify the way pages in each section are numbered.

Using automatic page numbering

With QuarkXPress, page numbers can be automatically inserted on document pages by typing a control character on a master page. To insert an automatic page number:

- 1 Display a master page in the document window, then create a text box where you want a page number to appear. Remember, the automatic text box on a master page cannot contain text.
- 2 Press $\text{⌘}+3/\text{CTRL}+3$ to create the page number place holder <#>. Page numbers will be placed on document pages based on that master page.
- 3 Highlight the placeholder <#> and format it.

Creating a document section

A document section is a group of sequentially numbered pages. To specify a document page as the beginning of a section:

- 1 Check the page number area in the lower left corner of the document window to make sure the correct page is displayed.
- 2 Choose **Page → Section**.
- 3 Check **Section Start**; the current page becomes the first page of the new section.
- 4 To specify the characters used as a prefix for automatic page numbers, enter up to four characters in the **Prefix** field.
- 5 To specify the beginning number for the section, enter a number in the **Number** field.
- 6 To specify the format used for automatic page numbers in the section, select one of the options from the **Format** menu: Arabic numerals **1, 2, 3, 4**; uppercase Roman numerals **I, II, III, IV**; lowercase Roman numerals **i, ii, iii, iv**; uppercase alphabetic **A, B, C, D**; or lowercase alphabetic **a, b, c, d**.
- 7 Click **OK** to create the section and format automatic page numbers as specified.



Shortcut to the Section dialog box: To quickly start a section while working with the **Document Layout** palette, click the starting page and click the page number displayed in the lower left corner of the palette. The **Section** dialog box opens so you can set up the section.



Adding a page number to a document page: Whether or not you've included a placeholder for an automatic page number on a master page, you can add an automatic page number to any document page. Type ⌘+3/CTRL+3 on any page any where and the appropriate section page number will appear automatically.

Text Chains

You can control the flow of text through a document by linking text boxes. When you link two or more text boxes, you create a text chain (called a *story*). When you add or edit the text in one of the boxes in the chain, the story reflows through the rest of the chain.

Creating automatic text boxes for a new document

Automatic text boxes ensure that you can begin typing immediately in a new document and that text will automatically flow into subsequent document pages. To establish automatic text flow when creating a document:

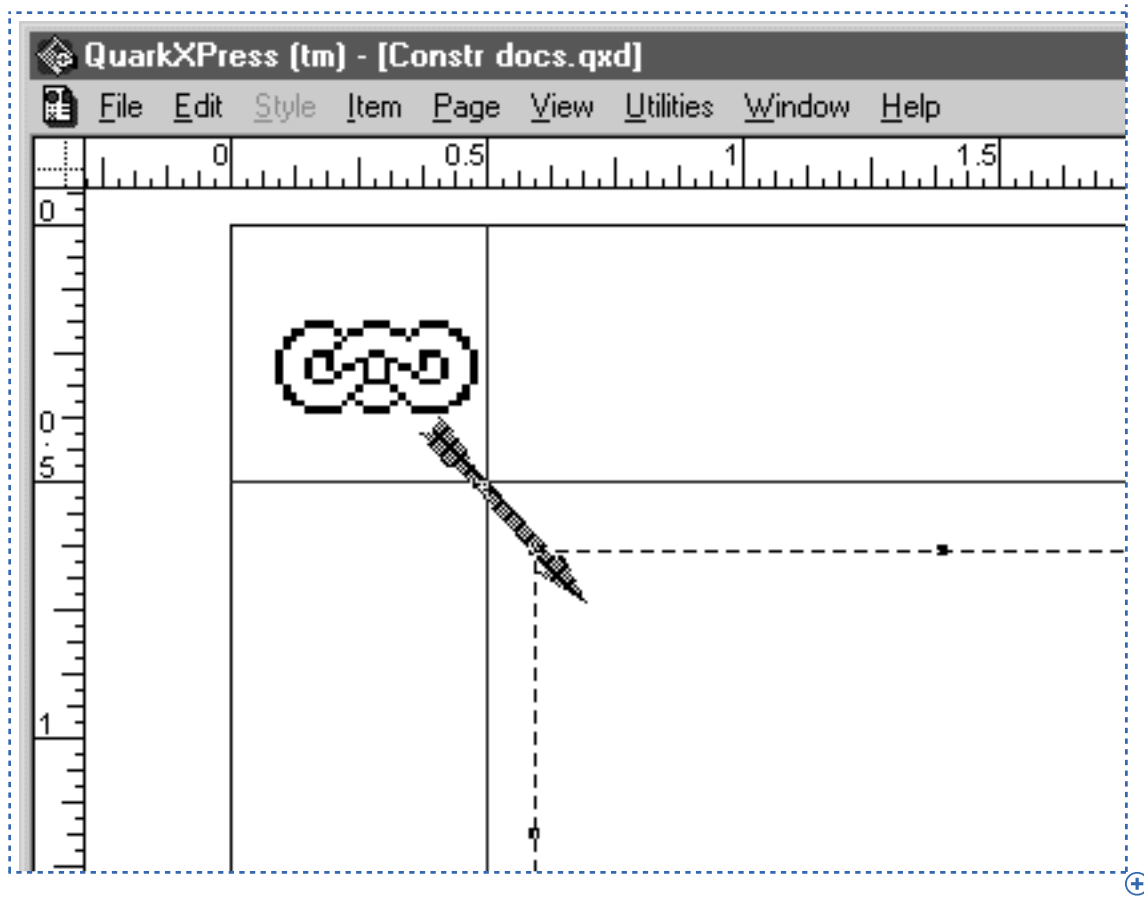
- 1 Choose **File** → **New** → **Document**.
- 2 Check **Automatic Text Box**. The size and position of this box is determined by the values in the **Margin Guides** field.
- 3 Enter **Margin Guide** values to specify the size and position of the automatic text box.
- 4 Enter values in the **Column Guides** area to specify the number of text **Columns** and their **Gutter Width** (space between columns).
- 5 Click **OK**.

Creating automatic text boxes on master pages

If a document doesn't have an automatic text box, you can create one without having to create a new document:

- 1 Display a master page in the document window.
- 2 Create a text box to serve as the automatic text box.
- 3 Select the Linking tool .

- 4 Click the Broken Chain Icon  in the upper left corner of the master page; a marquee (moving dotted line) is displayed around the icon.



Creating an automatic text box on a master page.

- 5 Click the text box; a Linking Arrow indicates that automatic text flow has been established and the text box becomes marqueeed.

Inserting pages for text overflow

The **Auto Page Insertion** menu in the **General** tab of the **Document Preferences** dialog box (**Edit** menu) lets you determine whether pages are automatically inserted, and where they will be placed when you enter or import more text than a text box can display. To enable **Auto Page Insertion**:

- 1 Choose **Edit** → **Preferences** → **Document**.
- 2 In the **General** tab, choose **End of Story**, **End of Section**, or **End of Document** from the **Auto Page Insertion** menu.
- 3 Click **OK**.

Linking pages to automatic text chains

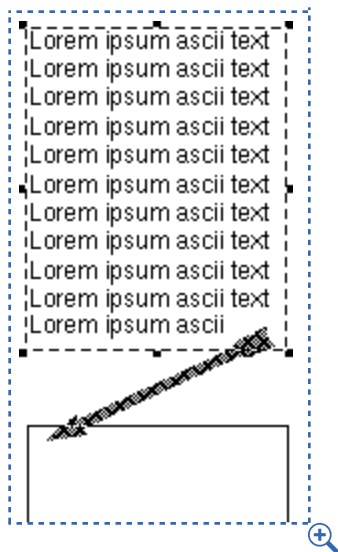
When you insert pages in a document, you choose whether they will link with the current text chain. To do so:

- 1** | Display the page that new pages will be added after. The page number area in the lower left corner of the document window indicates the current page.
- 2** | Select the automatic text box on that page.
- 3** | Choose **Page → Insert**.
- 4** | Choose a master page with an automatic text box from the **Master Page** menu.
- 5** | Check **Link to Current Text Chain**. (**Link to Current Text Chain** is available only when a text box is active on the page preceding the inserted page, and you choose a master page with an automatic text box.)
- 6** | Click **OK**.

Establishing manual text chains

To link text boxes and create a manual text chain:

- 1** | Select the Linking tool  to add one text box to a chain.
- 2** | Click the text box that begins the text chain; it becomes marqueeed.



Link boxes together using the Linking  tool. The Linking Arrow indicates the box on top is linked to the text box below.

- 3** Click the text box that should be next in the chain. The second text box is linked to the first and the Linking tool automatically deselects.

 **Automatic and manual text chains:** You can establish two types of text chains in a document: a single automatic text chain, as well as any number of manual text chains. Manual text chains are often used in magazines, newspapers, or newsletters, where a story jumps among pages. Text in an automatic text chain flows through automatic text boxes, which you can specify when you create a new document or edit a master page. Automatic text chains are useful for documents containing a long, single story such as a chapter of a book.

 **Conditions for automatic page insertion:** Text overflow causes pages to be automatically inserted only if: (1) **Auto Page Insertion** is enabled; (2) the master page has an automatic text chain (as indicated by the Intact Chain Icon  in the upper left corner of the master page); (3) the overflow is from the text box defined on the master page as the automatic text chain box or from a chain of at least two text boxes.

 **Breaking text box links:** You can break links between boxes using the Unlinking tool . Click a text box that is part of a text chain to display the arrow(s) that indicate links. Click the Unlinking pointer  on an arrow's head or tail feathers.

 **Rerouting text box links:** To remove a text box from a chain of three or more text boxes, and reroute the links around it, select the Unlinking tool  and press Shift while clicking the box.

2

Working with Colors

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2

Working with Colors

What's Ahead

QuarkXPress provides a default set of colors with documents and lets you create thousands of additional colors. Creating colors isn't just about finding a pretty color on a color wheel or in a swatch book — when you create a color you define how it prints. Once you've created a color, you can start applying it to boxes, lines, frames, text, and some types of pictures using the **Colors** palette, menu commands, or dialog boxes.

In this lesson you'll create colors for a brochure, apply those colors, then edit the document's colors list. To see the finished document, which contains additional elements and formatting, open "Features.qxt," in the Lesson 1 folder inside the "Module 2" folder.

Opening a Document

Unless you've edited the default colors list, documents contain Cyan, Magenta, Yellow, Black, Red, Green, Blue, and White. In this task you'll open a version of the Features Brochure in progress and check out its colors list.



Keyboard Commands for Mac OS:

Open⌘+O
 Save as⌘+⇧+S
 Show/Hide Colors F12



Keyboard Commands for Windows:

Open CTRL+O
 Save as CTRL+ALT+S
 Show/Hide Colors F12

1 | **Open the “Color.qxd” template:** Choose **File → Open**. Open the “Module 2” folder, then open the “Lesson 2” folder. Select “Color.qxd” and click **Open**. A new document based on the template displays.

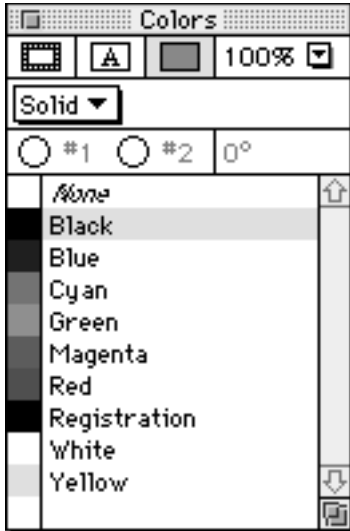
!!! | If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

2 | **Save the document in the Student Files folder:** Choose **File → Save as**. Open the Student Files folder and enter a descriptive name like “My Color Brochure.qxd.” (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

- 3** | **Open the Colors palette:** Choose **View → Show Colors**. Click on any item in the document to activate the **Colors** palette.

The **Colors** palette displays the document's colors list — in this case, it's the default colors list.



The document contains the unedited default colors list.

-  | **Registration color:** The Registration color in the default colors list is for items that appear on every plate in color separations — like registration marks. You can change the color of Registration, but you cannot delete it.

Creating New Colors

If you've already selected the colors to use in a piece, you can open the **Colors** dialog box and create them all at once. Or, you can add colors as you go. In this task you'll create all the colors used in the Features Brochure.



Keyboard Commands for Mac OS:

Colors⌘+F12



Keyboard Commands for Windows:

Colors SHIFT+F12

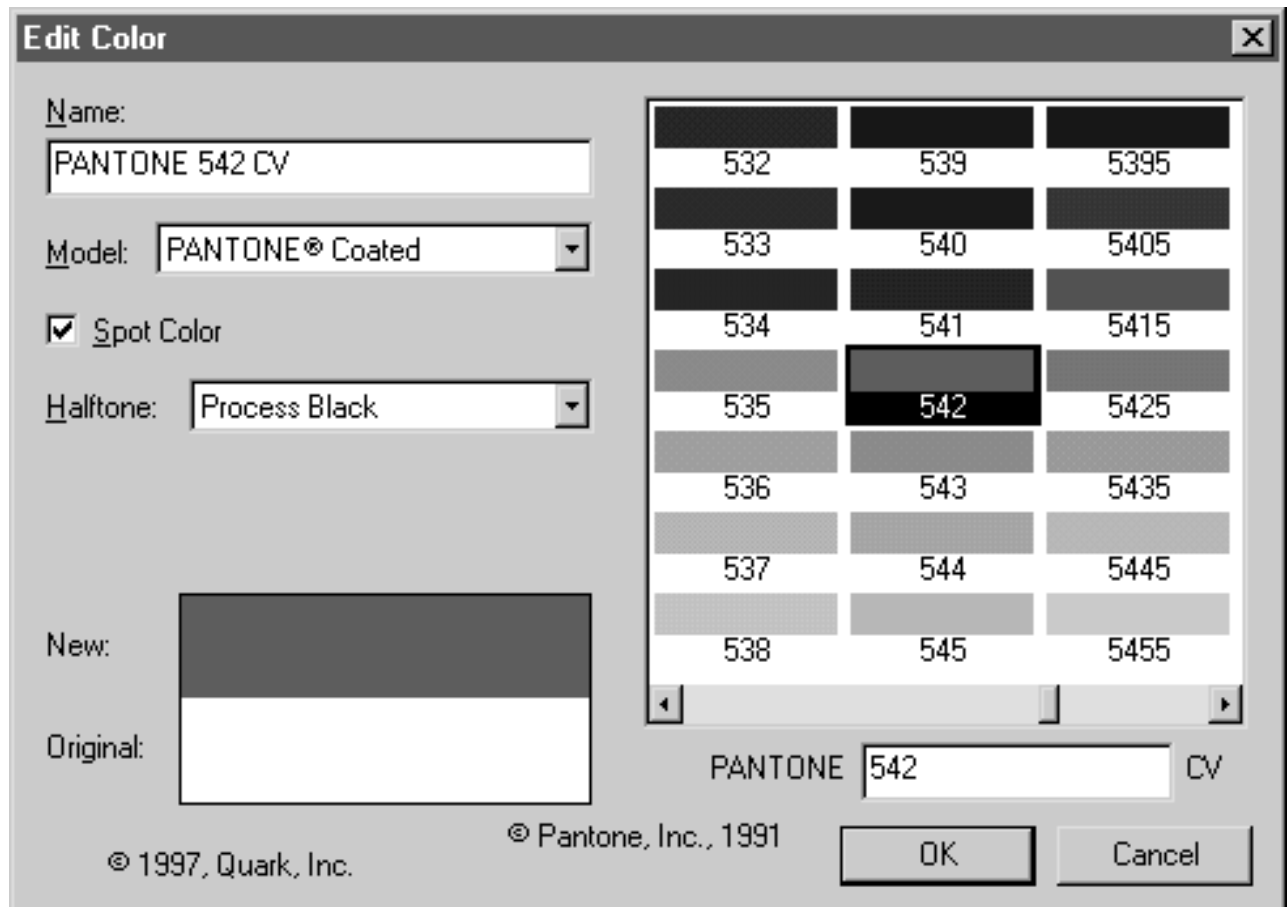
1

Open the Colors dialog box: Choose **Edit → Colors**. Click **New**.

- 2** Create a spot color: Choose **PANTONE® Coated** from the **Model** menu and make sure **Spot Color** is checked.

Locate the **PANTONE** field in the lower right corner and enter 542.

Specifying a PANTONE color automatically highlights the appropriate color swatch and enters the name in the **Name** field. Click **OK**.



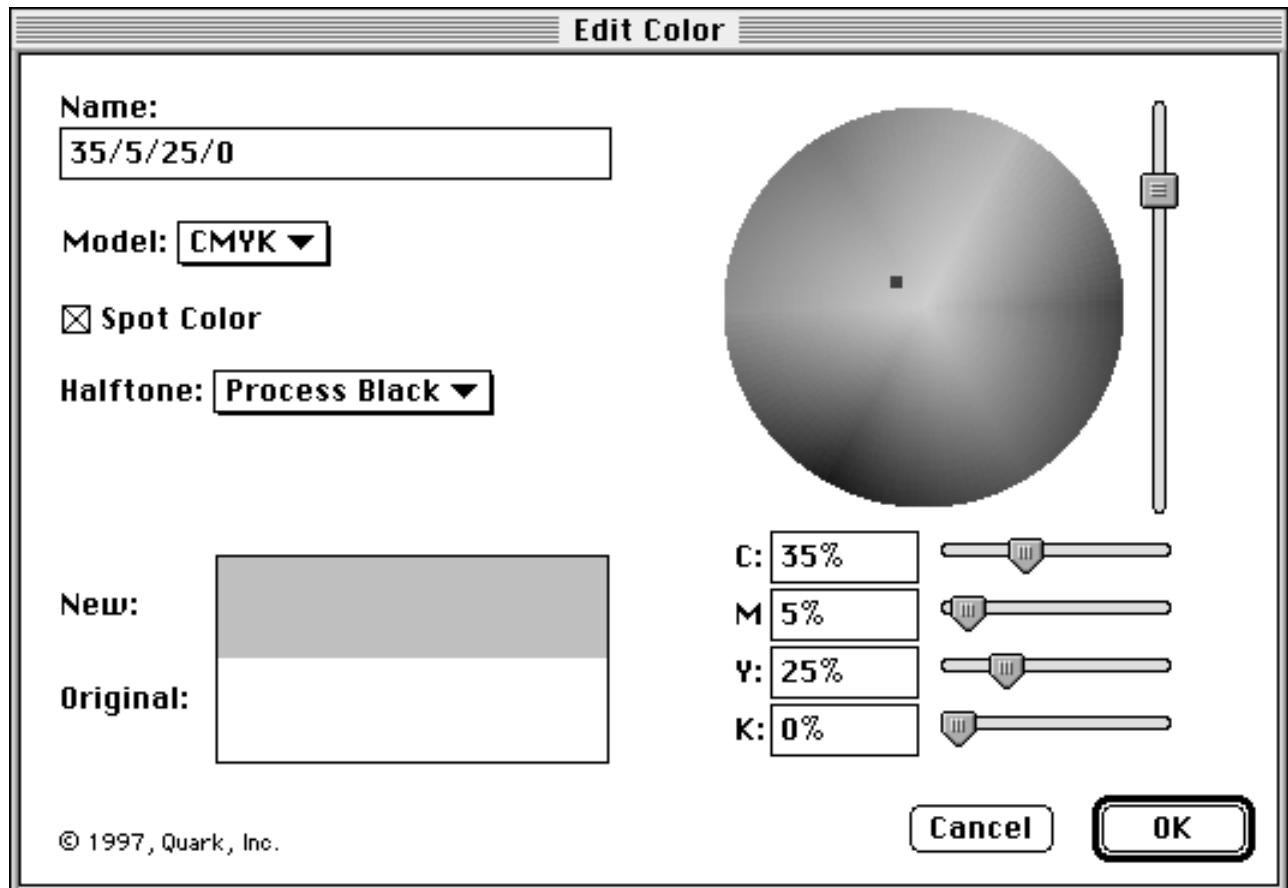
The **Edit Color** dialog box lets you choose a color model, then create colors using color swatches, a color wheel, or numerical values.

- 3** Create the remaining spot color: To create the remaining spot color for the brochure, repeat steps 1 and 2: click **New**, choose **PANTONE Coated** from the **Model** menu, make sure **Spot Color** is checked, enter 340 in the **PANTONE** field, and Click **OK**.

- 4 Create a process color:** Click **New** again in the **Colors** dialog box. Choose **CMYK** from the **Model** menu and uncheck **Spot Color**.

Enter 35 in the **C** field, 5 in the **M** field, 25 in the **Y** field, and 0 in the **K** field. (Press Tab to go to the next field.) The color should be light green.

To name the color so you'll remember its color values, enter 35/5/25/0 in the **Name** field. Click **OK**.



In the **Edit Color** dialog box, you can click the color wheel, drag the sliders, or enter values in the fields to specify a CMYK color.

- 5 Create the two remaining process colors:** To create the remaining CMYK colors for the brochure, repeat all the actions in step 3: Click **New**, choose **CMYK** from the **Model** menu, uncheck **Spot Color**, and enter its values in the CMYK fields. Name the colors according to their color values, then click **OK**.

Cyan	Magenta	Yellow	Black	Visual Color
0%	10%	95%	0%	mustard/yellow
40%	25%	0%	15%	purple-blue/gray

6 **Close the Colors dialog box:** When you're finished creating colors, click **Save** in the **Colors** dialog box. The new colors are saved with the document and displayed in the **Colors** palette.

Choose **File** → **Save** to save your work in progress.

 **Changing the default colors list:** If you create and edit colors when no documents are open, the changes are saved with the application and affect all new documents. For example, you might want to delete the default red, green, and blue. Then, if your organization has a standard PANTONE color, you might want to add it to the default colors list.

 **Color naming conventions:** It's tempting to name colors according to how they appear (to you). If you do, you'll end up with a list of names that resemble a crayon box — hot pink, grass green, mist, etc. These names give no indication of the color model or how the color will interact with other colors. Naming process colors according to their CMYK components (for example, 35/5/25/0) is more informative and descriptive.

Applying Colors

When all you're doing is applying colors to a document, the **Colors** palette is the quickest method. However, as you're creating and editing items, you can use menus and dialog boxes to apply colors as well. In this task you'll apply colors to boxes, lines, and text using a variety of methods.



Keyboard Commands for Mac OS:

Go to Page	.⌘+J
Show/Hide Colors	.F12
Undo	.⌘+Z
Zoom In pointer M	.⌘
Show/Hide Guides	.F7
Modify	.⌘+M
Thumbnails	.⇧+F6



Keyboard Commands for Windows:

Go to Page	.CTRL+J
Show/Hide Colors	.F12
Undo	.CTRL+Z
Zoom In pointer M	.CTRL+spacebar
Show/Hide Guides	.F7
Modify	.CTRL+M
Thumbnails	.SHIFT+F6

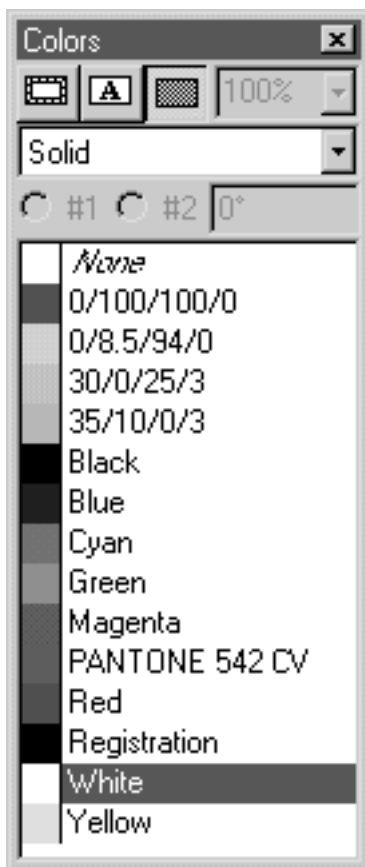
1 Set up the document and Colors palette to apply background colors:

Choose **Page → Go to**. Enter 3 in the field and click **OK**.

If you've closed the **Colors** palette, choose **View → Show Colors**.

Using the Item tool  or the Content tool , select an item on the document page to activate the **Colors** palette.

Click the background icon  at the top of the **Colors** palette.



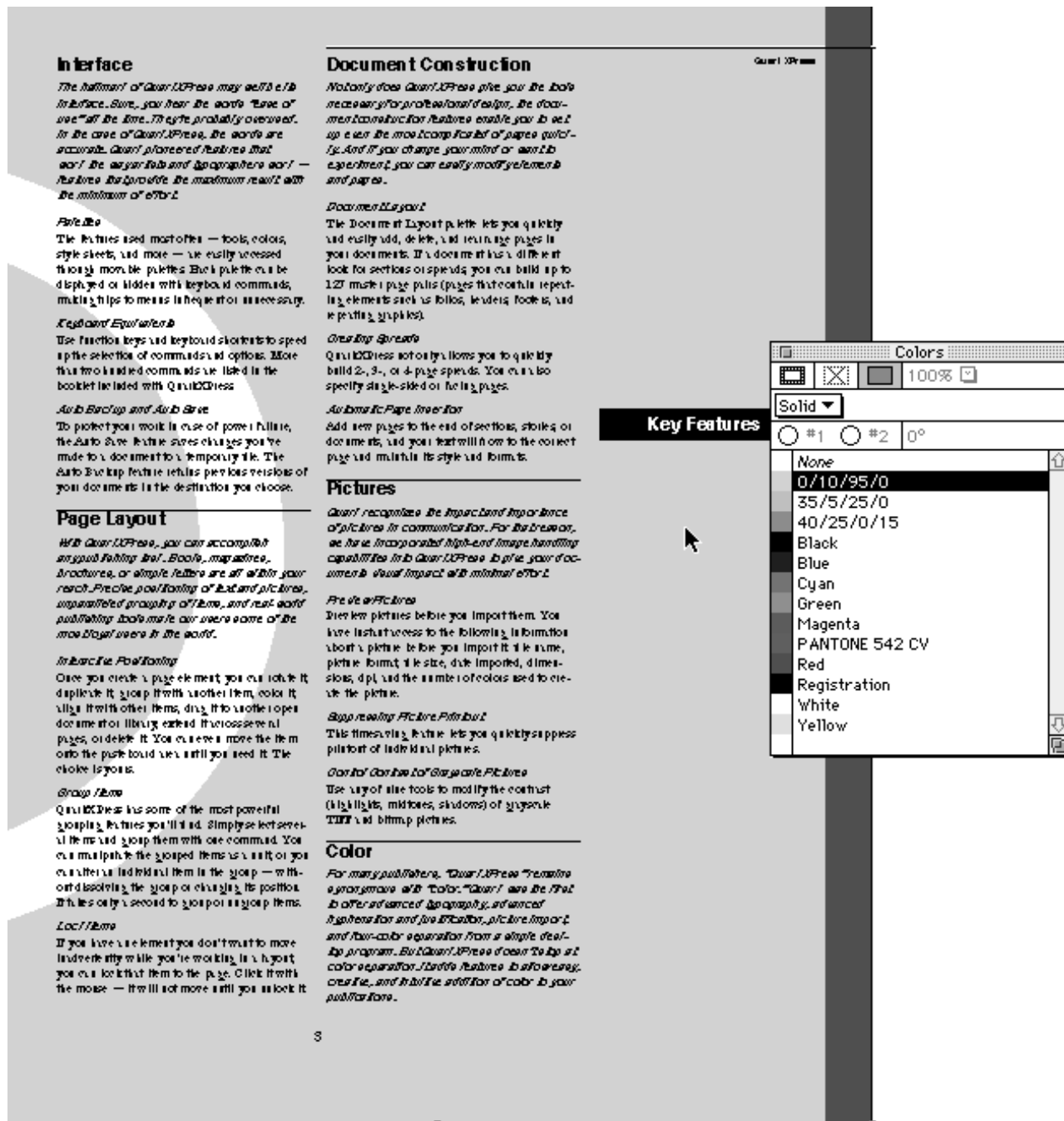
The **Colors** palette applies colors according to the selected icon: frame , text , text paths , picture , line , or background . The palette's center icon changes depending on whether text, a picture, or a line is selected.

2 Use the “color swatch drag” technique to apply colors to box backgrounds: Click the mustard/yellow color swatch 0/10/95/0 in the **Colors** palette and drag it over the large background box on page 3.

Release the mouse button to apply the color. (A white half-circle graphic already existed in this layout; coloring the box behind it made it visible.)

!!! If only the text box changes, drag the swatch toward the margin until the entire background changes color.

Select the tall, narrow box on the right edge of the page. Click the PANTONE 542 CV color swatch, then drag it over the selected box.



When the background icon  is selected on the **Colors** palette, you can experiment with and apply colors by dragging color swatches.

3 Click names in the Colors palette to color additional box backgrounds:

In this step, select an item, then click its color name in the Colors palette.

If you make a mistake, choose **Edit** → **Undo**.

Page	Box	Color Name	Visual Color
1	Yellow box	Pantone 340	Green
1	Cyan boxes	Pantone 542	Blue
7	Background	35/5/25/0	Light green - gray background
7	Right edge	0/10/95/0	Mustard/yellow
8	Background	40/25/0/15	Purple-blue/gray

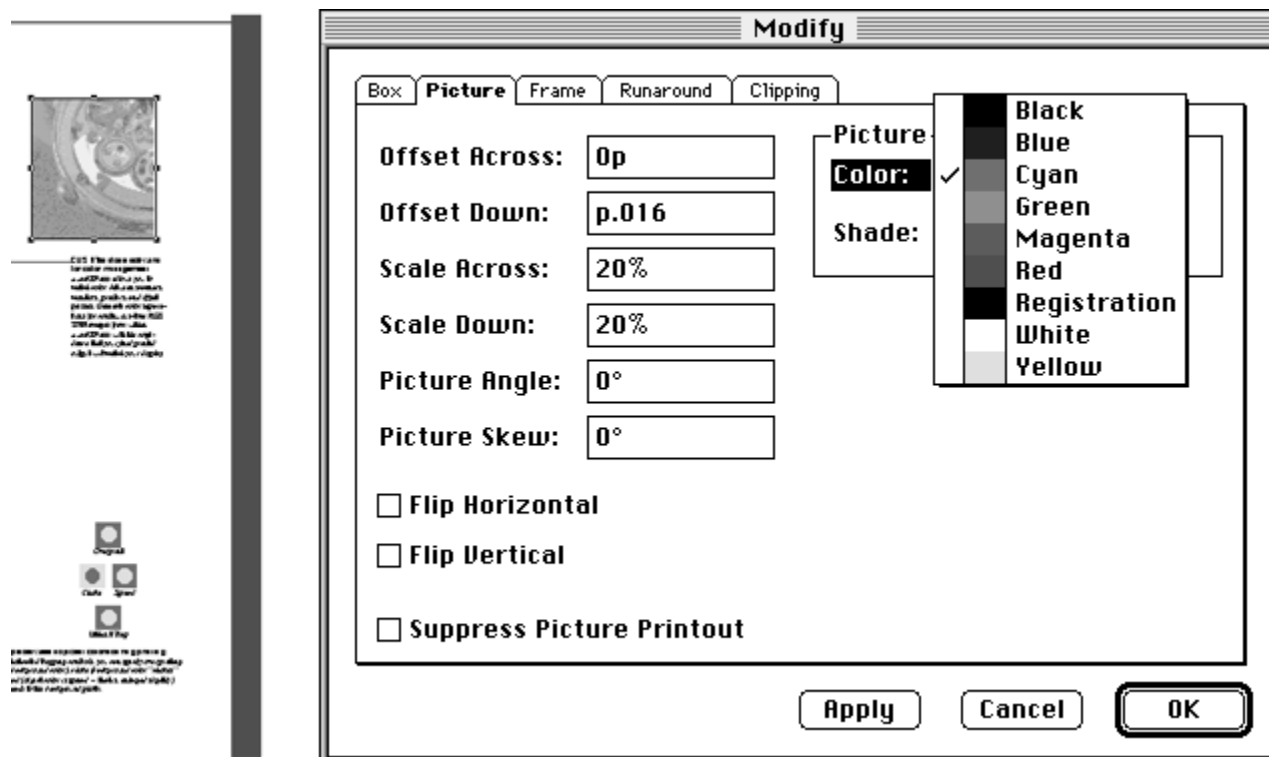
Choose **View** → **Hide Colors** to close the Colors palette.

4 Apply a color to a grayscale TIFF using the Modify dialog box: Choose

Page → **Go to**. Enter 5 in the field and click **OK**. Select the gears picture in the upper right corner of page 5.

Choose **Item** → **Modify**, then click the **Picture** tab.

Choose **Cyan** from the **Color** menu and click **OK**.

5 Select the tall, narrow box on the right edge of page 5. Click the 35/5/25/0 color swatch, then drag it over the box.

The **Picture** tab in the **Modify** dialog box lets you apply colors to b&w and grayscale TIFFs.

- 6** | **Change the color of the introductory text in the screen shot spread:**
Choose **Page** → **Go to**. Enter 4 in the field and click **OK**.

Select the Zoom tool  and click the red box at the top of the page to enlarge it.

Select the Content tool , click to select the red text box, then highlight the entire paragraph.

Choose **Style** → **Color** → **Black**.

- 7** | **Edit the color in the “callout heads” paragraph style sheet:** Change the document view so you can see most of the screen shot spread. Notice the black headings on the callouts.

Choose **Edit** → **Style Sheets**.

Select **A 6 Callout Heads** and click **Edit**.

In the **Character Attributes** area, click **Edit**.

Choose **Color** → **Red** and click **OK**.

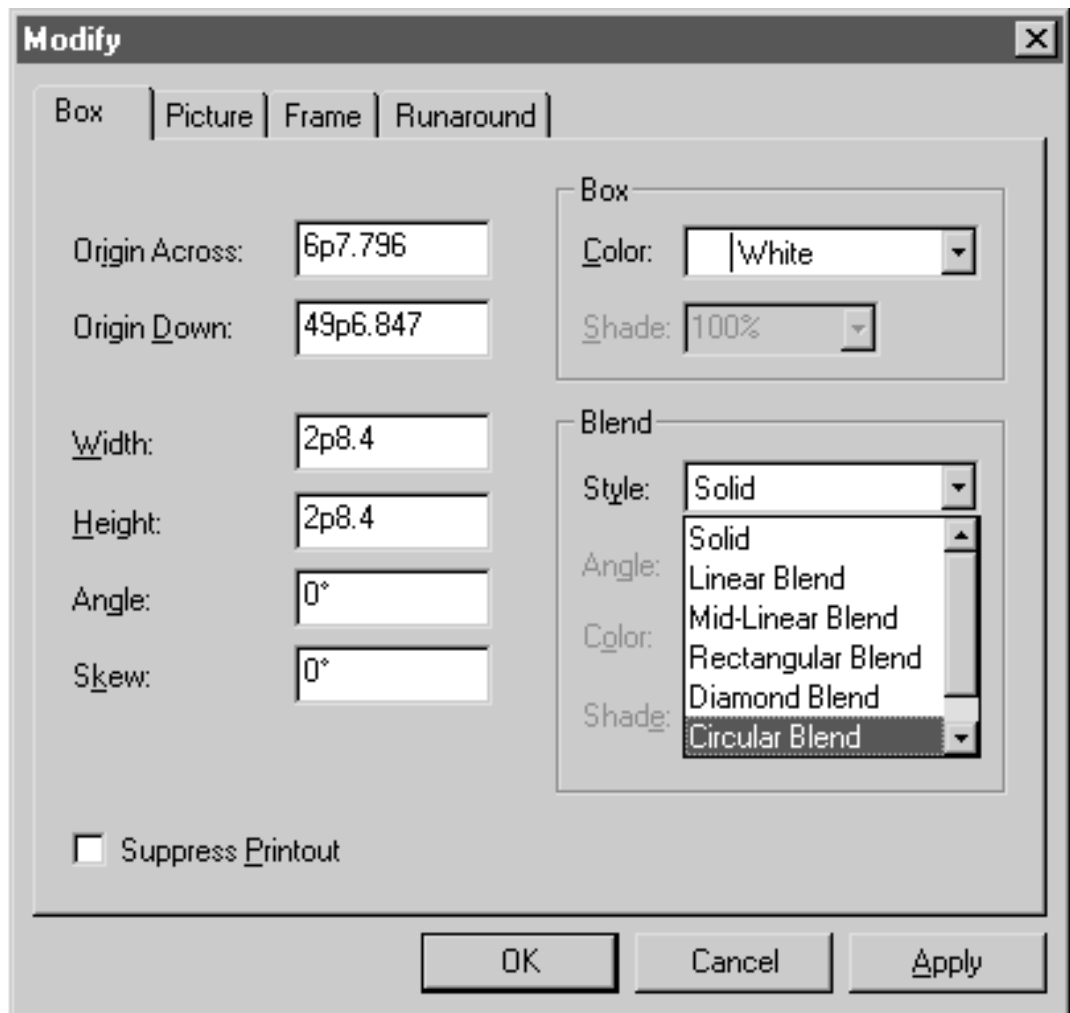
Click **OK**, then click **Save**.

- 8** | **Finish creating the sample blends in the screen shot spread:** Select the Zoom tool  and marquee the four blue circles on the left side of page 4.

Choose **View** → **Show Guides**. You’ll see the outlines of two additional circles placed there to display the remaining two blend types.

Using the Content tool , click to select the first white circle. Choose **Item** → **Modify**; click the **Box** tab if it’s not displayed.

In the **Box** area, choose **Cyan** from the **Color** menu. In the **Blend** area, choose **Circular Blend** from the **Style** menu and click **OK**.



The **Modify** dialog box lets you create patterned blends for the backgrounds of boxes. The Cool Blends QuarkXTensions software, included with QuarkXPress, adds five additional blend styles to the defaults, solid and linear.

Follow the same steps to create a blend for the last circle box, except choose **Full Circular** from the **Style** menu.

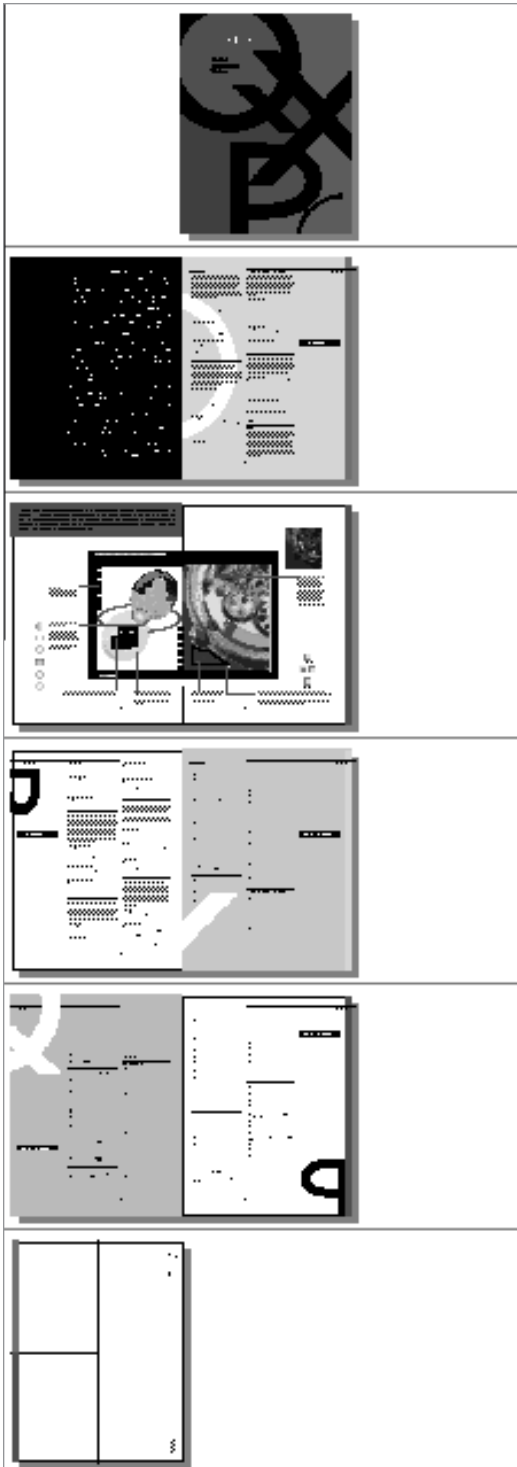
9 | **Change all the blend circles to the same color:** Using the Item tool  or the Content tool , Shift+click or marquee to select all the circles.

Choose **Item** → **Modify**.

Choose **PANTONE 542 CV** from the **Color** menu and click **OK**.

10 Look over the document as a whole: Choose View → Thumbnails.

Look over the document to see if you've colored the correct boxes. You can't edit a document in **Thumbnails** view, so if you need to change something, use a small view percentage like 20%.



The addition of color completes the Features Brochure.

11 Save your changes: Choose **File** → **Save**.

Applying colors automatically: By default, box backgrounds are white and text is black. However, there's no need to continually create white items and black text, then apply colors to them. Character and paragraph style sheets let you specify a color for text. For items, you can modify **Tool Preferences** so specific tools create specific colored items. If you create style sheets or modify **Tool Preferences** when no documents are open, the changes are saved with the application and affect all new documents.

Editing Colors

When you're finishing a document, at some point you'll want to confirm the colors to be sure they'll print. In this task you'll convert a PANTONE color and an RGB color to CMYK for process color printing.



Keyboard Commands for Mac OS:

Colors⌘+F12
Save⌘+S



Keyboard Commands for Windows:

Colors SHIFT+F12
Save CTRL+S

1 Open the Colors dialog box: Choose **Edit** → **Colors**.

2 Convert the PANTONE color to a process color: Select PANTONE 542 CV and click **Edit**. Choose **CMYK** from the **Model** menu and uncheck **Spot Color**.

Enter 76/23/0/9 in the **Name** field to name the color according to its color components.

Click **OK**.

Select PANTONE 340 CV and click **Edit**. Choose **CMYK** from the **Model** menu and uncheck **Spot Color**. Enter 100/0/69/15 in the **Name** field. Click **OK**.

3 Convert Red to a process color: Select **Red** and click **Edit**. Choose **CMYK** from the **Model** menu and uncheck **Spot Color**.

If the color converted to different values, enter the correct values in the fields as follows: **C**: 0, **M**: 100, **Y**: 100, and **K**: 0.

Enter 0/100/100/0 in the **Name** field to name the color according to its color components.

Click **OK**.

- 4** | **Delete extraneous colors from the document:** In the **Colors** dialog box, choose **Colors Not Used** from the **Show** menu.

Shift+click to select **Blue** and **Green**, then click **Delete**. QuarkXPress will not let you delete **Magenta** or **Registration** because they are necessary for printing color separations.

- 5** | **Close the Colors dialog box:** Click **Save**. The edited colors list is saved with the document. Choose **File** → **Save**.



Checking color conversions: When you choose the CMYK color model for a PANTONE color, QuarkXPress converts the color according to the cyan, magenta, yellow, and black values provided in the Pantone Process Color Imaging Guide.

**Checkpoint**

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Create a spot color
- Create a process color
- Edit a color
- Apply colors to different types of items and content

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Create additional CMYK colors.
- Change the color of various boxes on the page.
- Create different types of blends with different colors.



The lesson files are all templates, which means you can open copies of them without affecting the original files.

Color Models

QuarkXPress provides a variety of color models for defining colors. It's up to you which one you use — if you're accustomed to HSB, you can routinely define colors in HSB. Regardless of the color model used to define a color, you can specify whether or not a color separates onto cyan, magenta, yellow, and black plates.

Model definitions

QuarkXPress lets you specify colors using the following color models:

- **HSB** is the color model used by many artists because it resembles the manner in which they mix colors. *Hue* refers to the color or pigment; *saturation* refers to the amount of the color pigment; and *brightness* refers to the amount of black.
- **RGB**, an “additive” color system, is most often used with slide recorders or color video monitors. Red, green, and blue light are added together to represent colors on a video screen.
- **LAB**, or CIELAB, is a color space designed to be independent of differing interpretations imposed by monitor or printer manufacturers. The LAB model in QuarkXPress uses the “D50 illuminant” to be consistent with most usage. The LAB model uses three coordinates: L, A, and B. The L coordinate determines luminance. A complex relationship between the A and B coordinates determines the color itself.
- **CMYK**, a “subtractive” color system, is the color model used by professional printers. Cyan, magenta, yellow, and black inks combine to “subtract” white and reproduce most colors.
- **Multi-Ink** is a special model in QuarkXPress that lets you create one color based on screen percentages of existing process inks and/or spot colors. Before using this feature, consult with your printer or service bureau to make sure the percentages you choose will not cause ink-coverage problems.
- **PANTONE Coated** consists of the PANTONE MATCHING SYSTEMS® colors for printing on coated stock.
- **TOYO** and **DIC** are spot color matching systems popular in Japan.
- The **TRUMATCH** and **FOCOLTONE** matching systems let you specify colors that can be built on-press using the four process colors — cyan, magenta, yellow, and black.
- **PANTONE Process** uses the three process colors of the PANTONE MATCHING SYSTEM with varying levels of black to produce more than 3,000 colors.
- **PANTONE Solid to Process** simulates PANTONE colors with four-color separations for printing on coated paper stock.
- **PANTONE Uncoated** consists of the PANTONE MATCHING SYSTEM colors in solid colors for printing on uncoated paper stock.

- **Hexachrome Uncoated** and **Hexachrome Coated** are new “HiFi” color matching systems from Pantone, Inc. that consist of colors printed with six process plates instead of the usual four. Orange and green are added to the CMYK plates to create more impact and increase the range of reproducible colors. Talk to your printer before using Hexachrome colors.

Spot colors vs. process colors

You can specify two types of color in a QuarkXPress document: spot colors and process colors. When you print a document page that contains spot colors, QuarkXPress outputs all characters, pictures, and items of a given spot color on the same color separation plate. When a document contains items to which you have applied a process color, QuarkXPress separates the color into the appropriate number of process color components (CMYK), and prints a process color separation plate of each color component for every page in your document.

If you use both process and spot colors in a document, QuarkXPress will print multiple separation plates for each page that contains the colors — the cyan, magenta, yellow, and black process separation plates, plus extra plates that contain page elements to which spot colors are applied.



Color output: If you’re just getting started in electronic publishing, don’t start creating colors with abandon and expect them to print. Consult a service bureau or printer as soon as you start planning a color publication. They can offer guidance on how to create colors that will reproduce on-press. Likewise, if you’re creating colors for use in a multimedia project, consult with a multimedia expert before creating colors for viewing on-screen.



Specifying a spot or process color: In QuarkXPress, to specify a spot color, check **Spot Color** in the **Edit Color** dialog box. To specify a process color, uncheck **Spot Color**. Any color you create, regardless of its model, can be defined as a spot color or a process color.

Colors Palette

The **Colors** palette lets you quickly experiment with and apply colors to selected contents and items. To specify what you want to color, select something in the document and click an icon at the top of the palette. Then, simply click a color name in the palette. For example, to change the color of highlighted text to blue, click the text icon  on the **Colors** palette, then click **Blue**.



Icons at the top of the **Colors** palette let you specify the item or contents to color.

Opening and closing the Colors palette

The **Show/Hide Colors** command in the **View** menu is the official method for opening and closing the **Colors** palette. For speed, press F12 to open and close it. If you're using the mouse, click the close box to close the **Colors** palette.

Deciding what to color

You tell QuarkXPress which part of the selected item to color by clicking an icon at the top of the palette. The icons vary depending on the selected item and tool (Item tool  or Content tool ): frame , text or text insertion point , line or text path , background , picture . The small field and menu next to the icons lets you specify a shade for the color.

Creating color blends

The middle row of icons on the **Colors** palette lets you create blends of one color into another. Use the **Type** menu to select the blend style and the **#1** and **#2** buttons to select the blend's beginning and ending colors. To change the blend angle, enter a value in the **Angle** field from -360° to 360° in increments as fine as 0.001° .

Picking colors

Once you've specified what to color, you can apply a color by simply clicking its name in the **Colors** palette. A highlighted color name indicates the chosen color; if various colors are applied to multiple-selected items, no color name is highlighted.

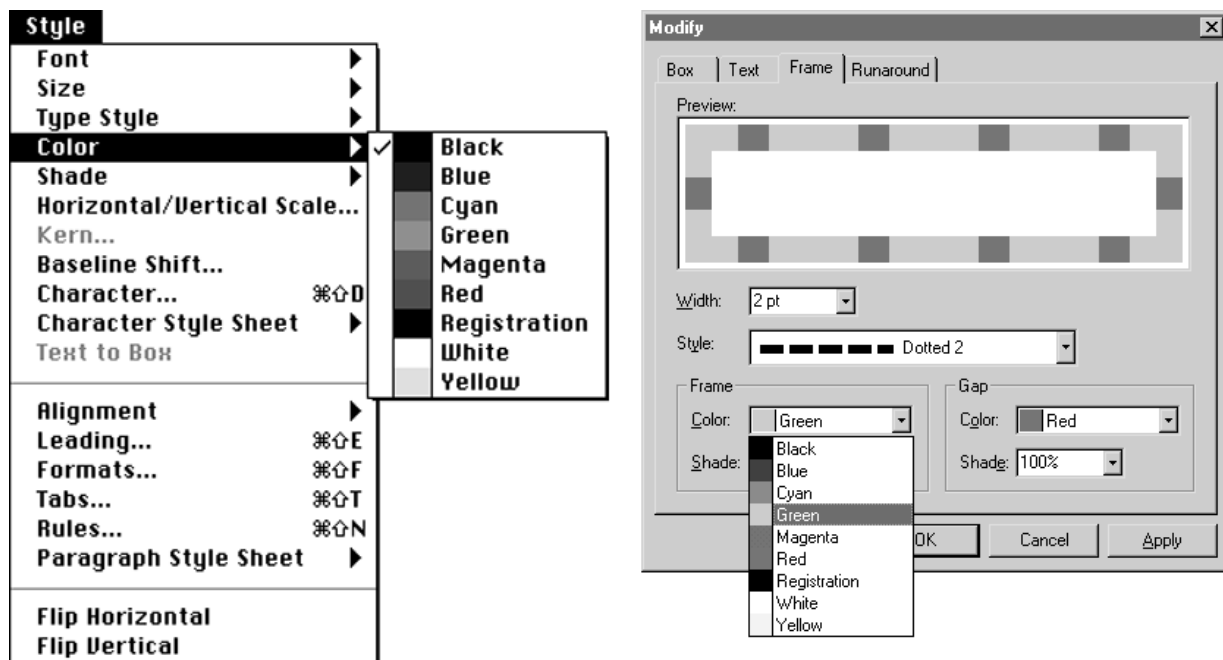
 **Editing a color from the Colors palette:** To edit a color in the **Colors** palette, you can press ⌘ /CTRL while clicking the color name. The **Colors** dialog box displays (**Edit** menu) with that color selected. Press Return/ENTER or click **Edit** to modify the color.

 **Color swatch drag:** You can drag a color swatch (the small box to the left of a color name in the **Colors** palette) onto a frame, line, path, or box background to preview a color change. If you like it, you can release the mouse button and "drop" the color. If you don't like it, you can drag the swatch away.

Applying Colors

QuarkXPress has myriad methods for applying colors — the **Colors** palette, character style sheets, paragraph style sheets, the **Modify** dialog box, the **Character Attributes** dialog box, the **Color** submenus of the **Style** menus, and the **Tool** tab of the **Document Preferences** dialog box. All these places also provide shade controls for specifying color saturation.

The following sections describe how to apply colors to box backgrounds, frames, pictures, text, lines, and text paths. Look in the specific section for the item you want to color.



Various areas of the interface let you apply colors, including the **Style** menu for text and the **Frame** tab of the **Modify** dialog box for box frames and gaps.

Coloring box backgrounds

You can apply a color to a box background using the **Colors** palette or the **Modify** dialog box. Select either the Item tool  or the Content tool .

- **Colors palette:** Select a box and click the background icon  on the **Colors** palette. Then, click a color name or drag a color swatch over the box. To specify a shade, select a value from the menu or enter a percentage value in the field next to the icons at the top of the **Colors** palette.
- **Modify dialog box:** Select a box and choose **Item** → **Modify**. In the **Box** tab, there's a **Box** area where you can choose an option from the **Color** menu. To specify the color saturation, choose an option from the **Shade** menu or enter a more precise value in the field. Click **OK**.

Coloring frames

You can apply a color to the dashes or stripes in a frame using the **Colors** palette. To apply a color to the dashes or stripes *and* the gaps between them, you need to use the **Modify** dialog box. Select either the Item tool  or the Content tool .

- **Colors** palette: Select a box and click the frame icon  on the **Colors** palette. Then, click a color name or drag a color swatch over the frame. To specify a shade, select a value from the menu or enter a percentage value in the field next to the icons at the top of the **Colors** palette.
- **Modify** dialog box: Select a box and choose **Item** → **Frame** to display the **Frame** tab of the **Modify** dialog box. In the **Frame** area, choose an option from the **Color** menu. To specify the color saturation, choose an option from the **Shade** menu or enter a more precise value in the field. If you choose a dashed or striped pattern from the **Style** menu, the **Gap** area lets you choose a **Color** and **Shade** as well. When you're finished, click **OK**.

Coloring pictures

QuarkXPress lets you apply a color to a black-and-white or grayscale bitmap picture such as a TIFF using the **Colors** palette, the **Modify** dialog box, and the **Style** menu. Select either the Item tool  or the Content tool .

- **Colors** palette: Select a picture and click the picture icon  on the **Colors** palette. Then, click a color name or drag a color swatch over the picture. To specify a shade, select a value from the menu or enter a percentage value in the field next to the icons at the top of the **Colors** palette.
- **Modify** dialog box: Select a picture and choose **Item** → **Modify**. Click the **Picture** tab and choose an option from the **Color** menu. To specify the color saturation, choose an option from the **Shade** menu or enter a more precise value in the field. Click **OK**.
- **Style** menu for pictures: Select a picture and choose an option from the **Color** submenu of the **Style** menu. To specify the color saturation, choose an option from the **Shade** submenu or choose **Other**. Enter a more precise value in the **Shade** field and click **OK**.

Coloring text

QuarkXPress lets you apply color to text using the **Colors** palette, the **Character Attributes** dialog box, and the **Style** menu. Select the Content tool  — color controls for text are not available when the Item tool  is selected. The controls for coloring text apply to text in a box or on a path.

- **Colors** palette: Highlight text or place the Text Insertion bar I where you want to begin typing colored text. Click the text icon  (or  for text on a path) on the **Colors** palette and click a color name. To specify a shade, select a value

from the menu or enter a percentage value in the field next to the icons at the top of the **Colors** palette.

- **Character Attributes** dialog box: Highlight text or place the Text Insertion bar  where you want to begin typing colored text. Choose **Style** → **Character**. Choose an option from the **Color** menu. To specify the color saturation, choose an option from the **Shade** menu or enter a more precise value in the field. Click **OK**.
- **Style** menu for text. Highlight text or place the Text Insertion bar  where you want to begin typing colored text. Choose an option from the **Color** submenu of the **Style** menu. To specify the color saturation, choose an option from the **Shade** submenu or choose **Other**. Enter a more precise value in the **Shade** field and click **OK**.

Coloring lines and text paths

You can apply a color to the dashes or stripes in a line or text path using the **Colors** palette or the **Style** menu. To apply a color to the dashes or stripes *and* the gaps between them, you need to use the **Modify** dialog box. You can select either the Item tool  or the Content tool  to apply color to lines. However, you must select the Item tool  to apply color to a text path — when the Content tool  is selected, color controls for text are available.

- **Colors** palette: Select a line or text path and click the line icon  on the **Colors** palette. Then, click a color name or drag a color swatch over the frame. To specify a shade, select a value from the menu or enter a percentage value in the field next to the icons at the top of the **Colors** palette.
- **Modify** dialog box: Select a line or text path and choose **Item** → **Modify**; click the **Line** tab. In the **Line** area, choose an option from the **Color** menu. To specify the color saturation, choose an option from the **Shade** menu or enter a more precise value in the field. If you choose a dashed or striped pattern from the **Style** menu, the **Gap** area lets you choose a **Color** and **Shade** as well. When you're finished, click **OK**.
- **Style** menu for lines. Select a line or text path. Choose an option from the **Color** submenu of the **Style** menu. To specify the color saturation, choose an option from the **Shade** submenu or choose **Other**. Enter a more precise value in the **Shade** field and click **OK**.



Shortcut to Modify dialog box: When the Item tool  is selected, you can double-click an item or group to display the **Modify** dialog box.



Specifying colors for new items: In addition to applying colors after you create items, you can specify the color of items that individual tools create. For example, you might want all your round text boxes to have a bright red background. To customize tools in this way, double-click any item creation tool to open the **Tool** tab of the **Document Preferences** dialog box. Select the item creation tools you want to edit, then click **Modify**. Choose options from the **Color** and **Shade** menus in the **Box** or **Line** tabs. You can also specify default line and frame styles in **Tool Preferences**. Click **OK** twice, then use your modified tool.



Specifying colors in style sheets: You can specify a default color for text by specifying colors within paragraph and character style sheets. For example, in the unlikely event that you never use black, you can change the Normal character style sheet's color.

3

Working with Text

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3

Working with Text

What's Ahead

QuarkXPress lets you import formatted text from popular word processors, apply formats to individual paragraphs and characters, and create style sheets to automate formatting. The **Style** menu for text provides all the text formatting options, while the **Measurements** palette, keyboard commands, and the **Style Sheets** palette expedite the formatting process.

In this lesson you'll link text boxes to contain the brochure text, create and apply style sheets, and use word processing features such as spell check and **Find/Change**. To see the finished document, which contains additional elements and formatting, open "Text Final.qxt," in the Lesson 3 folder inside the "Module 2" folder.

Linking Text Boxes

You can control the flow of text through a document by manually linking text boxes or by using a QuarkXPress automatic text box. When boxes are linked, text flows through them in a continuous chain. In this task you'll open a partially-completed Features Brochure and link the main text boxes.



Keyboard Commands for Mac OS:

Open	.⌘+O
Save as	.⌘+⇧+S
Zoom	.⌘
Keep tool selected	.⇧+click tool
Save	.⌘+S



Keyboard Commands for Windows:

Open	.CTRL+O
Save as	.CTRL+ALT+S
Zoom	.CTRL+spacebar
Keep tool selected	.ALT+click tool
Save	.CTRL+S

1 | **Open the “Text.qxt” template:** Choose **File → Open**. Open the “Module 2” folder and open the “Lesson 3” folder. Select “Text.qxt” and click **Open**.

!!! | If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

2 | **Save the document in the Student Files folder:** Choose **File → Save as**. Open the Student Files folder and enter a descriptive name like “Text Brochure.qxd.” (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

3 | **Locate the text overflow symbol:** Select the Zoom tool  and marquee the lower right corner of the first page. You'll see the red text overflow symbol  at the bottom of the column.

The text overflow symbol indicates that there is additional text in the story — but it doesn't fit in the current box. To display the entire story, you need to link this text box to additional boxes.

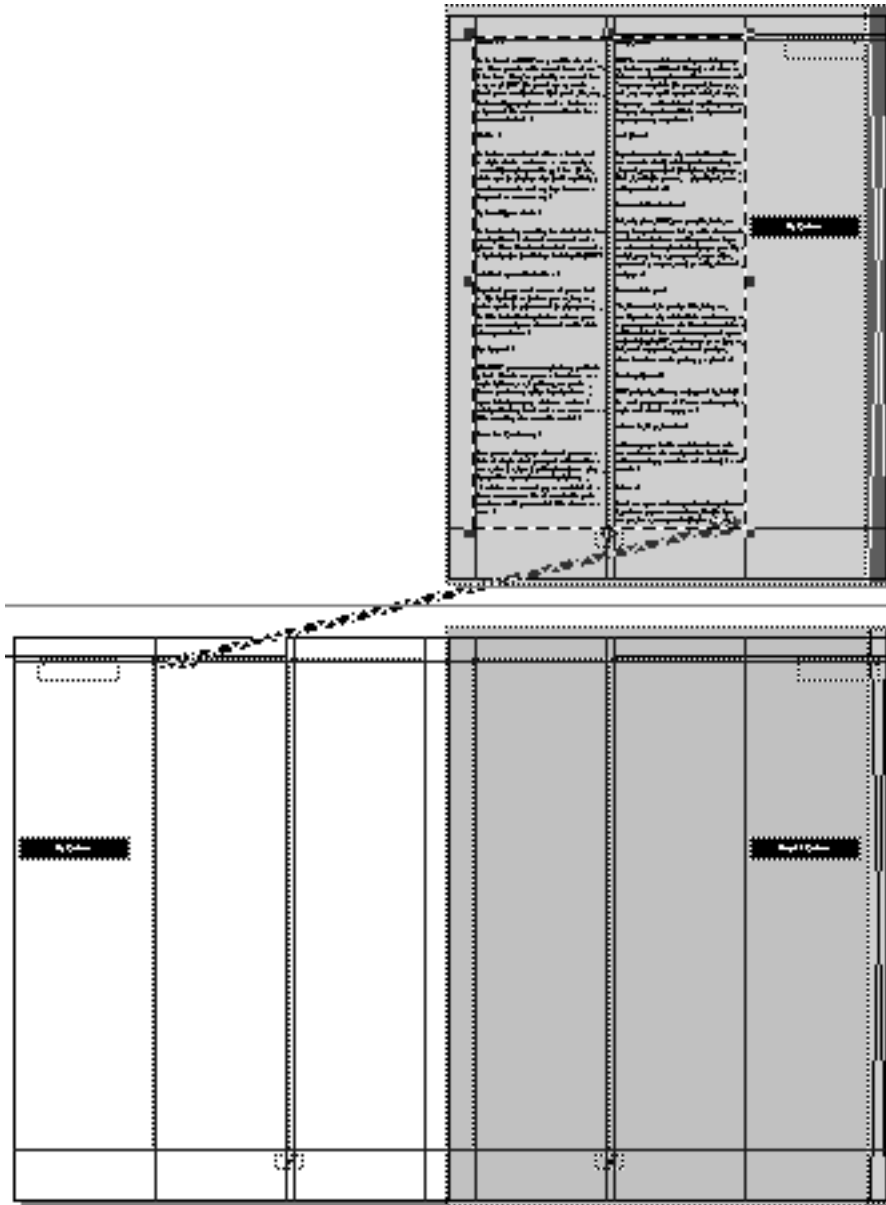
Add new pages to the end of sections, stories, or documents, and your text will flow to the correct page and maintain its style and formats. ¶☒

The text overflow symbol ☒ indicates there is additional text that is not displayed.

4 | **Link the main text boxes on the first two pages:** First, resize your document so you can easily see the entire first and second pages. A 20% view works well for linking these boxes.

Select the Linking tool , then click the pasteboard surrounding the pages to make sure no items are selected. (If you start linking with a text box selected, that box will be the first box in the chain.)

Click the large, two-column text box on the first page, then click the similar text box on the second page. Additional text from the story flows into the second page.



Click to link the first text box to the second text box.

5 | **Link the boxes on the remaining pages:** Press Option/ALT while selecting the Linking tool  again; this will keep the Linking tool selected until you select another tool.

Click to select the main text box on the second page, then click the main text box on the third, fourth, and fifth pages.

Text will flow into the newly linked boxes, but there is still a little text overflow. Don't worry about this; the text will fit when it's formatted properly.

Choose **File** → **Save**.

 | **Text chains and stories:** In QuarkXPress, all the text in a box, or a series of linked boxes, is called a “text chain” or “story” (the terms are synonymous). Even though documents can consist of a single story, they usually contain multiple stories. It's helpful to know how your document is set up when using **Check Spelling** and **Find/Change** because these features give you an option to work with an entire document or a selected story.

 | **Keeping a tool selected:** Most tools in QuarkXPress revert to the Item tool  or Content tool  after you use them. For example, if you select a picture box tool and draw a box, QuarkXPress reverts to the last selected tool (Item or Content) so you can import a picture immediately. The linking tools work the same way. If you want to draw several boxes, or link a series of boxes, press Option/ALT when you select the tool. This will keep that tool selected until you select another.

Formatting Text

QuarkXPress provides a variety of options for formatting individual characters and entire paragraphs. In this task you'll change the leading of the entire text chain, then specify the formatting for heads, subheads, introductory paragraphs, and body paragraphs.



Keyboard Commands for Mac OS:

Select All	⌘+A
Leading	⌘+⇧+E
Other Size	⌘+⇧+\\
Bold	⌘+⇧+B
Character Attributes	⌘+⇧+D
Italic	⌘+⇧+I
Formats	⌘+⇧+F
Justified	⌘+⇧+J



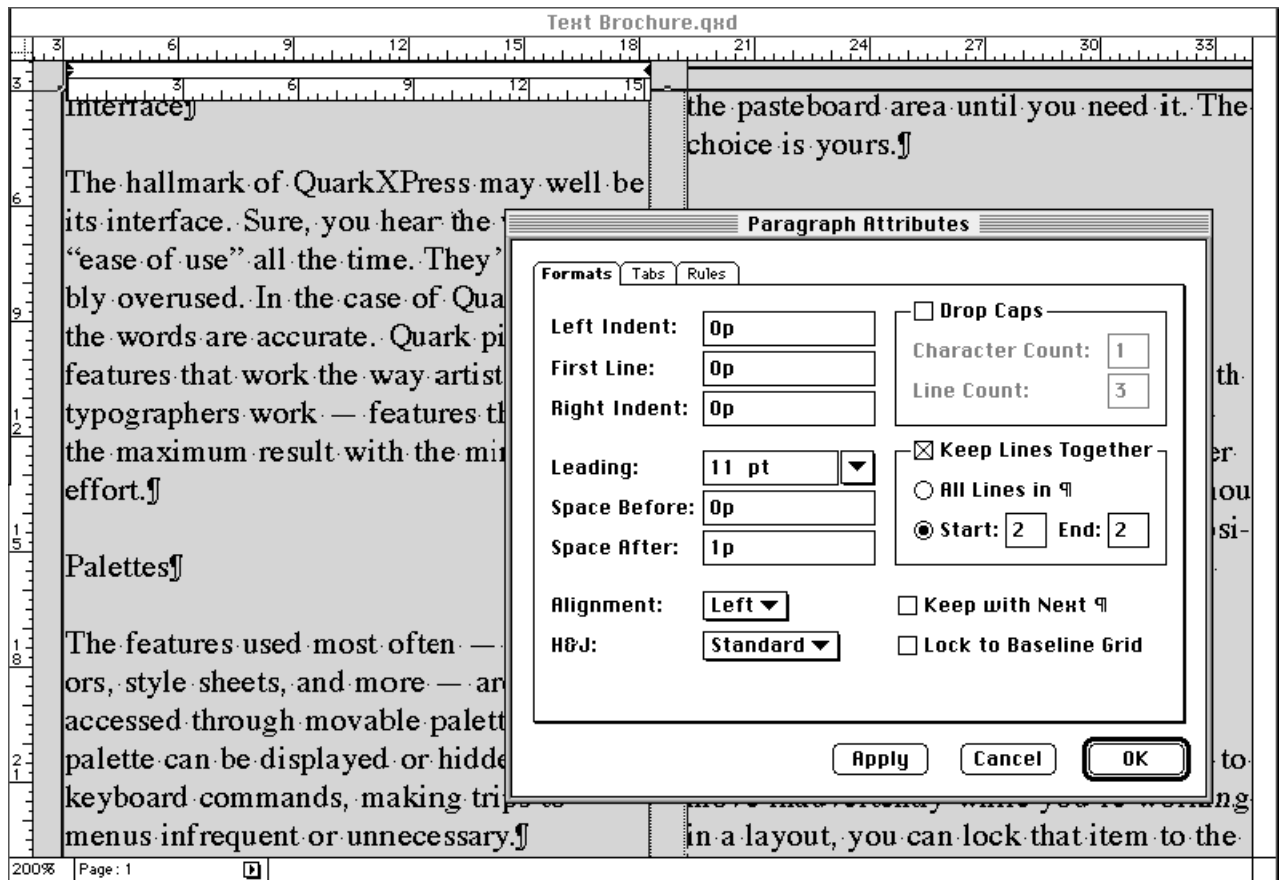
Keyboard Commands for Windows:

Select All	CTRL+A
Leading	CTRL+SHIFT+E
Other Size	CTRL+SHIFT+\\
Bold	CTRL+SHIFT+B
Character Attributes	CTRL+SHIFT+D
Italic	CTRL+SHIFT+I
Formats	CTRL+SHIFT+F
Justified	CTRL+SHIFT+J

1 Decrease the leading of the entire story: Choose **Page → Go to**. Enter 1 in the field and click **OK**. Using the Zoom tool , magnify the upper left corner of the page.

Using the Content tool , click to select the main text box (if necessary). Choose **Edit → Select All**.

Choose **Style** → **Leading**. Enter 11 in the **Leading** field and click **OK**.



Use the **Select All** command to highlight all the text in a story and change its formatting.

2 | **Format a section head using the Style menu:** Using the Content tool , click within the main text box to deselect the entire story. Then, double-click the word “Interface” to highlight it.

Choose **Style** → **Font** → **Helvetica/Arial**.

Choose **Style** → **Size** → **Other**; enter 13 and click **OK**.

Choose **Style** → **Type Style** → **Bold**.

Choose **Style** → **Formats**.

Enter p8 in the **Space Before** field and p4 in the **Space After** field, then click **OK**.

The screenshot shows the **Paragraph Attributes** dialog box with the **Formats** tab selected. The fields are set as follows:

- Left Indent:** 0p
- First Line:** 0p
- Right Indent:** 0p
- Leading:** 11 pt
- Space Before:** p8
- Space After:** p4
- Alignment:** Left
- H&J:** Standard
- Drop Caps:** (unchecked)
- Character Count:** 1
- Line Count:** 3
- Keep Lines Together:** (checked)
 - All Lines in ¶:** (unchecked)
 - Start:** 2
 - End:** 2
- Keep with Next ¶:** (unchecked)
- Lock to Baseline Grid:** (unchecked)

Buttons at the bottom: **Apply**, **Cancel**, and **OK**.

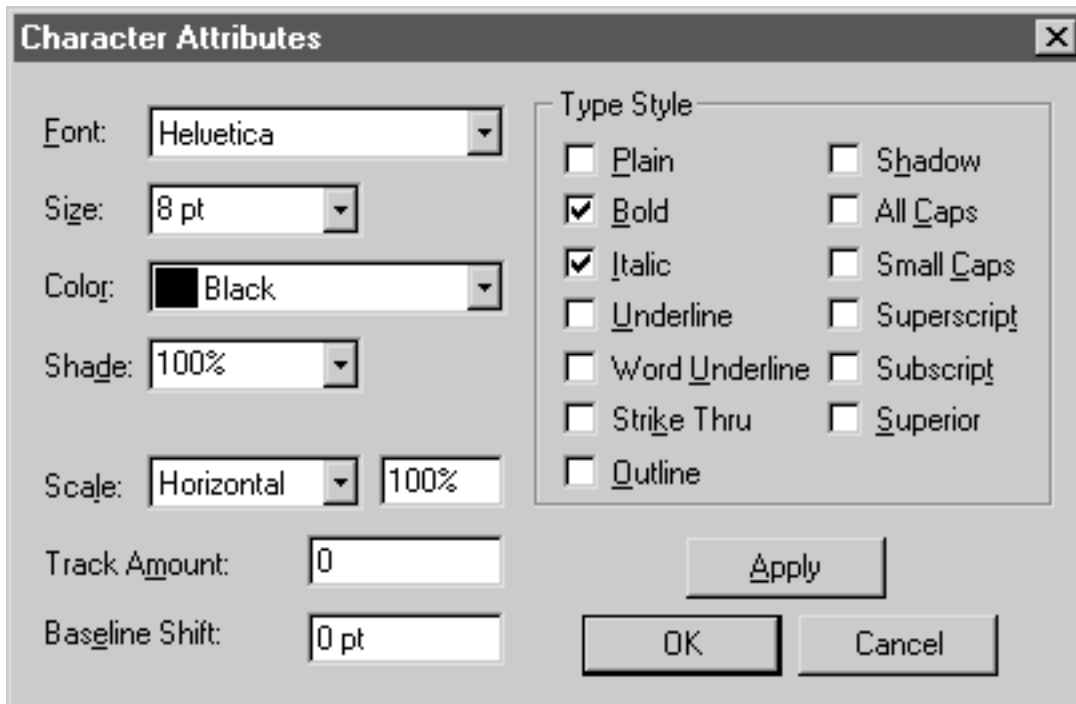
The **Formats** tab of the **Paragraph Attributes** dialog box lets you control indents, line spacing, hyphenation, and many other characteristics of paragraphs.

3 **Format an introductory paragraph using dialog boxes:** Using the  Content tool , highlight all the characters in the first paragraph, which starts with “The hallmark of QuarkXPress,” by clicking four times.

Choose **Style** → **Character**. Enter Helvetica/Arial in the **Font** field.

Enter 8 in the **Size** field.

Check the **Bold** and **Italic** check boxes, then click OK.



The **Character Attributes** dialog box consolidates all the character formatting options in QuarkXPress.

Choose **Style** → **Formats**. Enter p7 in the **Space After** field.

Choose **Justified** from the **Alignment** menu; click OK.

4 **Format a subhead using the Measurements palette:** Using the Content tool , double-click to highlight the word “Palettes.”

In the **Measurements** palette, enter Helvetica in the font field. Tab to the size field and enter 8. Press Return/ENTER.

Click the bold  and italic  icons on the **Measurements** palette.



When text is selected, the right side of the **Measurements** palette provides various character and paragraph formatting options, including a font and size field.

Choose **Style** → **Formats**.

Enter p1 in the **Space Before** and **Space After** fields.

Check **Keep with Next** , then click OK.

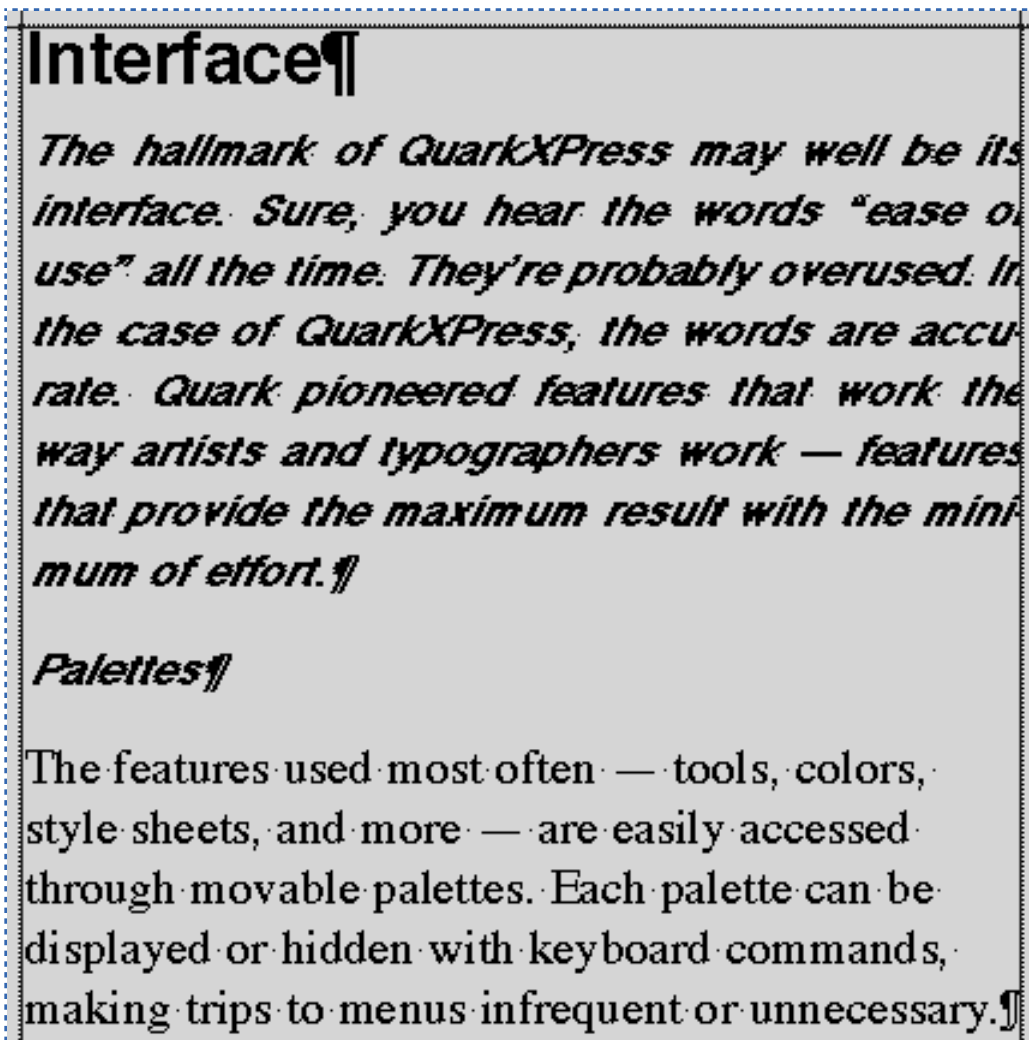
- 5** Format a paragraph of body text using keyboard commands: Using the Content tool , click four times to highlight the second paragraph, which starts with “The features used most often.”

Mac OS

Press $\mathbb{C}$ +Option+Shift+< to decrease the size one point (to 9 pt). Press $\mathbb{C}$ +Shift+F to display the **Formats** tab (Style menu). Tab to the **Space After** field, enter 5, and press Return. Press $\mathbb{C}$ +S to save the document.

Windows

Press CTRL+ALT+SHIFT+< to decrease the size one point (to 9 pt). Press CTRL+SHIFT+F to display the **Formats** tab. Tab to the **Space After** field, enter 5, and press ENTER. Press CTRL+S to save the document.



After you format a head, an introductory paragraph, a subhead, and a body paragraph, your text should look something like this.

You've now formatted samples of each category of text in the document. In the next task you'll create style sheets from this formatted text and apply the style sheets to the remainder of the story.

 **Paragraph formatting vs. character formatting:** When you're formatting text, QuarkXPress makes an important distinction between paragraphs and characters. **Paragraph Attributes** apply to an entire selected paragraph. QuarkXPress considers a paragraph the range of words and characters existing between hard returns. You can select a paragraph by highlighting it or by simply placing the Text Insertion bar ¶ in it. **Character Attributes** apply only to highlighted text or to the text insertion point. Attributes applied to the text insertion point appear as soon as you start typing.

 **Invisible characters:** If you choose **View → Show Invisibles**, it is easy to notice the paragraph symbols ¶ that indicate hard returns (paragraphs).

Creating and Applying Style Sheets

Once you've formatted sample text in a document, you can combine all the formatting into a style sheet. With style sheets, you can apply multiple paragraph and character attributes to text in one step. In this task you'll create paragraph style sheets from the text formatted in the last lesson and create a character style sheet from scratch.



Keyboard Commands for Mac OS:

Style Sheets dialog box⌘+F11
Show/Hide Style Sheets F11



Keyboard Command for Windows:

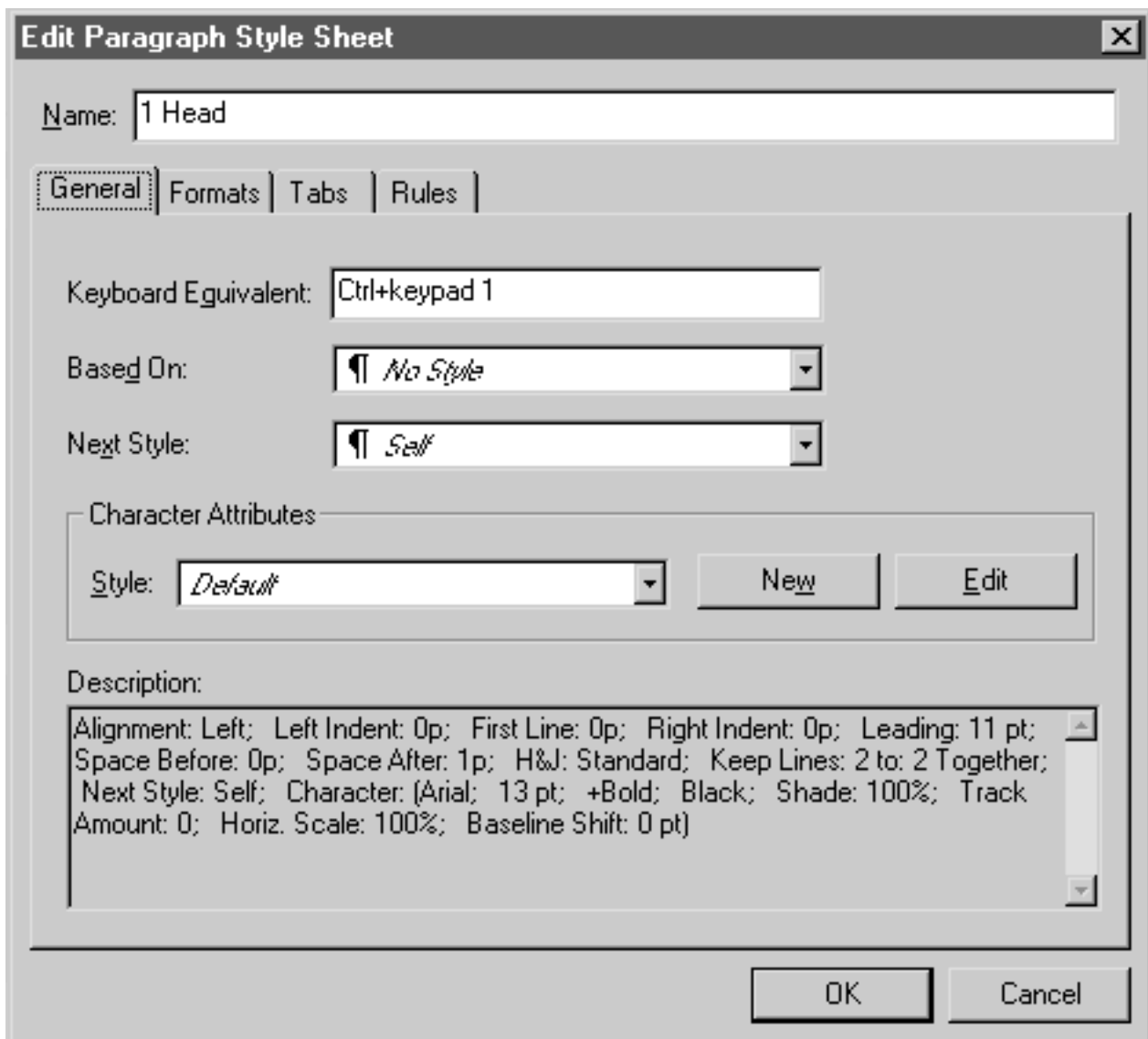
Style Sheets dialog box SHIFT+F11
Show/Hide Style Sheets F11

1

Create a paragraph style sheet for the section heads: Click the Text Insertion bar ¶ in the “Interface” head. Choose **Edit → Style Sheets**.

Click the **New** button until a menu displays and choose ¶ **Paragraph**.

Enter **1 Head** in the **Name** field. Tab to the **Keyboard Equivalent** field and press ⌘/CTRL and the 1 key on the numeric keypad. (You cannot use the number keys above the alphabet for keyboard commands.)



The **Edit Paragraph Style Sheet** dialog box provides access to all the formatting options in the **Paragraph Attributes** dialog box and the **Character Attributes** dialog box.

Click **OK**, then click **Save**.

2 Create paragraph style sheets from the next three paragraphs: Follow the same steps to create a paragraph style sheet from the formatted introductory paragraph, subhead, and body text. Assign the following names and keyboard commands to the style sheets:

Paragraph starting with	Style sheet name	Keyboard equivalent
The hallmark of QuarkXPress	2 Intro Copy	⌘+2/CTRL+2
Palettes	3 Subhead	⌘+3/CTRL+3
The features used most often	4 Body Copy	⌘+4/CTRL+4

- 3** Create a character style sheet from scratch for special word formatting: Choose **Edit → Style Sheets**. Click the **New** button until a menu displays and choose **A Character**.

Enter **5 Features** in the **Name** field. Click in the **Keyboard Equivalent** field and press **⌘/CTRL** and the **5** key on the keypad.

Specify the following character attributes:

Option	Attribute
Font	Helvetica/Arial
Size	9 pt
Color	0,100,100,0 (red)
Scale	Horizontal: 90%
Track Amount	-2

Click **OK**, then click **Save**.

- 4** Apply a style sheet to the first head using the **Style** menu: Click in the first heading, “Interface,” to select it. Choose **Style → Paragraph Style Sheet → 1 Head**. The text doesn’t change because it’s already formatted according to the style sheet.

- 5** Apply style sheets using the **Style Sheets** palette: Choose **View → Show Style Sheets**. To apply paragraph style sheets, click in a paragraph to select it, then click the style sheet name in the **Style Sheets** palette. Apply the style sheets as follows:

Paragraph starting with	Style sheet name
The hallmark of QuarkXPress	2 Intro Copy
Palettes	3 Subhead
The features used most often	4 Body Copy

Again, the text doesn’t change because it’s already formatted according to these style sheets.

- 6** Format the remaining paragraphs using keyboard commands: Use the keyboard commands to format as many of the remaining paragraphs as you wish. Click in a paragraph, then press the appropriate keyboard command.

The style sheets are set up hierarchically: Apply **1 Head** to heads, **2 Intro Copy** to the paragraph immediately following a head, **3 Subhead** to the one-line heads that follow introductory copy, and **4 Body Copy** to paragraphs following subheads.

The text contains the following headings: Interface, Page Layout, Document Construction, Pictures, Color, Typography, Word Processing, Printing, and Additional Features.

Format as many paragraphs as you wish, then continue to the next step. It's not necessary to format the entire document.

7 | **Apply character style sheets:** Double-click to highlight any occurrence of the acronym "QXP." In the **Style Sheets** palette, click 5 Features to apply the character style sheet.

Use the keyboard command for 5 Features to apply it to other occurrences of QXP in the document.

When you're finished experimenting with paragraph and character style sheets, choose **File** → **Save** and continue to the next lesson.

 | **Apply style sheets consistently:** With all the keyboard commands and **Measurements** palette options for quick text formatting, style sheets may not seem that important — especially in shorter documents. However, for any template-driven document such as a newspaper, magazine, or annual report, style sheets are essential. Not only can you apply multiple attributes in one step, but you can edit a style sheet to implement global changes.

 | **Local formatting and style sheets:** When you apply a style sheet, any formatting you previously applied to the text remains. For example, if you apply bold to several words in a paragraph, then apply a new paragraph style sheet, the bold remains. You can also apply formatting in addition to style sheets. For example, after you apply a paragraph style sheet, you might apply additional tracking to copyfit. Formatting in addition to style sheets is referred to as "local formatting."

 | **Removing local formatting:** You can remove local formatting to ensure that text precisely matches the specifications of the style sheet. To remove local formatting, apply *No Style*, then apply a new style sheet. As a shortcut, you can Option+click/ALT+click a style sheet name in the **Style Sheets** palette. This is often referred to as a "clean apply" and works with either paragraph or character style sheets.

Setting Tabs

When you need columns of information to align vertically, it's best to use tabs rather than spaces. In this task you'll create and adjust several types of tabs.



Keyboard Commands for Mac OS:

Tabs⌘+⇧+T



Keyboard Commands for Windows:

Tabs CTRL+SHIFT+T

1 **Separate the data with two tabs:** Choose **Page** → **Go to**. Enter 2 and click **OK**. Locate the tabbed text under the “Typographic Precision” subhead.

Highlight the five lines that make up the chart; the first line starts with “Type size” and the last line starts with “Drop caps.”

Choose **Style** → **Tabs**. The tab ruler displays above the column of text. If you can't see the ruler, drag the **Paragraph Attributes** dialog box out of the way.

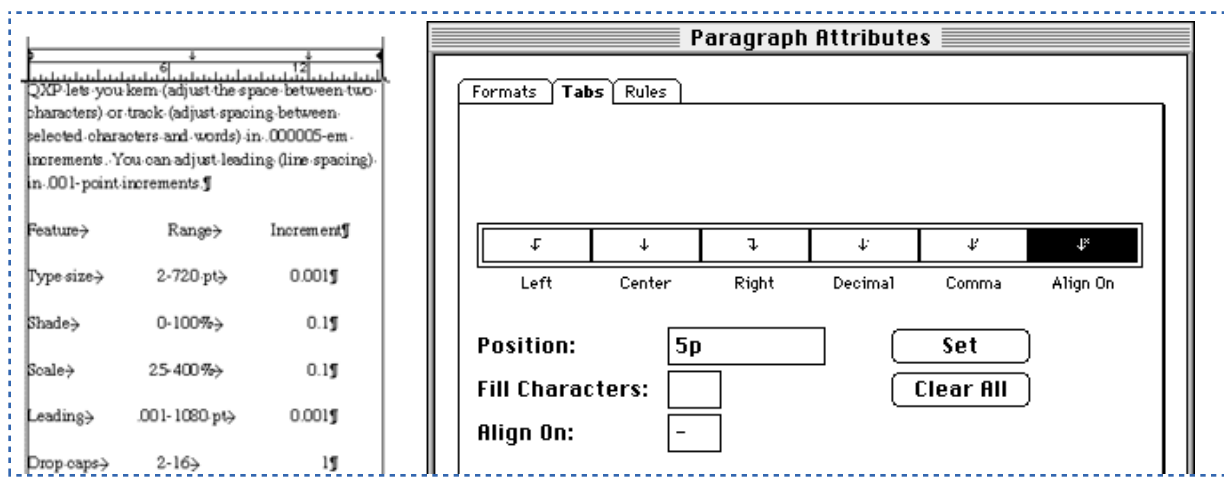
Click on the ruler to create a tab. Drag the tab to about 6p (the **Position** field in the **Tabs** tab updates as you drag the tab).

Create another tab at about 13p, then click **Apply**.

2 **Customize the tab alignment:** Click to select the first tab ↴ on the ruler. Click the **Align On** button in the **Tabs** tab and then enter – (a hyphen) in the **Align On** field.

Click to select the second tab on the ruler. Click the **Decimal** button.

Click **Apply** to check the new alignment, then click **OK**.



QuarkXPress lets you align text to the left, center, or right of a tab stop. You can also align text on a decimal point, comma, or any other printable character.

3 | **Set tabs numerically for the chart headings:** Highlight the first line of the chart starting with the word “Feature.” Choose **Style → Tabs**. Click the **Center** button. Enter 7p in the **Position** field and click **Set**.

Create another tab at 12.5p using the **Position** field and **Set** button.

Click **Apply** to check the new alignment, then click **OK**.

 **Default tab settings:** By default, QuarkXPress places tabs every one-half inch. The first custom tab you create overrides all the preceding .5" tabs, while the following .5" tabs remain. To override all the .5" tabs, set custom tabs all the way across the column.

Checking Spelling

QuarkXPress lets you check the spelling of a word, story, or document against the 120,000 word *XPress Dictionary* file. You can also create custom dictionaries for proper names and industry-specific terms. In this task you'll create an auxiliary dictionary and check the spelling of the entire brochure.



Keyboard Commands for Mac OS:

Check Word⌘+L
 Check Story⌘+⇧+L
 Check Document⌘+⇧+⌘+L



Keyboard Commands for Windows:

Check Word CTRL+W
 Check Story CTRL+ALT+W
 Check Document CTRL+ALT+SHIFT+W

1 Create an auxiliary dictionary for terms specific to the brochure:

Choose **Utilities** → **Auxiliary Dictionary**. Click **New**. Enter a descriptive name like “QXP brochure dictionary” in the New Auxiliary Dictionary field.

Open the “Student Files” folder, then click **Create**. The auxiliary dictionary is automatically linked to the open document.

2 Start the spell check of the entire document: Select the Content tool .

Choose **Utilities** → **Check Spelling** → **Document**.

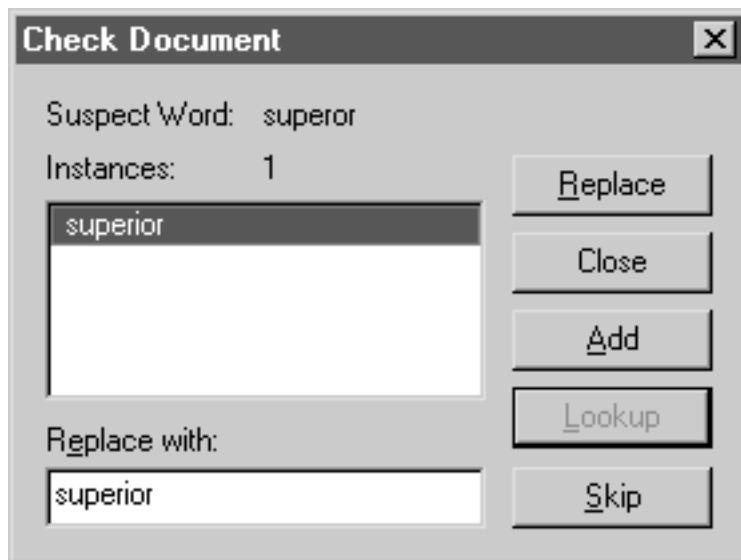
The **Word Count** dialog box reports five Suspect Words; click **OK**.

3 Use the Check Document dialog box to resolve Suspect Words: When

“QXP” is highlighted, click **Skip**. This abbreviation for “QuarkXPress” will be replaced in the next task.

When the terms “midtones,” “pt,” and “CMS” are highlighted, click **Add**. This adds the words to the document’s auxiliary dictionary.

When “superor” is highlighted, click **Lookup**. Select “superior” and click **Replace**.



To change the spelling of a **Suspect Word**, you can use **Lookup** to find a replacement or you can enter a new spelling in the **Replace** with field.

The **Check Document** dialog box closes automatically after resolving the last suspect word.



Entering new spelling: If you click **Lookup** for a **Suspect Word**, and do not find an appropriate spelling, you can enter the correct spelling in the **Replace** with field. To use the current spelling as a starting place, click on the **Suspect Word**; the word will be placed in the **Replace** with field so you can edit its spelling.

Searching and Replacing

The **Find/Change** palette in QuarkXPress lets you do everything from finding a word and replacing it with another to searching for and replacing special characters, style sheets, and attribute combinations. In this task you'll insert "QuarkXPress" for the abbreviation "QXP," then format it appropriately.



Keyboard Commands for Mac OS:

Find/Change⌘+F

Change Find Next to Find First⇧⌘



Keyboard Commands for Windows:

Find/Change CTRL+F

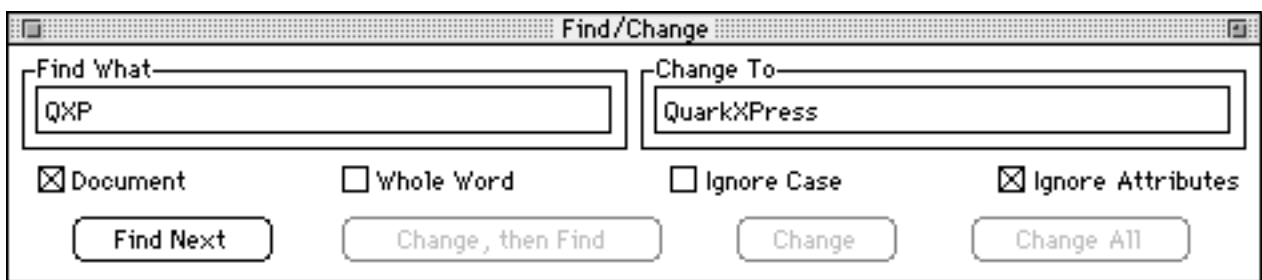
Change Find Next to Find First ALT

1 **Open the Find/Change palette:** Choose **Edit** → **Find/Change**. Make sure **Ignore Attributes** is checked.

2 **Set up the criteria to find "QXP" and replace it with "QuarkXPress:"**
Enter QXP in the **Find What** field and QuarkXPress in the **Change To** field. Uncheck **Ignore Case** to ensure that **Find/Change** uses the capitalization pattern you entered for "QuarkXPress."

Make sure **Document** is checked to search the entire document.

With the Content Tool  selected, click in the Pasteboard so that no text boxes are selected



Find/Change is a palette, which stays open and in front of other windows, allowing you to interrupt a search to edit text.

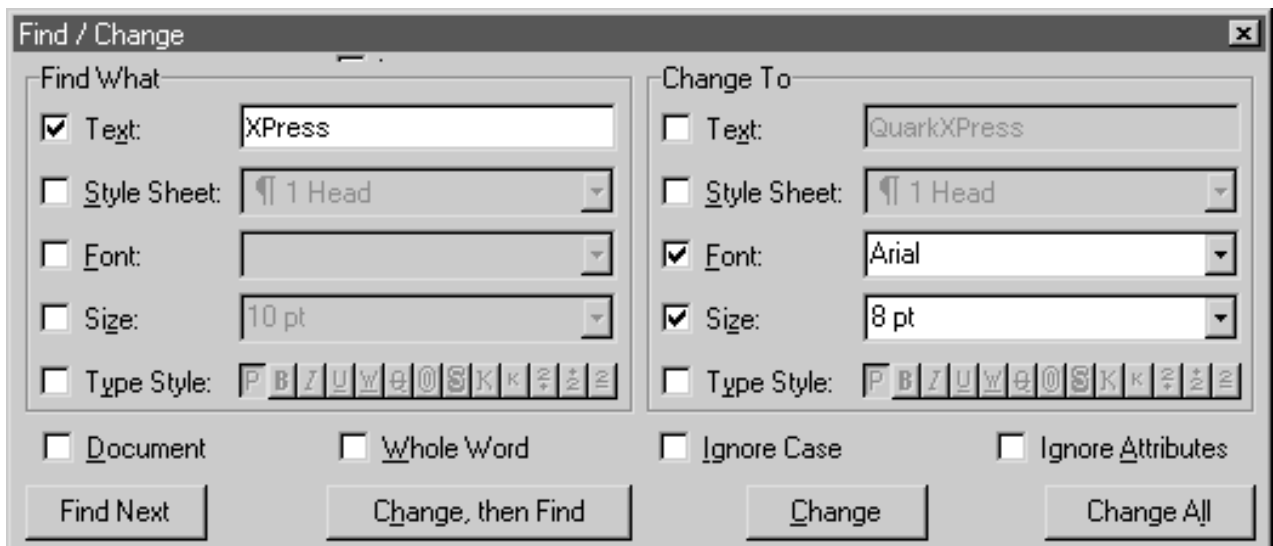
- 3** Test your criteria, then change all instances of “QXP:” Click **Find Next**.
 When an instance of “QXP” is highlighted, click **Change**. Confirm that “QXP” changed to “QuarkXPress” appropriately. If your results are different, compare your **Find/Change** setup to the screen shot in step 2.

Click **Find Next**, then click **Change All**. When QuarkXPress reports how many instances were changed, click **OK**.

- 4** Specify new formatting for the “XPress” half of “QuarkXPress:”
 Uncheck **Ignore Attributes** to display the entire **Find/Change** palette. In the **Find What** area of the palette, check **Text** and enter “XPress.”

In the **Change To** area of the palette, uncheck **Text**. Check **Size** and enter 8 in the field. Check **Type Style** and click the bold icon **B**.

Make sure all the other options in the **Find What** and **Change To** sides of the palette are unchecked.



When **Ignore Attributes** is unchecked, the **Find/Change** palette provides additional options for searching and replacing style sheets and other text attributes.

- 5** | **Change the formatting of “XPress” in the body copy:** Uncheck **Document** and click anywhere in the body copy of the brochure to search only that text chain.

To find the first instance of “XPress,” press Option/ALT while you click **Find Next**. When an instance of “XPress” is highlighted, click **Change**.

Confirm that “XPress” changed to 8 point bold to more closely match the QuarkXPress logotype. If your results are different, compare your **Find/Change** setup to the screen shot in step 4.

Click **Find Next**, then click **Change All**. When QuarkXPress reports how many instances were changed, click **OK**.

- 6** | **Close and save the document:** Choose **File → Close**. If you haven’t recently saved your document, a dialog box asks you to save it. Click **Yes**.

 **Confirming Find/Change operations:** If you’re starting a global **Find/Change** operation, check your search and replace criteria using the **Change** button. The **Change** button replaces the first instance of found text, without continuing the search. You can ensure that your criteria has found the intended text, and that the changes are appropriate, before making global changes to a document with the **Change All** button.

 Checkpoint

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Link text boxes
- Create paragraph and character style sheets
- Set tabs
- Check the spelling in a document
- Search and replace text and attributes

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Create a text chain by linking several boxes on the same page.
- Try formatting text exclusively with keyboard commands, many of which are displayed in the **Style** menu.
- Edit a paragraph style sheet to update formatting in the entire document.
- Use **Find/Change** to replace one paragraph style sheet with another.



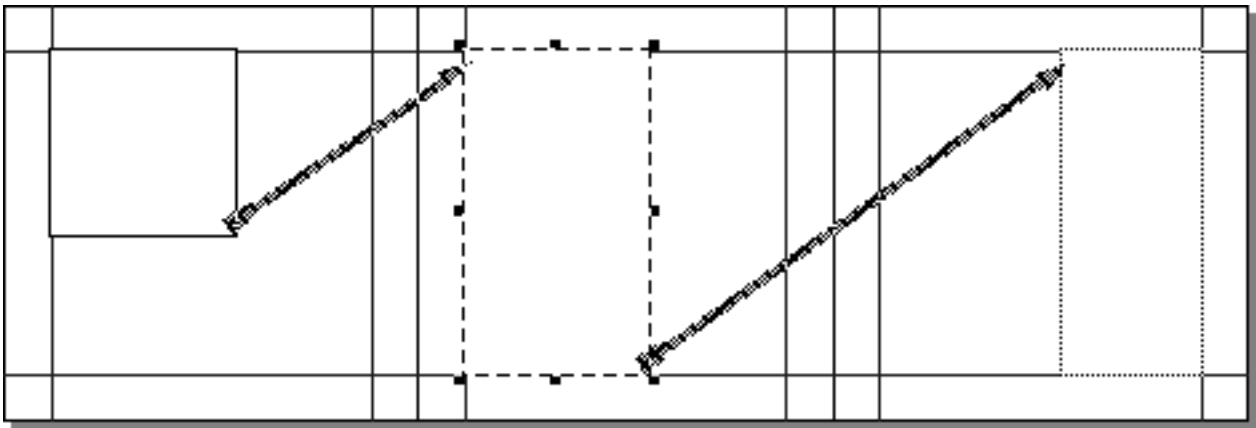
The lesson files are all templates, which means you can open copies of them without affecting the original files.

Text Box Linking

In addition to having an automatic text chain to flow text throughout a long document, you can manually create any number of short text chains. For example, in magazines where advertisements frequently interrupt articles, you can link the boxes on the various pages that contain the story.

Linking text boxes

Make sure no text boxes are selected when you start. To link two boxes, select the Linking tool . Click the box you want to begin the text chain; a marquee displays. Click the box you want to be second in the chain; an arrow indicates the link. The Linking tool  automatically reverts to the Item tool  or the Content tool . To link more than two boxes, press Option/ALT while selecting the Linking tool .



Link boxes together using the Linking  tool. The arrows indicate the sequence of the linked boxes.

Breaking text box links

To break links between boxes, select the Unlinking tool . Click a box that is part of a text chain to display the arrow(s) that indicate links. Click the Unlinking pointer  on an arrow's head or tail feathers. Any text that resided in the box becomes text overflow in the previous box in the text chain.

Rerouting box links

You can remove a box from a text chain of three or more boxes and reroute the links around it. To do this, select the Unlinking tool  and press Shift while clicking the box you want to remove. The text reflows automatically.

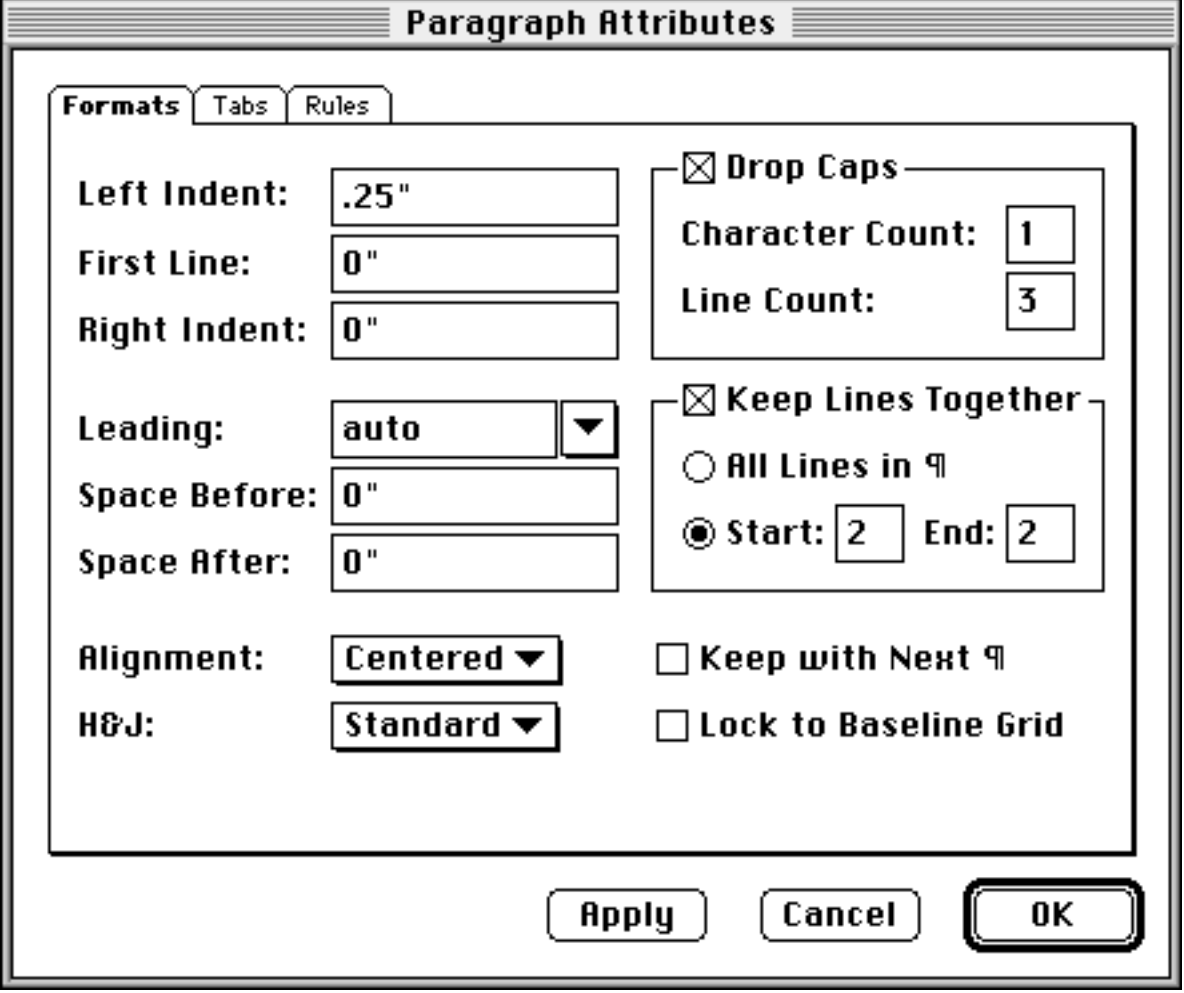


Linking boxes after text is in place: You cannot link a box to a box that already contains text. If you need to combine the text in a series of boxes into one continuous text chain, first cut and paste the text into the first text box (expand the box as necessary). Then, link all the boxes and reflow the text.

Paragraph and Character Attributes

QuarkXPress makes an important distinction between paragraph and character attributes. Paragraph attributes apply to selected paragraphs and primarily involve spacing such as indents, leading, and tabs. To select a single paragraph, click in it; to select a range of paragraphs, highlight them. Character attributes such as font, size, and type styles apply only to highlighted text — or at the text insertion point ¶, to affect text entered thereafter.

Most text attributes available in QuarkXPress are consolidated in the **Character Attributes** and **Paragraph Attributes** dialog boxes (**Style → Character** and **Style → Formats**). You can also access frequently-applied attributes such as alignment and type size through individual **Style** menu commands, keyboard commands, and **Measurements** palette controls.



Paragraph Attributes

Formats | **Tabs** | **Rules**

Left Indent: .25"

First Line: 0"

Right Indent: 0"

Leading: auto ▼

Space Before: 0"

Space After: 0"

Alignment: Centered ▼

H&J: Standard ▼

☒ **Drop Caps**

Character Count: 1

Line Count: 3

☒ **Keep Lines Together**

☐ All Lines in ¶

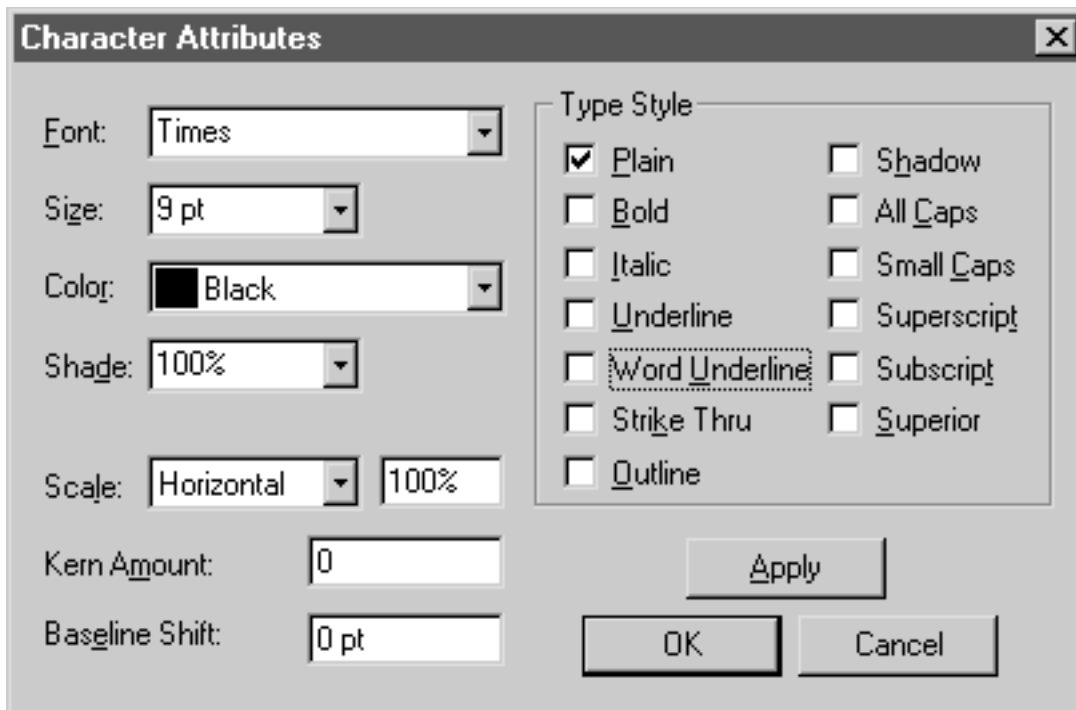
☒ **Start:** 2 **End:** 2

☐ **Keep with Next ¶**

☐ **Lock to Baseline Grid**

Apply **Cancel** **OK**

The **Paragraph Attributes** dialog box consolidates all paragraph formatting controls in QuarkXPress.



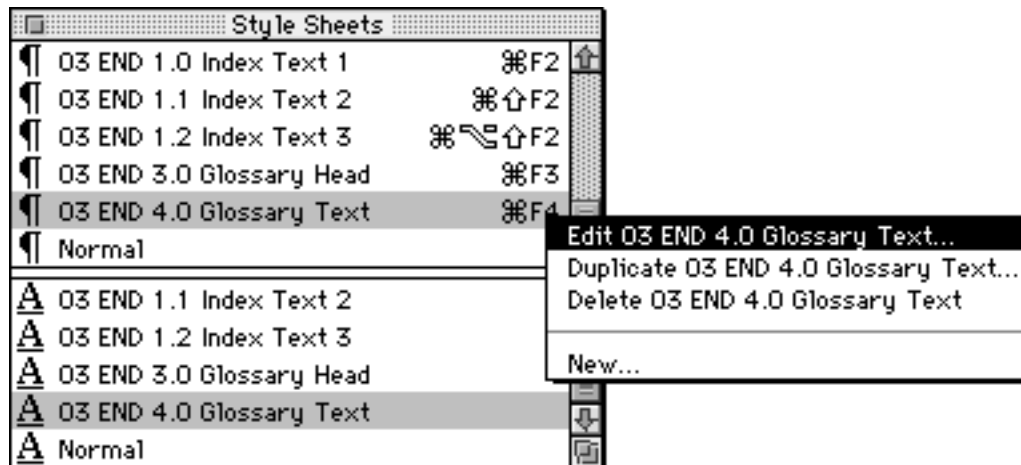
You can find any attribute that you can apply to an individual character in the **Character Attributes** dialog box.

 **Experimenting with attributes:** While the **Paragraph Attributes** or **Character Attributes** dialog box is open, you can experiment with different formatting by clicking the **Apply** button.

 **Flip commands in the Style menu:** The **Style** menu is split into three sections divided by lines: character attributes at the top, paragraph attributes in the middle, and box attributes at the bottom. The box attributes, **Flip Horizontal** and **Flip Vertical**, affect the entire contents of the text box, not just highlighted words or paragraphs.

Style Sheets Palette

The **Style Sheets** palette lets you apply paragraph and character style sheets, view which style sheets are applied to selected text, and display a menu that lets you edit the document's style sheet list.



The top half of the **Style Sheets** palette displays paragraph style sheets, while the bottom half displays character style sheets.

Opening and closing the Style Sheets palette

The **Show/Hide Style Sheets** command in the **View** menu is a straightforward method for opening and closing the **Style Sheets** palette. For speed, press F11 to open and close it. If you're using the mouse, click the close box to close the **Style Sheets** palette.

Applying style sheets

To apply a paragraph style sheet, select a paragraph by clicking in it or select a range of paragraphs by highlighting them. To apply a character style sheet, highlight text or click in the text where you want to introduce the new formatting. Click a paragraph style sheet name (preceded by ¶) or a character style sheet name (preceded by ⌘A) in the **Style Sheets** palette.

Determining which style sheets are applied

The **Style Sheets** palette tells you which style sheets are applied to selected text by highlighting the style sheet names. If the selected text has multiple paragraph and/or character style sheets applied, the appropriate style sheet icons are displayed in gray.

Editing style sheets from the palette

Pressing ⌘/CTRL while clicking a style sheet name opens the **Edit Style Sheet** dialog box. Pressing Control (⌘) while clicking a style sheet name on Mac OS, or right-clicking a style sheet name on Windows, displays a menu that lets you edit, duplicate, or delete that style sheet or create a new style sheet.



Identifying and removing local formatting: Local formatting is any formatting applied in addition to a paragraph or character style sheet. For example, if you apply a style sheet to a paragraph, then bold one word, that word is locally formatted — even if you bold the word using a character style sheet. Whenever highlighted text contains local formatting, or the text insertion bar ¶ is in local formatting, a + (plus sign) displays next to the style sheet name(s) in the **Style Sheets** palette. If you want to remove local formatting as you apply a style sheet, press Option/ALT as you click the style sheet name in the **Style Sheets** palette.

Spell Check

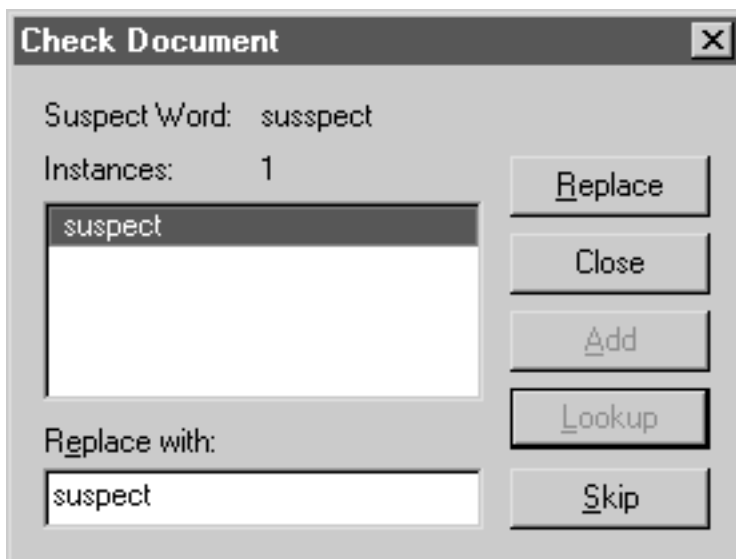
QuarkXPress lets you check the spelling of a single word, a story, a document, or a document's master pages. You can check the text against the *XPress Dictionary* included with QuarkXPress, and against an auxiliary dictionary that you assign to the document. Auxiliary dictionaries are custom dictionaries you create to contain words specific to your projects.

Checking spelling

To check the spelling of a word, highlight it or click in it. To check a story, select a text box containing the story. To check a document, just make sure the Content tool  is selected. Then, choose the appropriate option from the **Check Spelling** submenu of the **Utilities** menu: **Word**, **Story**, or **Document**. To check the spelling on master pages, display a master page (**Page** → **Display**), then choose **Utilities** → **Spelling** → **Masters**.

The resulting **Check Word**, **Check Story**, **Check Document**, or **Check Masters** dialog box identifies “suspect” words, or words that don’t match any words in the *XPress Dictionary* or the open auxiliary dictionary.

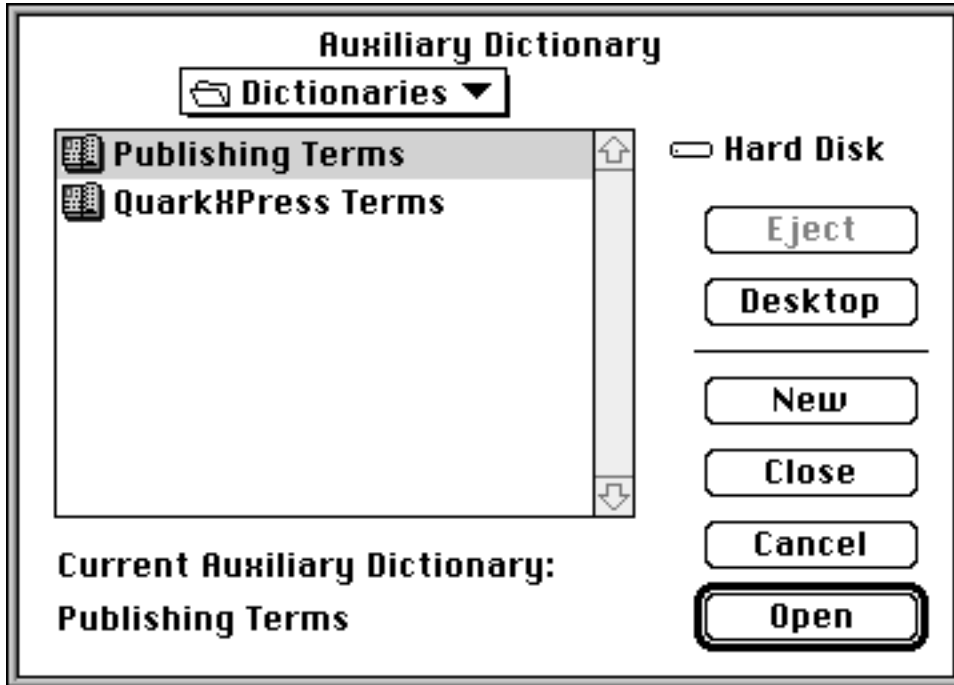
- Use the **Lookup** button to consult the dictionary for the correct spelling of a suspect word.
- Use the **Skip** button to skip all instances of a suspect word (in **Check Story** or **Check Document** only).
- Use the **Replace** button to replace all instances of a suspect word with a selected word in the list or with text in the **Replace with** field.



Use the **Replace with** field to enter new spelling for a suspect word.

Creating and managing auxiliary dictionaries

The **Auxiliary Dictionary** command in the **Utilities** menu lets you create new auxiliary dictionaries, open a dictionary for use with the active document, or close a dictionary that is assigned to the active document. Auxiliary dictionaries are separate files that can be used with multiple documents.



The **Auxiliary Dictionary** dialog box lets you open an auxiliary dictionary to associate with the current document.

Adding words to auxiliary dictionaries

When you first create an auxiliary dictionary, it's empty. You can add words by typing them in the dictionary directly or by adding "suspect" words while you're spell checking.

To add words manually, open the dictionary using the **Edit Auxiliary** command (**Utilities** menu). Enter the new words in the field below the scroll list; click **Add** after each word you enter to add it to the dictionary. Click **Save** when you've finished adding words.



Use the **Edit Auxiliary Dictionary** dialog box to add specialty words like "backups" to the open auxiliary dictionary.

To add words to an open auxiliary dictionary while spell checking, click **Add** in the **Check Word**, **Check Story**, or **Check Document** dialog boxes. Pressing Option+Shift/ALT+SHIFT while you click **Done** automatically adds all suspect words in the story or document to the open auxiliary dictionary.

 **The XPress Dictionary file:** To check spelling, a copy of the *XPress Dictionary* file must be in the same folder as QuarkXPress. When you open an auxiliary dictionary for use with a document, QuarkXPress checks spelling using the words it contains in addition to the words in the *XPress Dictionary*.

Find/Change Palette

The **Find/Change** feature lets you do everything from searching for a word or phrase and replacing it with another, to isolating complex character formatting and changing it. For example, you might find all instances of the word “QuarkXPress” and change the font to Futura ExtraBold.

Specifying the scope of the search

You can perform a search on the active story, an entire document, or a document’s master pages using the **Find/Change** palette (**Edit** menu).

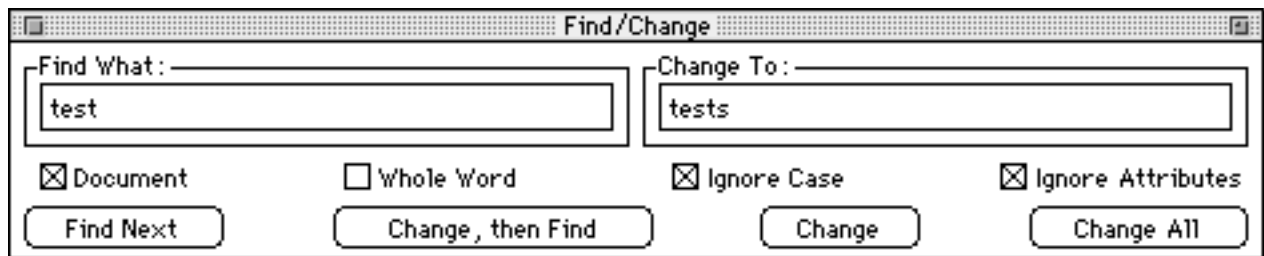
- To search a story, select a text box containing the story and make sure **Document** is unchecked in the **Find/Change** palette. **Find/Change** will search from the location of the text insertion point ¶ to the end of the story.
- To search a document, make sure **Document** is checked in the **Find/Change** palette. **Find/Change** will search all the text boxes and stories in the document, starting from the location of the text insertion point ¶.
- To search master pages, display a master page (**Page** → **Display**). You can select a story to search or check **Masters** to search all the master pages.



To perform a search from the beginning to the end of a story or document, press Option/ALT to change the **Find Next** button to **Find First**.

Using the Find/Change palette

To open the **Find/Change** palette, choose **Edit** → **Find/Change** or press ⌘+F/CTRL+F. To close the palette, click its close box. Since the **Find/Change** controls are in the form of a palette, you can stop and edit text in the middle of a search operation without having to close **Find/Change**.

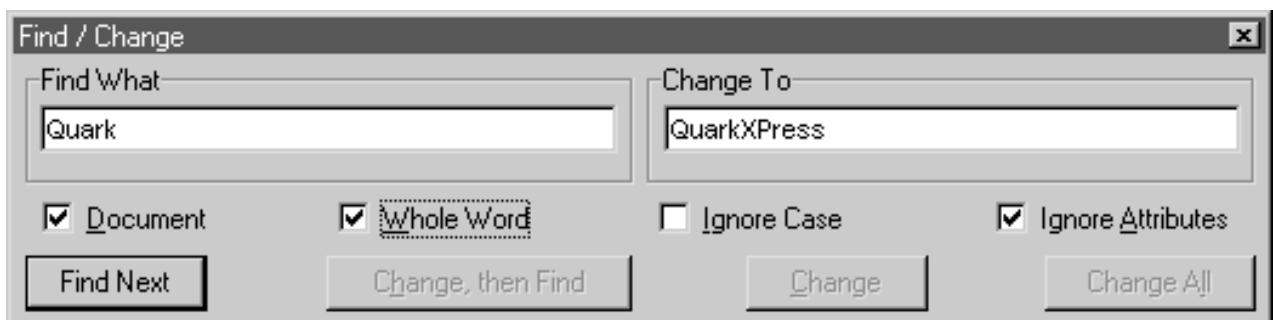


Like any other palette, **Find/Change** stays open and in front of all document windows until you close it.

Text only Find/Change operations

To set up a search for text only, make sure **Ignore Attributes** is checked. Set up the search as follows:

- Enter or paste the text you want to search for in the **Find What** field. You can enter up to 80 characters.
- Enter or paste the replacement text in the **Change To** field. You can enter up to 80 characters in this field. Leave the **Change To** field blank to simply delete occurrences of the **Find What** text.
- Check **Whole Word** when you want the **Find What** text you enter to match only when it occurs as an individual word. For example, if you want to find the word “Quark,” but not “QuarkXPress,” check **Whole Word**. When **Whole Word** is unchecked, QuarkXPress searches for all occurrences of the **Find What** text, even if the characters are part of other words.
- Check **Ignore Case** to search for all uppercase and lowercase variations of the **Find What** text. Uncheck **Ignore Case** to only find exact uppercase and lowercase matches.



The **Find/Change** palette operation shown above only will locate the word “Quark” capitalized and standing alone (it will not find “QuarkImmedia” or “quark”). The word “Quark” will be replaced with “QuarkXPress.”

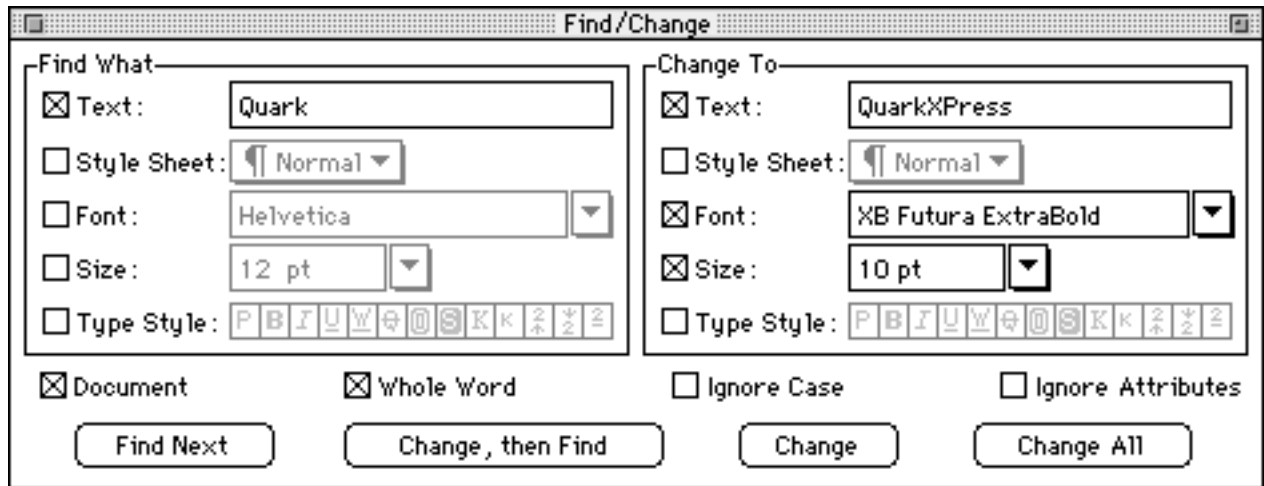
Attributes and/or Text Find/Change operations

To set up a search for text that is formatted with specific attributes, make sure **Ignore Attributes** is unchecked. Set up the search as follows:

- To specify what to find, check **Text**, **Style Sheet**, **Font**, **Size**, and/or **Type Style** in the **Find What** area of the palette. You can find any combination of text and attributes.

Use the fields, menus, and buttons to specify what you want to find. The **Type Style** buttons have three states: off (plain ) , indeterminate (gray ) , and on (reversed ) . If a button is off, that type style must be absent to cause a match. If a button is indeterminate, you can find text whether or not that type style is present. If a button is on, that type style must be present to cause a match. Click a button once for indeterminate and twice for on.

- To specify how to change found text, check **Text**, **Style Sheet**, **Font**, **Size**, and/or **Type Style** in the **Change To** area of the palette. You can change any combination of text and attributes, including simply deleting the text. Use the fields, menus, and buttons to specify the changes to make. The **Type Style** buttons have three states: off (plain ) , indeterminate (gray ) , and on (reversed ) . If a button is off, that type style will be removed if it's currently applied. If a button is indeterminate, that type style will not be removed or applied. If a button is on, that type style will be applied. Click a button once for indeterminate and twice for on.



The **Find/Change** palette operation shown above will ensure that all instances of the word “Quark” in the document are changed to “QuarkXPress” and formatted in 10 point Futura ExtraBold.

Performing a Find/Change operation

Use the buttons along the bottom of the **Find/Change** palette to start the search, replace or skip found text, and continue the search.

- Click **Find Next** to begin finding text matching the criteria you enter. (Press /ALT to change **Find Next** to **Find First**.) **Find Next** also lets you skip any occurrence of found text.
- Click **Change, then Find** to replace the highlighted occurrence of the found text with the **Change To** text and/or attributes, then continue the search.
- Click **Change** to replace the highlighted occurrence of the found text with the **Change To** text and/or attributes. The search does not continue until you click **Find Next**, so you can check the change within the context of the surrounding text.
- Click **Change All** to replace the highlighted occurrence and all subsequent occurrences of the found text with the **Change To** text and/or attributes.



Searching and replacing style sheets: Not only can you find text in any style sheet and replace it with another, but you can find any combination of text and attributes and apply a style sheet to it. For example, you might find all instances of text in **Bold** type style and replace it with a character style sheet that specifies a different color and font as well.



Using a wild card character: To search for a word when unsure of its spelling, you can specify a wildcard character in the **Find What** field by entering ⌘+Shift+?/CTRL+SHIFT+?. The character displays as \? in the **Find What** field. For example, the **Find What** entry Qua\?k would find both Quark and Quack. You cannot enter the wild card character in the **Change To** field.



Searching for “invisible” characters: When you choose **Show Invisibles** from the **View** menu, you see symbols for all the tabs, soft returns, hard returns, etc., in your document. You can search for most invisible characters by pressing ⌘/CTRL while entering the character. For example, to search for a tab, enter ⌘+Tab or CTRL+Tab in the **Find What** field; the symbol “/t” indicates a tab.



Mutually exclusive type styles: The following type styles work in pairs: **Underline** and **Word Underline**, **Small Caps** and **All Caps**, and **Superscript** and **Subscript**. Selecting one deselects the other. For example, the same text cannot be both superscript and subscript.

4

Typography

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4

Typography

What's Ahead

QuarkXPress lets you set global specifications for line spacing, hyphenation, and character spacing, then fine-tune your text to achieve the perfect look. Features such as **Leading**, **H&Js**, **Hyphenation Exceptions**, **Tracking**, **Kerning**, **Keep Lines Together**, and **Keep with Next ¶** provide the precise typography controls you need.

In this lesson you'll change the size and leading of text, create and apply a new hyphenation specification, modify tracking and kerning, and prevent widows and orphans. To see the finished document, which contains additional elements and formatting, open "Sun.qxt," in the "Lesson 4" folder inside the "Module 2" folder and go to its page 8.

Adjusting Leading

Leading is the amount of space between lines, which is usually measured from baseline to baseline. Type size and leading tend to go hand-in-hand, with larger type sizes requiring more leading and vice versa. In this task you'll open a spread of a brochure and modify its leading.



Keyboard Commands for Mac OS:

Open	.⌘+O
Save as	.⌘+⇧+S
Zoom	.⌘
Fit in Window	.⌘+0 (zero)
Select All	.⌘+A
Leading	.⌘+⇧+E



Keyboard Commands for Windows:

Open	.CTRL+O
Save as	.CTRL+ALT+S
Zoom	.CTRL+spacebar
Fit in Window	.CTRL+0 (zero)
Select All	.CTRL+A
Leading	.CTRL+SHIFT+E



1 Open the “Typography.qxd” template: Choose File → Open.

Open the “Module 2” folder, then open the “Lesson 4” folder. Select “Typography.qxd” and click **Open**. A new document based on the template displays.



If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.



2 Save the document in the Student Files folder: Choose File → Save as.

Open the Student Files folder and enter a descriptive name like “typography brochure.qxd” in the field. (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

- 3** Note the current leading in the body text: Using the Content tool , click in the body text and look at the leading  field in the **Measurements** palette, which reads “auto.”



The word “auto” in the leading  field indicates that QuarkXPress is calculating the leading according to the sizes, fonts, and styles used in each line.

Select the Zoom tool  and marquee the lower right corner of the first page.

The inconsistent line spacing is caused by the subscript characters in the fractions. To fix this, you’ll change the leading from auto to absolute.

- 4** Change the size and leading of all the body text: Choose **View → Fit in Window**. Using the Content tool , click in the main text box to select it.

Choose **Edit → Select All**.

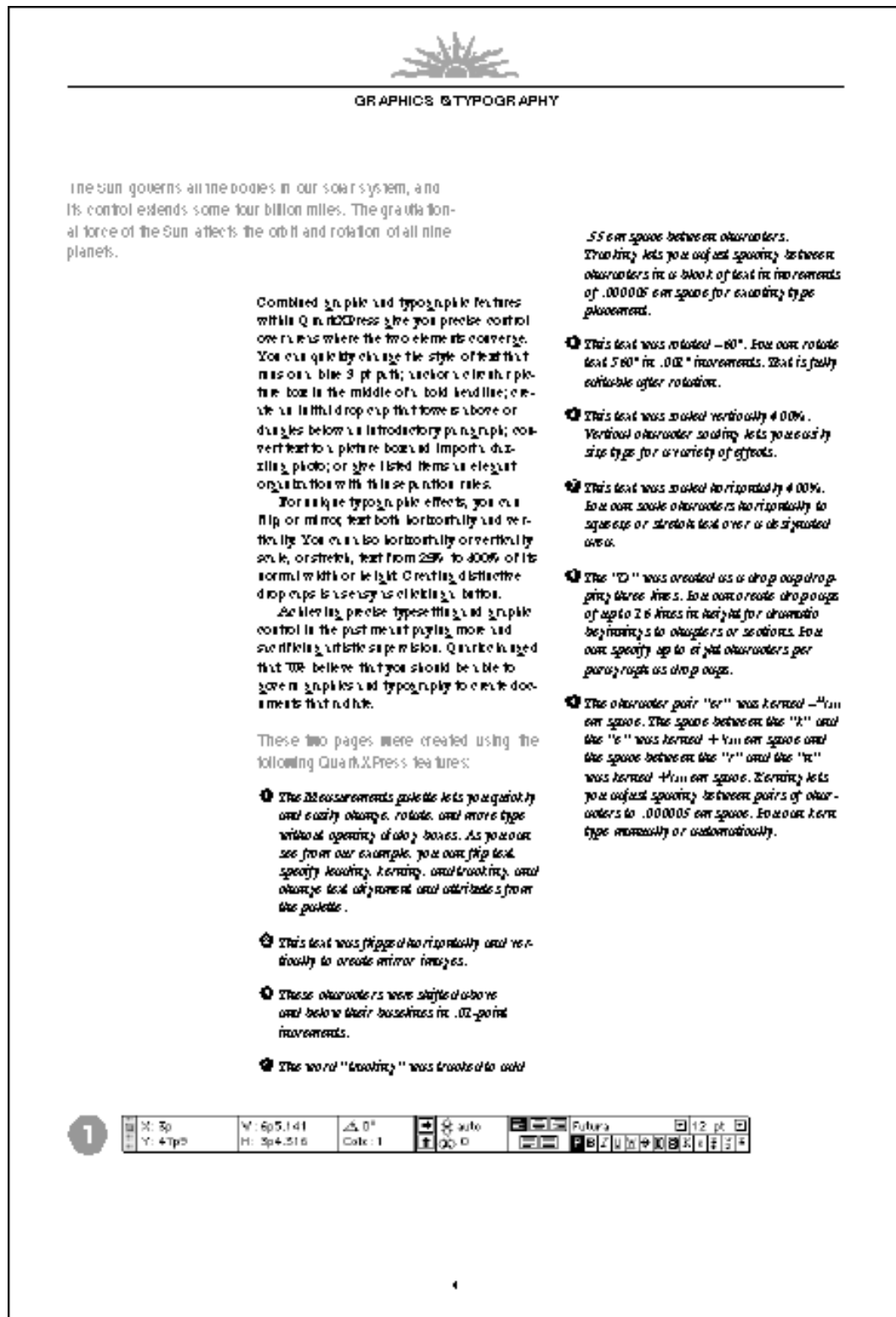
Choose **Style → Size → 9 pt**.

Choose **Style → Leading**. Enter 11 in the **Leading** field and click **OK**.

- 5** Change the leading of the subhead to match the pull quote: Using the Content tool , click in the orange pull quote at the top of the page. Look at the **Measurements** palette to determine its leading: 13 pt.

Click in the orange subhead to select its paragraph.

Click the top leading arrow  on the **Measurements** palette twice to increase the leading by 2 points, making it 13 pt.



After adjusting the leading, your page should look something like this.



Leading terms: baseline, ascent, and descent: To understand leading, you need to understand the following terms:

- **Baseline:** The imaginary line upon which type appears to sit.
- **Ascent:** The value specified by the font designer to indicate the amount of space needed to accommodate a font above its baseline.
- **Descent:** The value specified by the font designer to indicate the amount of space needed to accommodate a font below its baseline.

By default, QuarkXPress defines leading as the amount of space between baselines of type. QuarkXPress uses the ascent and descent values specified by the font designer to help calculate auto leading.



Auto leading: Auto leading calculates line spacing according to the font sizes, ascent and descent values in the fonts, and any baseline shifting (including subscripted characters) in the text. Since auto leading is calculated separately for each line in a paragraph, mixed fonts, sizes, and styles can cause inconsistent line spacing.

Controlling Hyphenation and Justification

In QuarkXPress, you control whether and when text hyphenates at the paragraph level by assigning H&J specifications. In addition to controlling the way words hyphenate, H&Js also control the amount of space between words and characters. In this task you'll create a new H&J specification and apply it to the body text.



Keyboard Commands for Mac OS:

H&Js		.⌘+⌘+H
Select All		.⌘+A
Formats		.⌘+⇧+F
Suggested Hyphenation		.⌘+H



Keyboard Commands for Windows:

H&Js		.CTRL+SHIFT+F11
Select All		.CTRL+A
Formats		.CTRL+SHIFT+F
Suggested Hyphenation		.CTRL+H

1 **Create a new H&J:** Choose **Edit → H&Js**. Click **New**. Enter **Custom H&J** in the **Name** field.

2 **Modify the hyphenation settings:** If necessary, enter 3 in the **Minimum Before** field to prevent a hyphen from occurring after only two characters.

Enter 3 in the **Minimum After** field to prevent a hyphen from occurring if it would leave only two characters remaining.

Check **Break Capitalized Words** to allow the first word of a sentence, proper nouns, etc. to hyphenate.

Enter 2 in the **Hyphens in a Row** field to limit the number of lines ending in a hyphen to two.

Enter 1p6 in the **Hyphenation Zone** field to specify how close to the edge of a column text can get before it hyphenates. This value, which is approximately 10% of the column width, creates a looser edge “rag.”

- 3** **Modify the justification settings:** In the Space area, enter 100 in the **Min.** field, 100 in the **Opt.** field, and 150 in the **Max.** field. In the **Char.** area, enter 5 in the **Max.** field.

	Minimum	Optimum	Maximum
Space:	100	100	150
Char:	0%	0%	5

Although the default justification values are approved by a group of publishers, some typesetters prefer these modified values. Your final H&J should look like this.

Click **OK**, then click **Save**.

- 4** **Apply the new H&J to the body text:** Using the Content tool , click in the main text box to select it. Choose **Edit** → **Select All**.

Choose **Style** → **Formats**. Choose **Custom H&J** from the **H&J** menu.

Click **Apply**. Notice how the text reflows (drag the **Paragraph Attributes** dialog box out of the way if necessary).

!!! If the difference isn't apparent, try choosing **Standard** again and clicking **Apply**. Choose **Custom H&J** again and click **Apply** — the text should shrink up about two lines.

Click **OK**.

- 5** **Prevent an individual word from hyphenating:** Select the Zoom tool  and marquee the second bulleted paragraph, which reads “This text was flipped horizontally and vertically to create mirror images.”

Using the Content tool , click in front of the word “vertically.” Press **⌘+hyphen/CTRL+hyphen** to prevent the word “vertically” from hyphenating.

- 6** **Consult QuarkXPress on how to hyphenate a word:** Click any other multi-syllable word in the document. Choose **Utilities** → **Suggested Hyphenation**. The **Suggested Hyphenation** dialog box shows how the word might be hyphenated, according to the rules in the current H&J.

Click **OK** to close the dialog box.

 **H&Js and typographic “color”:** Hyphenation and justification settings are specified in relationship to other typographic specifications such as the shape and original spacing of the characters, the leading, the width of the column, and the desired ragged edge of a block of non-justified type. H&Js have a noticeable effect on the “color” of a block of type. When viewing a block of type that contains many lines from a distance (often called viewing “en masse”), the lines of type look like a pattern that can be dark or light. Carefully specified H&Js will yield a block of type that, when looked at “en masse,” has a consistent, even “color” without dark blotches or gaping, glaring streaks of white.

Tracking Text

Tracking refers to the amount of space between a selected range of characters, or words. You can specify positive or negative tracking values to adjust the overall character spacing for selected text. In this task you will use three different methods to track text: the **Style** menu, the **Measurements** palette, and keyboard commands.

1 | **Track the page heading using the Track Amount field:** Using the Content tool , click in the text box containing the page heading “Graphics & Typography.” Triple-click to highlight the line of text.

Choose **Style** → **Track**.

Enter 65 in the the **Track Amount** field, then click **OK**.

2 | **Change the spacing in the pull quote using the Measurements palette:** Click in the text box containing the pull quote, which starts with “The sun governs.”

Choose **Edit** → **Select All** or click four times to highlight the paragraph.

Click the justified icon  on the **Measurements** palette.

Click the right tracking arrow  once to track out 10.

!!! | If you press the tracking arrow down, the tracking will continue to increase in increments of 10. If you accidentally track more than 10, click the left arrow or enter 10 in the field and press Return/enter.

3 | **Copyfit the seventh bullet by tracking in using keyboard commands:** Highlight the paragraph in the main text box starting with “7 This text was scaled horizontally.”

On Mac OS, press **⌘+Option+Shift+{** three times to apply a tracking value of –3.

On Windows, press **CTRL+ALT+SHIFT+{** three times to apply a tracking value of –3.

If the word “area” doesn’t track up into the previous line, use the keyboard command to apply additional tracking.



Using tracking for copyfitting: Tracking is commonly used for copyfitting — for example, negative tracking is often used to pull up an orphan (the first line of a paragraph that falls at the bottom of a column). However, excessive tracking can interfere with design and readability. When you're using tracking for copyfitting, consider these guidelines:

- Track whole paragraphs rather than one line or one word.
- Establish tracking guidelines, for example from +3 to -3.
- Make sure vertically adjacent paragraphs have similar tracking applied.

These are general rules; appropriate tracking values depend on the design, font, column width, etc.

Fine-Tuning Kerning

Kerning refers to the amount of space between two characters, rather than a range of characters. QuarkXPress supports automatic kerning based on a font's built-in kerning table, as well as manual kerning so you can adjust kerning as needed. In this task you'll adjust kerning to improve the readability of specific character pairs.



Keyboard Commands for Mac OS:

Character Attributes⌘+⇧+D



Keyboard Commands for Windows:

Character Attributes CTRL+SHIFT+D

1 **Adjust kerning in a fraction in the ninth bullet:** Using the Zoom tool , marquee the paragraph starting with “9 The character pair “er” was kerned ...” Notice the fractions in the paragraph: The slash on either side of the fractions is called a “virgule.” The fractions will look better if you kern the text on either side of the virgule.

9 *The character pair “er” was kerned $-\frac{22}{200}$ em space. The space between the “k” and the “e” was kerned $+\frac{30}{200}$ em*

Kerning lets you adjust spacing between characters for a professional look.

Mac OS

Using the Content tool , click between the “22” and the virgule in the first fraction. Press ⌘+Shift+{ twice to apply a –20 kerning value.

Click between the virgule and the “200” in the first fraction. Press ⌘+Shift+{ once to apply a –10 kerning value.

Windows

Using the Content tool , click between the “22” and the virgule in the first fraction. Press CTRL+SHIFT+{ twice to apply a –20 kerning value.

Click between the virgule and the “200” in the first fraction. Press CTRL+SHIFT+{ once to apply a –10 kerning value.

2 | **Kern the degree sign in the fifth bullet:** Using the Zoom tool , marquee the paragraph starting with “5 This text was rotated –60°.” Using the Content tool , click between the “0” and the degree sign.

Choose **Style** → **Character** to open the **Character Attributes** dialog box.

Enter –10 in the **Kern Amount** field, then click OK.

3 | **On the right-facing page, space the letters in the word “kern” evenly:** Using the Content tool , click between the “k” and the “e” in the word “kern” on the right-facing page.

Highlight the field beside the tracking arrows  on the **Measurements** palette and enter –40, then press Return/ENTER.

Using the same method, apply kerning between the other characters of the word. Try –32 between the “e” and the “r,” and –34 between the “r” and the “n.”



In display type like this, kerning is necessary to adjust awkward spacing.



Accurate kerning: For detailed kerning work, increase your view scale to **400%** or **800%**. Then check the kerning at **Actual Size** within the context of the entire layout. Be sure to confirm the kerning on printed output as well.



Manual and automatic kerning: When **Auto Kern Above** is checked in the **Character** tab of the **Document Preferences** dialog box (**Edit** menu), auto kerning is applied in addition to manual kerning if the point size is larger than the value specified. Manual kerning is always applied whether the check box is or is not checked.

Preventing Widows and Orphans

A widow is the last line of a paragraph that falls at the top of a column. An orphan is the first line of a paragraph that falls at the bottom of a column. In this task you'll control widows and orphans using the **Keep Lines Together** and **Keep with Next ¶** features.



Keyboard Commands for Mac OS:

Formats⌘+⇧+F
Select All⌘+A



Keyboard Commands for Windows:

Formats CTRL+SHIFT+F
Select All CTRL+A

1 Prevent all the paragraphs from breaking across columns: Using the Content tool , click in the main text box on the left facing-page. Choose **Edit → Select All**.

Choose **Style → Formats**.

Check **Keep Lines Together**, then click **All Lines in ¶**.

Click **OK**.

- 2 Prevent the orange subhead from separating from its paragraph:
 Click in the subhead starting with “These two pages were created ...”
 to select it. Choose **Style → Formats**.

The screenshot shows the 'Paragraph Attributes' dialog box with the 'Formats' tab selected. The dialog is divided into two main sections. The left section contains fields for 'Left Indent' (0p), 'First Line' (0p), 'Right Indent' (0p), 'Leading' (auto), 'Space Before' (p10.008), 'Space After' (0p), 'Alignment' (Justified), and 'H&J' (Standard). The right section contains a 'Drop Caps' section with 'Character Count' (1) and 'Line Count' (3), a 'Keep Lines Together' section with 'All Lines in ¶' selected, and a 'Keep with Next ¶' section with 'Start' and 'End' both set to 2. At the bottom, there are 'Apply', 'Cancel', and 'OK' buttons.

The **Keep Lines Together** and **Keep with Next ¶** controls in the lower right corner of the **Formats** tab help prevent widows and orphans.

Check **Keep with Next ¶**, then click OK.

- 3 Close and save the document: Choose **File → Close**. If you haven't recently saved your document, a dialog box asks you to save it. Click Yes.

Checkpoint

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Adjust leading
- Create an H&J specification and apply it to paragraphs
- Specify tracking
- Adjust kerning
- Prevent widows and orphans

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Highlight a range of text and apply auto leading and different absolute leading values to see how the text changes.
- Create several H&Js using the **Hyphenation & Justification** dialog box (**Edit** menu), then apply them to a range of text to see how the text reflows.
- Track or kern text using the **Style** menu, the **Measurements** palette, and keyboard commands; apply both positive and negative values.
- Create columns of text that contain widows and orphans; choose various options for **Keep Lines Together/Keep with Next ¶** in the **Formats** tab (**Style** menu) and observe the results.

!!! The lesson files are all templates, which means you can open copies of them without affecting the original files.

Leading

QuarkXPress defines leading as the vertical space occupied by a line of text, plus any white space between lines. You can specify three types of leading:

- Absolute leading places the amount of space you specify in the **Leading** field between lines regardless of the fonts and sizes used.
- Incremental auto leading combines a base amount of auto leading with an absolute value specified in the **Leading** field. Specify an absolute value by entering a plus (+) or minus (–) sign before the value.
- Entering the word “auto” or a “0” in the **Leading** field tells QuarkXPress to use the value in the **Auto Leading** field of the **Document Preferences** dialog box (**Edit** menu) to decide whether percentage-based or incremental auto leading occurs. The default — percentage-based — takes the base amount of auto leading and adds to it a fixed percentage of the largest font size on the upper line to determine the total amount of leading between an auto-leaded line and the line above it. The default value for percentage-based auto leading is 20%.

!!! Leading is measured from baseline to baseline, unless you set the **Leading Mode** to **Word Processing** in the **Paragraph** tab of the **Document Preferences** dialog box (**Edit** menu). In **Word Processing** mode, leading is measured from the tops of ascenders on one line of text to the tops of ascenders on the line above.

Specifying leading

To specify leading for selected paragraphs, use one of the following methods:

- Choose **Style → Leading**. Enter an absolute leading value, an incremental leading value (preceded by a plus or minus sign), or the word “auto” in the **Leading** field. Click **OK**.
- Select the leading field ⌘ in the **Measurements** palette, enter an absolute leading value, an incremental leading value (preceded by a plus or minus sign), or the word “auto” in the leading field. Or, click the leading icons ⌘ to increase or decrease leading in 1-point increments.
- Press the appropriate keyboard command:

Leading change	Mac OS	Windows
Decrease 1-point	⌘+⌥+;	CTRL+SHIFT+;
Decrease .1-point	⌘+⌥+⌘+;	CTRL+ALT+SHIFT+;
Increase 1-point	⌘+⌥+'	CTRL+SHIFT+'
Increase .1-point	⌘+⌥+⌘+'	CTRL+ALT+SHIFT+'



Relative leading: Auto leading is sometimes called *relative* leading because it spaces each line separately according to the design and size of the fonts used. If fonts or font sizes are mixed and matched, an auto-leaded paragraph may have a different amount of space between each line. Auto leading starts with a base amount of leading, which QuarkXPress determines by looking at the user-specified font size, then calculates the ascent and descent values built into the fonts used in each line.

H&J Specifications

QuarkXPress lets you group hyphenation rules and justification settings into a single specification that you can apply to paragraphs. You can create a number of H&J specifications for a single document. Because H&J is a paragraph attribute, you can apply one set of hyphenation rules and justification settings to some paragraphs, and apply different settings to other paragraphs with different needs. For example, you will probably have different H&Js for headlines, subheads, and body paragraphs.

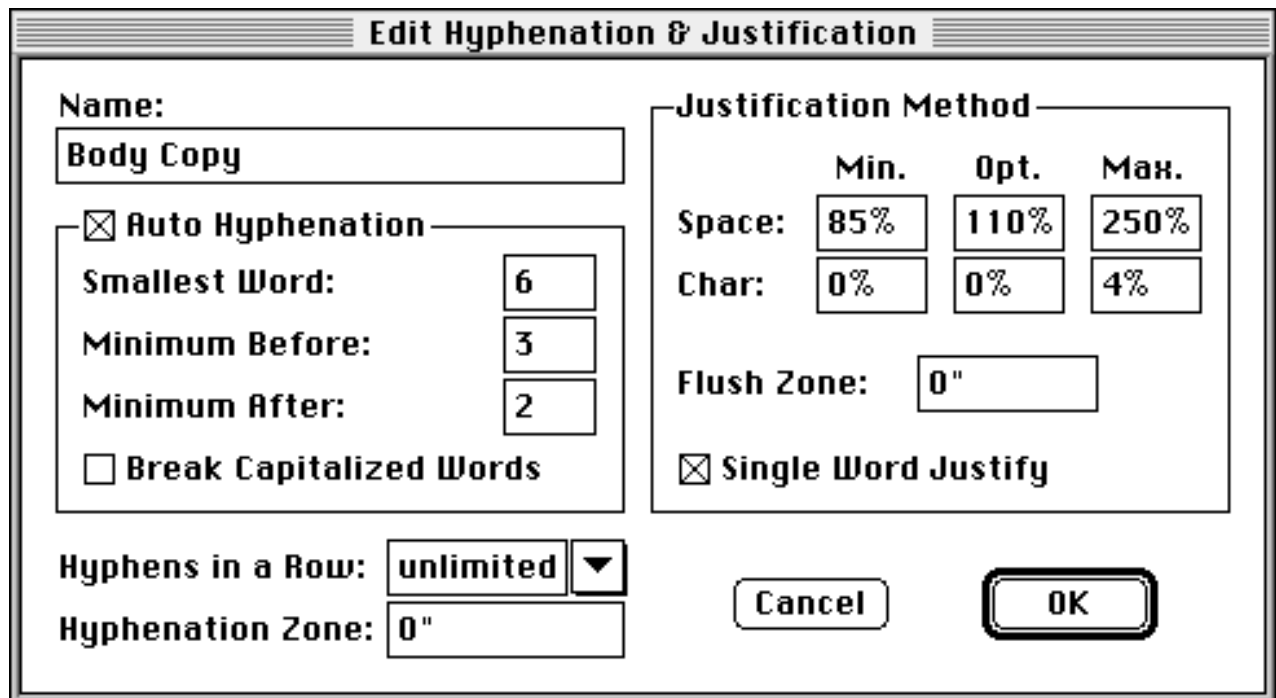
You can edit H&J specifications after they have been applied to paragraphs. When you edit H&J specifications, paragraphs to which they have been applied are reflowed according to the modified hyphenation rules and justification settings.

Creating H&Js

QuarkXPress provides a default H&J called Standard. Standard is the default H&J specified for the Normal paragraph style sheet and for all newly created paragraph style sheets. To create additional H&Js:

1 Choose **Edit** → **H&Js**.

2 Click **New**.



	Min.	Opt.	Max.
Space:	85%	110%	250%
Char:	0%	0%	4%

Flush Zone: 0"

☒ Single Word Justify

Hyphens in a Row: unlimited ▼

Hyphenation Zone: 0"

Buttons: Cancel, OK

Specify H&J variables from the **Edit Hyphenation & Justification** dialog box.

3 Enter a descriptive name for the H&J in the **Name** field. For example, you might name an H&J “Body Copy.”

4 Check **Auto Hyphenation** to have QuarkXPress automatically hyphenate paragraphs to the specifications set in this area.

- **Smallest Word:** Enter a value from 3 to 20 to specify the minimum number of characters a word must contain to be hyphenated.
- **Minimum Before:** Enter a value from 1 to 6 to specify the smallest number of characters that must precede an automatic hyphen.
- **Minimum After:** Enter a value from 2 to 8 to specify the smallest number of characters that must follow an automatic hyphen.
- **Break Capitalized Words:** Check this to enable hyphenation for words that start with an uppercase character (for example, proper nouns and the first words of sentences).

5 Enter a value in the **Hyphens in a Row** field to specify the maximum number of consecutive lines that can end in manually or automatically hyphenated words. If you do not want to limit the number hyphens, choose **Unlimited** from the menu or enter a “0” in the field.

6 Enter a value in the **Hyphenation Zone** field to specify the area within which hyphenation (automatic or manual) can occur. The **Hyphenation Zone** is measured from the right indent to the end of a line of text. **Hyphenation Zone** values apply only to nonjustified paragraphs.

- When you specify a **Hyphenation Zone** greater than 0", QuarkXPress hyphenates a word only when: (1) the previous word ends before the **Hyphenation Zone** and (2) an acceptable hyphenation point falls within the **Hyphenation Zone**. **Hyphenation Zone** values apply only to nonjustified text.
- A **Hyphenation Zone** value of 0" means that there is no **Hyphenation Zone**. In this case, QuarkXPress either hyphenates a word according to the other hyphenation criteria or wraps it to the next line if it will not fit completely on the line.

- 7** Enter values in the **Justification Method** area to specify how words and characters are spaced. The values in the **Min.** and **Max.** fields apply to paragraphs with **Justified** or **Forced** alignment (**Style** → **Alignment**). The values in the **Opt.** fields apply to all paragraphs, regardless of their alignment.

Specify the justification method for H&Js in the **Justification Method** area.

- **Min. Space:** Enter a value in the **Minimum Space** field to specify the minimum amount of space between words in justified paragraphs.
- **Opt. Space:** Enter a value in the **Optimum Space** field to specify the preferred amount of space between words in justified and nonjustified paragraphs.
- **Max. Space:** Enter a value in the **Maximum Space** field to specify the maximum amount of space between words in justified paragraphs.
- **Min. Char:** Enter a value in the **Minimum Character** field to specify the minimum amount of space between characters in justified paragraphs.
- **Opt. Char:** Enter a value in the **Optimum Character** field to specify the preferred amount of space between characters in justified and nonjustified paragraphs.
- **Max. Char:** Enter a value in the **Maximum Character** field to specify the maximum amount of space between characters in justified paragraphs.

- 8 Enter a value in the **Flush Zone** field to specify the area within which the last word in the last line of a justified paragraph must fall in order to be justified. If you enter 1", the last line of a paragraph to which the H&J specification is applied must extend to within 1" of the right indent to be justified.
- 9 Check **Single Word Justify** to specify that a single word on a line in a justified paragraph extend from the left indent to the right indent. If **Single Word Justify** is unchecked, a single word on a line will be left-aligned.
- 10 Click **OK**; then click **Save** in the **H&Js** dialog box.

Applying H&Js

Each paragraph in QuarkXPress has an H&J associated with it, because each paragraph style sheet specifies an H&J. Usually you will specify an H&J that is appropriate to the information in the paragraph — for example, the H&J applied to body text may hyphenate text automatically while the H&J applied to headlines may prevent hyphenation.

To change the H&J applied to selected paragraphs, choose **Style → Formats**. Choose an option from the **H&J** menu and click **OK**.

 **H&Js effect on typography: rivers and color.** When setting text to be justified across a column width, it's necessary to add or subtract space from the original spacing the font designer specified. If excessive space is allowed between *words* when QuarkXPress justifies a line of text, the resulting white space can look like holes or “rivers” of white running between your words and through your paragraph. These white areas can be distracting to comfortable reading. If excessive space is allowed between *characters* when QuarkXPress justifies a line of text, you can end up with one or two words that have been spaced out over a single line of text. These lines often appear at the end of a paragraph, and can look distracting and inconsistent compared to the other lines of text in the paragraph. Based on your H&J settings, when QuarkXPress can't add or subtract space within or around words in a line of text to make the characters fit in a given space, words need to be hyphenated. The hyphenation settings control how far from the end of a line that words can be split by a hyphen. The “color” of a block of type fades away in the ragged hyphenation area, but, as with the non-hyphenating area, a consistent “color” facilitates comfortable reading. Hyphenation areas, or “rags,” can be wide or narrow, but the “color” of the rag remains consistent. Large chunks of glaring, empty white space in a rag that are inconsistent with the lines of text above and below are called a “rough rag.”



Adding discretionary hyphens: In addition to hyphenating text automatically, you can control line breaks and text flow by inserting manual, or discretionary hyphens (⌘+hyphen/CTRL+hyphen). Discretionary hyphens are inserted only when words are broken at the ends of lines.



Discretionary hyphens in a row: As true with words in general, the **Hyphens in a Row** and **Hyphenation Zone** values specified for a paragraph's H&J also affect the way QuarkXPress hyphenates words in which you have entered discretionary hyphens. If hyphenating a word at a discretionary hyphenation point would violate one of these rules, the word will not hyphenate.



Preventing a word from hyphenating: You can prevent a word from being hyphenated by entering a discretionary hyphen (⌘+hyphen/CTRL+hyphen) immediately before it or by entering the word in your **Hyphenation Exceptions** (**Utilities** menu).



Understanding value fields: The values in the **Minimum**, **Optimum**, and **Maximum Space** fields in the **Justification Method** area are expressed as a percentage of the normal space width in a font. The width of spaces in justified text will vary according to these values. The values in the **Minimum**, **Optimum**, and **Maximum Character** fields are expressed as a percentage of the width of an en space that can be added or removed between characters. The intercharacter spacing of characters other than spaces within justified text will be adjusted to these values.



Justifying last lines: Use **Forced** alignment (**Style** menu) to justify the last line of a paragraph even if it does not fall within the **Flush Zone** specified for the paragraph's H&J. The last line must have a paragraph return after it for this to work. Forced alignment also overrides the **Single Word Justify** setting.

Tracking and Kerning

Tracking lets you adjust the space between highlighted characters and words for copyfitting and special typographic effects. Kerning is the adjustment of space between character pairs. Because of their shapes, certain character pairs look better when kerned. QuarkXPress can perform kerning automatically, and it provides manual kerning controls so you can specify additional kerning between characters.

Tracking text

Tracking lets you adjust the space between highlighted characters and words for copyfitting and special typographic effects. Tracking values are expressed as $\frac{1}{200}$ of an em space.



This example shows 36-point type tracked +20 ($\frac{20}{200}$ em) left, and -20 ($-\frac{20}{200}$ em) right.

A positive tracking value increases the space to the right of each character; a negative value decreases it. When no text is highlighted, **Track** is replaced by **Kern** in the **Style** menu. Highlight the text you want to track, then use any of the following options to apply tracking:

- Choose **Style** → **Track** and enter a value in the **Track Amount** field. Click **OK**.
- Select the tracking field $\diamond$ in the **Measurements** palette, enter a new value, and press Return/ENTER. Or, click the tracking icons $\diamond$ to increase or decrease tracking in $\frac{1}{20}$ -em increments. Press Option/ALT and click the icons to track in $\frac{1}{200}$ -em increments.
- Keyboard commands also let you increase and decrease tracking values:

Change in tracking	Mac OS	Windows
Decrease $\frac{1}{20}$ -em	⌘+⇧+{	CTRL+SHIFT+{
Increase $\frac{1}{20}$ -em	⌘+⇧+}	CTRL+SHIFT+}
Decrease $\frac{1}{200}$ -em	⌘+⌥+⇧+{	CTRL+ALT+SHIFT+{
Increase $\frac{1}{200}$ -em	⌘+⌥+⇧+}	CTRL+ALT+SHIFT+}

Kerning text

Kerning lets you adjust the amount of space between two characters. Kerning values are expressed as $\frac{1}{200}$ of an em space. Because kerning is expressed as a fraction of an em space relative to the font and size of the characters, rather than as an absolute value, kerning adjustments that you apply to a character pair will remain proportional if you later change the font size of the kerned characters.



This example shows the effect of -20 ($-\frac{20}{200}$ em) kerning between the two characters on the left, no kerning in the middle, and $+20$ ($\frac{20}{200}$ em) kerning on the right.

A positive kerning value increases the amount of space between characters; a negative value decreases it. When text is highlighted, **Kern** is replaced by **Track** in the **Style** menu. Place the Text Insertion bar ¶ between the two characters you want to kern, then use any of the following options to apply kerning:

- Choose **Style** → **Kern** and enter a value in the **Kern Amount** field. Click **OK**.
- Select the kerning field ⧻ in the **Measurements** palette, enter a new value, and press Return/ENTER. Or, click the kerning icons ⧻ to increase or decrease kerning in $\frac{1}{20}$ -em increments. Press Option/ALT and click the icons to kern in $\frac{1}{200}$ -em increments.
- Keyboard commands also let you increase and decrease kerning values:

Change in kerning	Mac OS	Windows
Decrease $\frac{1}{20}$ -em	⧻ ⧻ {	CTRL+SHIFT+{
Increase $\frac{1}{20}$ -em	⧻ ⧻ }	CTRL+SHIFT+}
Decrease $\frac{1}{200}$ -em	⧻ ⧻ ⧻ {	CTRL+ALT+SHIFT+{
Increase $\frac{1}{200}$ -em	⧻ ⧻ ⧻ }	CTRL+ALT+SHIFT+}

 **Em space used for tracking and kerning values:** The em space used for tracking and kerning increments is determined by the **Standard Em Space** setting in the **Character** tab of the **Document Preferences** dialog box (**Edit** menu). Check **Standard Em Space** for an em space that is equivalent to the point size of the text (for example, 24-point text has a 24-point em space). Uncheck **Standard Em Space** to use the QuarkXPress defined em space, which is the width of two zeros in a given font. A standard em space is generally smaller than a QuarkXPress em space.

 Keep Lines Together/Keep with Next ¶

QuarkXPress lets you prevent two kinds of typographically undesirable lines known as widows and orphans. Traditionally, a widow is defined as the last line of a paragraph that falls at the top of a column. An orphan is the first line of a paragraph that falls at the bottom of a column. You control widows and orphans using the **Keep Lines Together** and **Keep with Next ¶** features.

Keeping paragraphs together

The **Keep with Next ¶** feature forces a one-line paragraph to flow with the paragraph that follows it. This prevents a subhead from remaining at the bottom of a column when its associated paragraph flows to the top of the next column. If the paragraph is longer than one line, the last line will flow with the next paragraph (unless you also specify **Keep Lines Together** for the paragraph). To specify **Keep with Next ¶**:

- 1** | Select the paragraph that you want to stay with the next paragraph.
- 2** | Choose **Style → Formats**.
- 3** | Check **Keep with Next ¶**. Click **OK**.

Keeping lines together

The **Keep Lines Together** feature specifies whether lines in paragraphs flow together or are separated when they reach the bottoms of columns. This can prevent the first line of a paragraph from remaining at the bottom of a column or the last line from flowing to the top of a column. To specify **Keep Lines Together** for selected paragraphs:

1 Choose **Style** → **Formats**.

2 Check **Keep Lines Together**, and click one of the following options:

- Click **All Lines in ¶** to keep all the lines of a paragraph in the same column or box, rather than breaking at the bottom. The paragraph is treated as an indivisible unit.
- Click **Start** and enter a value in the **Start** field to specify the number of lines to keep together at the bottom of a column or box when a paragraph must be broken. Enter a value in the **End** field to specify the number of lines to keep together at the top of a column or box when a paragraph must be broken.

3 Click **OK**.

 **Widow and orphan prevention in style sheets:** Generally, you will specify **Keep with Next ¶** for your headline and subhead style sheets. If you have two-line headlines and subheads, you may want to specify **Keep Lines Together**, with **All Lines in ¶** checked. Then, you will probably specify **Keep Lines Together** (usually with **Start** and **End** parameters) for your body text style sheets.

5

Combining Type and Graphics

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5

Combining Type and Graphics

What's Ahead

The blurry distinction between typography and graphics increasingly appears when these two worlds collide. For example, imagine a novel: The first chapter beginning with a flourish — a capital letter “T” containing a picture. Or an ad luring your eyes with snaky chains of green text on invisible lines. Or an educational manual containing anchored  graphics flowing in text! Although the distinction isn't as clear (is it text, is it a graphic?), it's a fun place to explore.

In this lesson you'll create graphic-oriented text in a half-completed document. To see the finished document, which contains additional elements and formatting, open “TypeGraphics Final.qxt” in the “Lesson 5” folder inside the “Module 2” folder.

Creating Initial Caps

The first letter in this sentence is an initial cap — an enlarged and embellished letter that draws readers into a paragraph. You can specify automatic drop caps, create your own initial cap effects, and use imported graphics as initial caps. In this task you'll experiment with different ways to create an initial cap.



Keyboard Commands for Mac OS:

Open	.⌘+O
Save as	.⌘+⌘+S
Formats	.⌘+⇧+F
Character Attributes	.⌘+⇧+D



Keyboard Commands for Windows:

Open	.CTRL+O
Save as	.CTRL+ALT+S
Formats	.CTRL+SHIFT+F
Character Attributes	.CTRL+SHIFT+D



1 Open the “TypeGraphics.qxd” template: Choose File → Open.

Open the “Module 2” folder, then open the “Lesson 5” folder. Select “TypeGraphics.qxd” and click **Open**. A new document based on the template displays.



If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

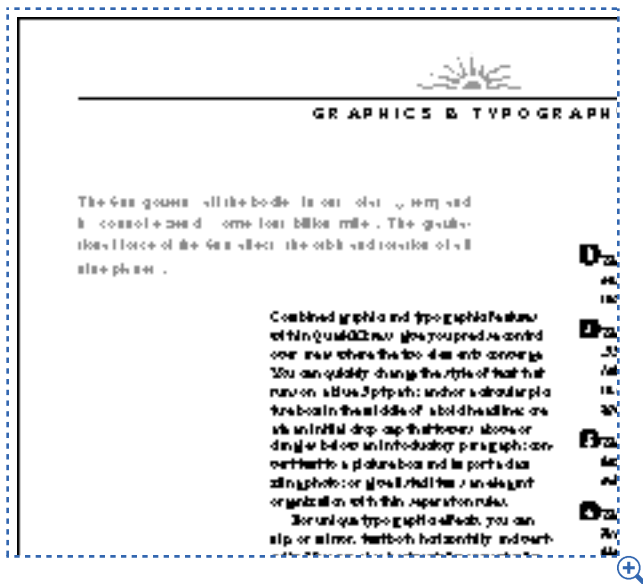


2 Save the document in the Student Files folder: Choose File → Save as.

Open the Student Files folder and enter a descriptive name like “My Graphics.qxd.” (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

- 3** Enlarge the first column of body text on page 1: Select the Zoom tool  and marquee the text.



Zoom into the first paragraph of body text (the black text). You'll make the letter "C" in the word "Combined" into an initial cap.

- 4** Create an automatic drop cap for the paragraph: Using the Content tool , click the first paragraph of text and choose **Style → Formats**. Check **Drop Caps**.

Enter 1 in the **Character Count** field and 2 in the **Line Count** field.

Click **Apply** to view your changes (if necessary, drag the dialog box out of the way).

Uncheck **Drop Caps** (so you can experiment with another type of initial cap), then click OK.

Paragraph Attributes

Formats | Tabs | Rules

Left Indent: 0"

First Line: 0"

Right Indent: 0"

Leading: 11 pt

Space Before: 0"

Space After: 0"

Alignment: Left

H&J: Standard

☒ Drop Caps

Character Count: 1

Line Count: 2

☐ KeeP Lines Together

☐ All Lines in ¶

☐ Start: 2 End: 2

☐ KeeP with Next ¶

☐ Lock to Baseline Grid

OK Cancel Apply

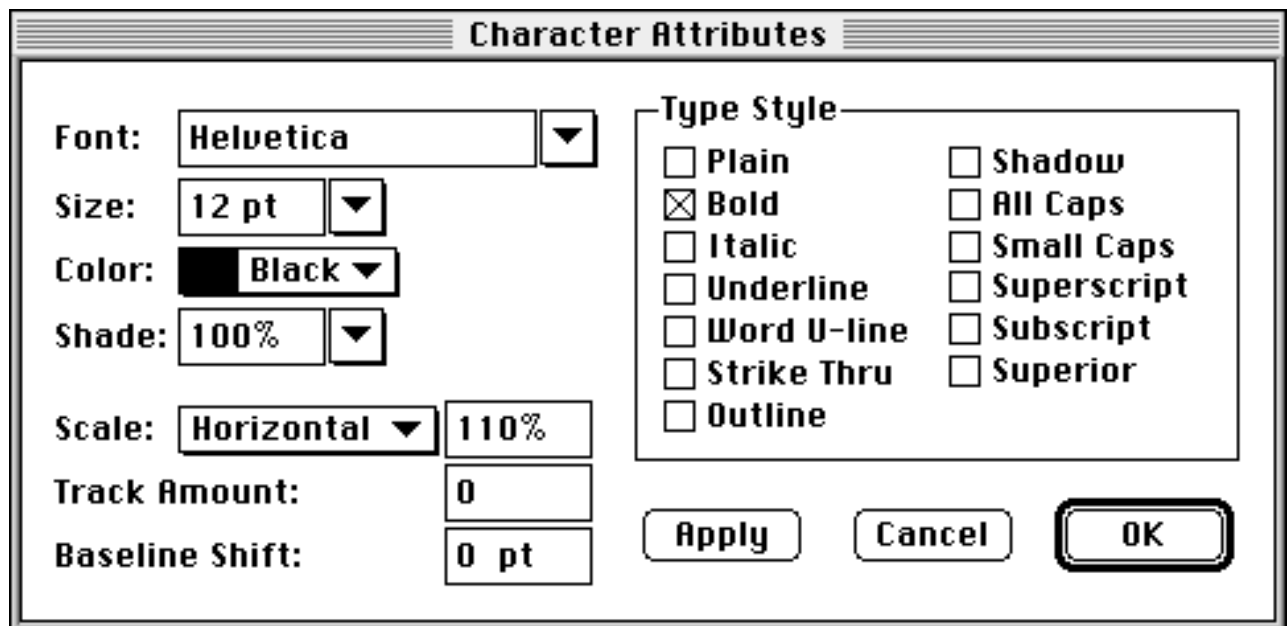
Use the **Drop Caps** feature to specify how many characters should drop and how far into the paragraph they should descend.

- 5** **Locally format the letter “C:”** Highlight the letter “C” and choose **Style → Character**. Choose **Helvetica/Arial** from the **Font** menu. Enter 12 in the **Size** field.

Choose **Horizontal** from the **Scale** menu and enter 110 in the field.

Check **Bold** in the **Type Style** area.

Click **OK**.



Use the **Character Attributes** dialog box when you want to apply multiple styles.

 **Formatting initial caps:** To embellish automatic drop caps, highlight the initial caps and apply options from the **Style** menu as usual. You can reposition automatic drop caps vertically using baseline shift, and horizontally using kerning. To raise initial caps, apply styles to make the caps bigger and taller. You can use the full range of styles including fonts, sizes, type styles, and colors. If you’re using any initial cap styling repetitively, create a character style sheet so all the attributes are easy to apply.

 **Using anchored boxes as initial caps:** You can anchor a text or picture box to create an initial cap. For example, an anchored text box might include embellished text and a background color or an anchored picture box might contain a picture of an ornate letter or a graphic.

 **Hanging drop caps:** To hang dropped characters to the left of a paragraph, enter the Indent Here character. On Mac OS press $\mathbb{A}+\backslash$ and on Windows press **CTRL+ $\backslash$** after the last drop cap.

Anchoring Items in Text

QuarkXPress lets you paste boxes and lines of any shape in text, which makes them act like characters and flow with text. In this task you'll anchor circular text boxes.



Keyboard Commands for Mac OS:

Show/Hide Guides	.F7
Show/Hide Invisibles	.⌘+I
Copy	.⌘+C
Cut	.⌘+X
Paste	.⌘+V
Hanging Indent	.⌘+\



Keyboard Commands for Windows:

Show/Hide Guides	.F7
Show/Hide Invisibles	.CTRL+I
Copy	.CTRL+C
Cut	.CTRL+X
Paste	.CTRL+V
Hanging Indent	.CTRL+\

1 | **Scroll down to the screenshot of the Measurements palette:** Use the scroll arrows on the document window to scroll down to the screenshot of the **Measurements** palette in the lower left corner of the page.

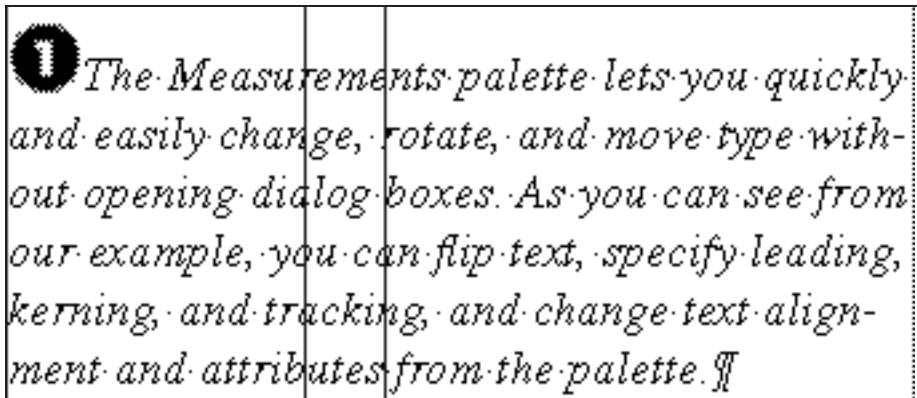
2 | **Show the document's guides and invisible characters:** Choose **View → Show Guides**, then choose **View → Show Invisibles**.

3 | **Copy the circular numeral "1:"** Using the Item tool , select the circular numeral positioned to the left of the palette screen shot, and choose **Edit → Copy**. The box is copied to the Clipboard.

4 | **Anchor the box into the corresponding text above:** Scroll up to the italicized paragraph that starts with the words "The Measurements palette."

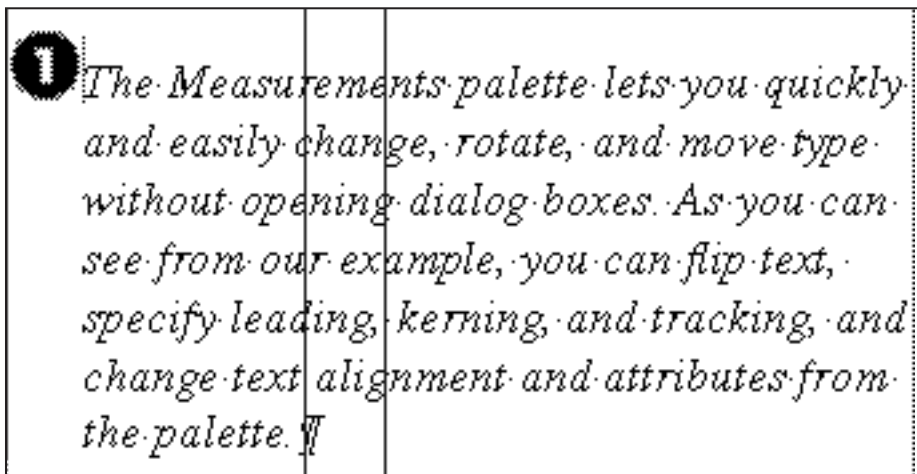
Select the Content tool , then place the Text Insertion bar  immediately before the italicized word "The."

Choose **Edit** → **Paste** to anchor the box in the text.



Anchor the text box by pasting it with the Content tool .

- 5** Hang the text vertically so it aligns under the “T” in “The:” Enter an Indent Here character after the number: On Mac OS press ⌘+\\ (backslash) and on Windows press CTRL+\\.



Align the text under the “T.”

- 6** Hide the document’s guides and the invisible characters: Choose View → Hide Guides; then choose View → Hide Invisibles.

 **Anchoring Text to Box boxes:** Using the Text to Box command, you can create a text-shaped Bézier picture box from highlighted text. To anchor the box into a paragraph, press Option/ALT while choosing **Style** → **Text to Box**. (Do this before the text is converted.)

Specifying Rules

Lines, or rules, are frequently used above or below paragraphs to separate information or add visual interest. The **Rules** feature automatically places lines above or below paragraphs, and the rules flow with the text. The **Dashes & Stripes** feature in QuarkXPress lets you customize the pattern of the rule. In this task you'll create custom, list-dividing rules.



Keyboard Commands for Mac OS:

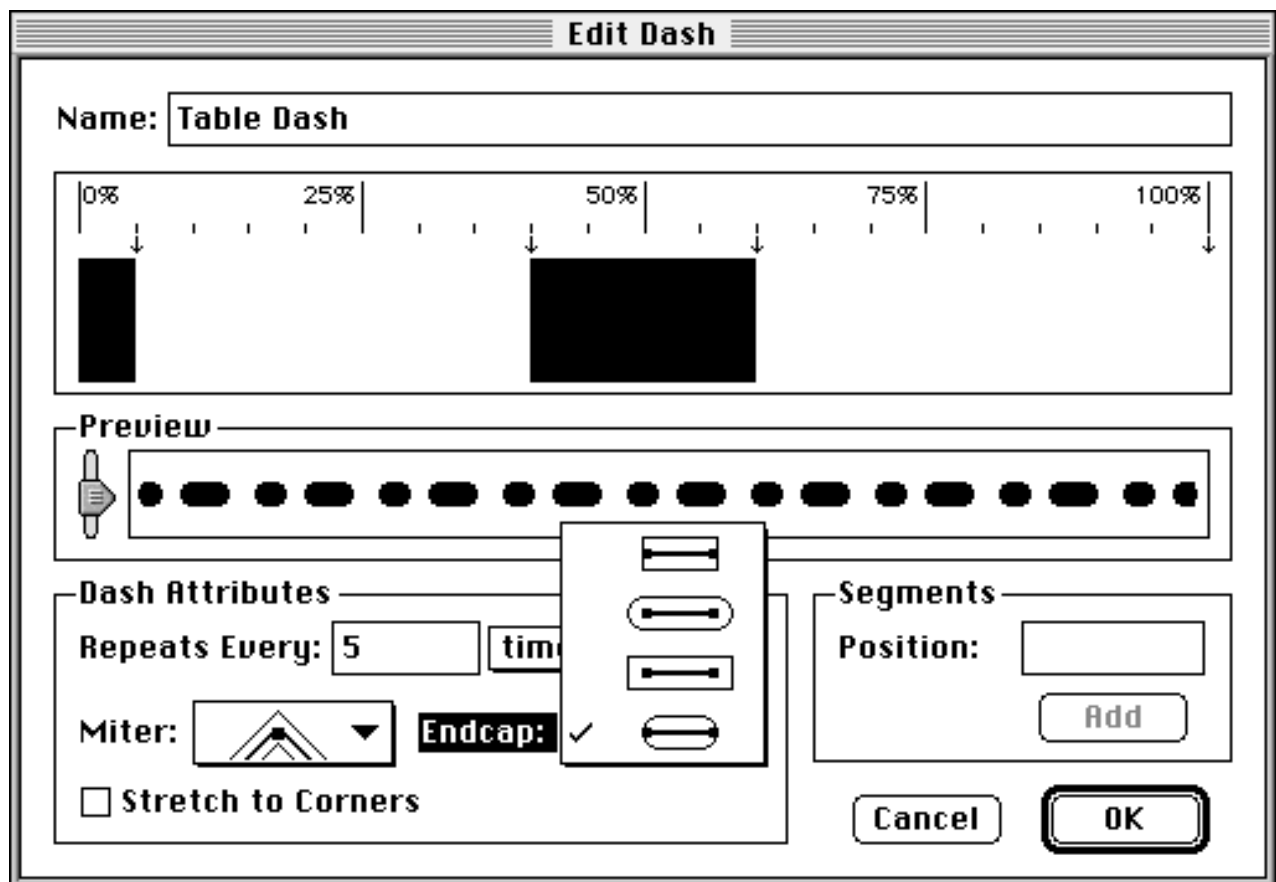
Rules⌘+⇧+N



Keyboard Commands for Windows:

Rules CTRL+SHIFT+N

- 1 Create a custom dash pattern for your rule: Choose **Edit → Dashes → Stripes**. Click the **New** button until a menu displays and choose **Dash**. Enter **Table Dash** in the **Name** field.



The **Edit Dash** dialog box lets you create a custom pattern for lines and rules.

Locate the **Segments** area in the lower right corner of the dialog box. Enter 10 in the **Position** field and click **Add**.

Highlight the value in the **Position** field and enter 40, then click **Add**.

Highlight the value in the **Position** field again and enter 60, then click **Add**.

Select the last option from the **Endcap** menu.

Click **OK**, then click **Save**.

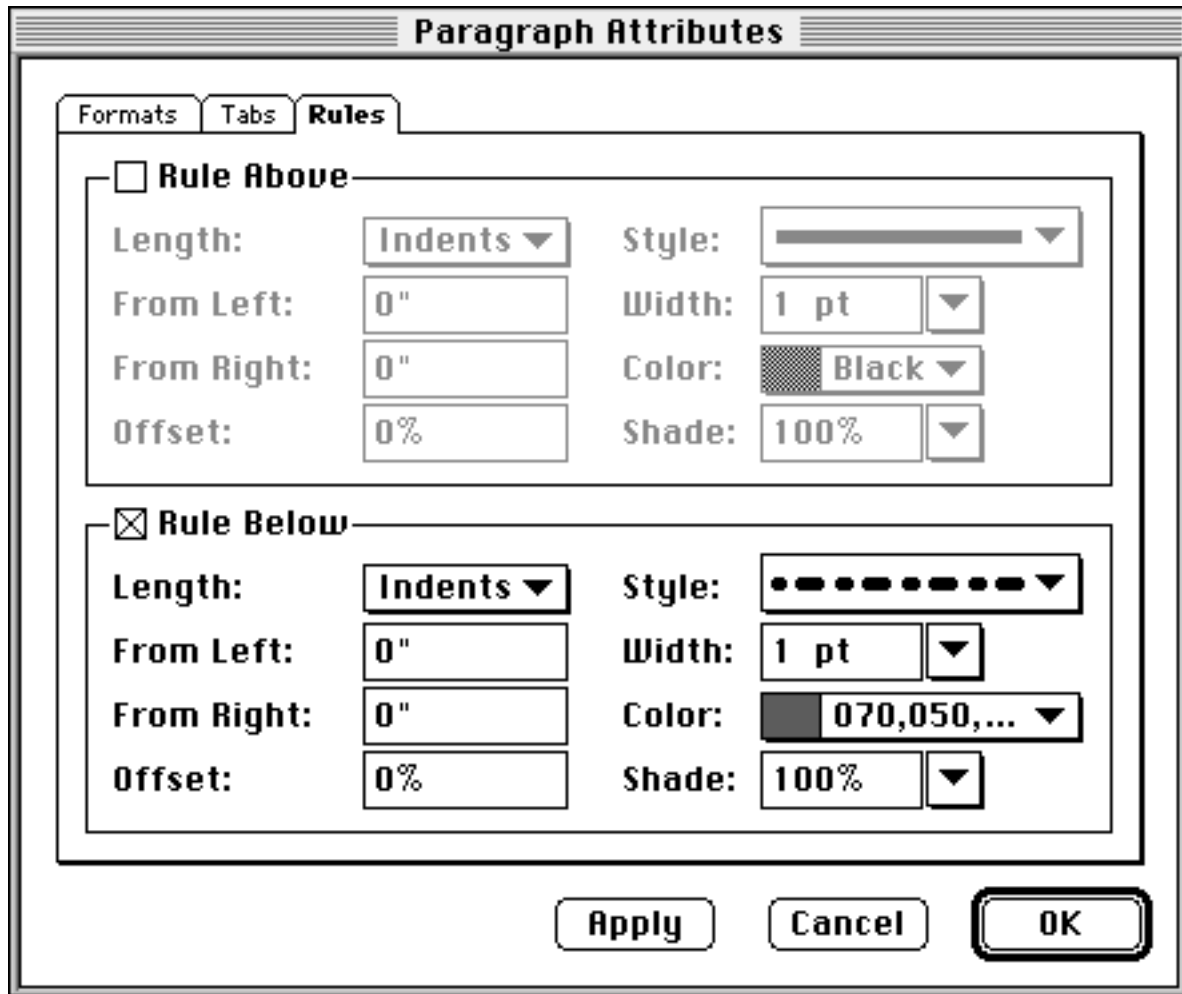
2 | Select the paragraphs you want to divide with rules: Zoom in on the _____ text box on the bottom of the right-hand page. Using the Content tool , highlight all the paragraphs.

Keyboard Commands	Mac OS		Windows	
Horizontal/Vertical scale	(condense) Cmd+[	(expand) Cmd+]	(condense) CTRL+[	(expand) CTRL+]
Baseline shift	(down) Cmd+Opt+Shift+-	(up) Cmd+Opt+Shift++	(down) CTRL+ALT+SHIFT+)	(up) CTRL+ALT+SHIFT+(
Tracking/kerling	(decrease) Cmd+Shift+{	(increase) Cmd+Shift+}	(decrease) CTRL+SHIFT+{	(increase) CTRL+SHIFT+}
Changing font size	(decrease) Cmd+Shift+>	(increase) Cmd+Shift+<	(decrease) CTRL+SHIFT+>	(increase) CTRL+SHIFT+<
Interactive text resizing	Cmd+ resize text box		CTRL+resize text box	

Visually separating elements in this list will help lead the reader's eyes.

3 | Create a rule below the highlighted paragraphs: Choose **Style → Rules** and check **Rule Below**. Choose your new **Table Dash** style from the **Style** menu. Choose **070,050,000,015** from the **Color** menu.

Make sure the other options are set at their defaults: **Length:** Indents; **From Left/From Right:** 0; **Offset:** 0%; **Width:** 1 pt; **Shade:** 100%. Click OK.



Create rules above and below paragraphs with specifications in the **Rules** tab.

The table, with divider rules, will look something like this:

Keyboard Commands	Mac OS	Windows
Horizontal/vertical scale.....	(condense) Cmd+[..... (expand) Cmd+]	(condense) CTRL+[..... (expand) CTRL+]
Baseline shift.....	(down) Cmd+Opt+Shift+ (up) Cmd+Opt+Shift++	(down) CTRL+ALT+SHIFT+ (up) CTRL+ALT+SHIFT++
Tracking/kerning.....	(decrease) Cmd+Shift+{ (increase) Cmd+Shift+}	(decrease) CTRL+SHIFT+{ (increase) CTRL+SHIFT+}
Changing font size.....	(decrease) Cmd+Shift+> (increase) Cmd+Shift+<	(decrease) CTRL+SHIFT+> (increase) CTRL+SHIFT+<
Interactive text resizing.....	Cmd+ resize text box	CTRL+resize text box

Rules are commonly used to separate text in tables.

Creating Text-Shaped Boxes

You can convert a character or group of characters to a Bézier picture box shaped like your text. Then use the box any way you want: import a picture, apply a blend or frame, or convert it to a text box. In this task you'll convert a range of text to a picture box and import a picture.



Keyboard Commands for Mac OS:

Delete⌘+K
Get Picture⌘+E



Keyboard Commands for Windows:

Delete CTRL+K
Get Picture CTRL+E

1 **Convert the words “text to box” to a picture box:** Locate the words “text to box” on the right-hand page. Using the Content tool , select the box and triple-click to highlight all the text.

Choose **Style** → **Text to Box**.

Select the original text box and choose **Item** → **Delete**.

Using the Item tool , select the new picture box and drag it back up near the “9” bullet.



The **Text to Box** feature copies the text, then converts it to a picture box.

- 2** Import a graphic into the new picture box: Click the text-shaped box and choose **File → Get Picture**. Open the “Module 2” folder, then open the “Lesson 5” folder. Select the “Sunset.tif” picture and click **Open**.



You can manipulate a text-shaped picture box and its picture just as you can with any other picture box.

- 3** Split the text-shaped box into individual characters: Choose **Item → Split → Outside Paths** to break the words into individual letter-shaped boxes. A copy of the picture is now in each box.

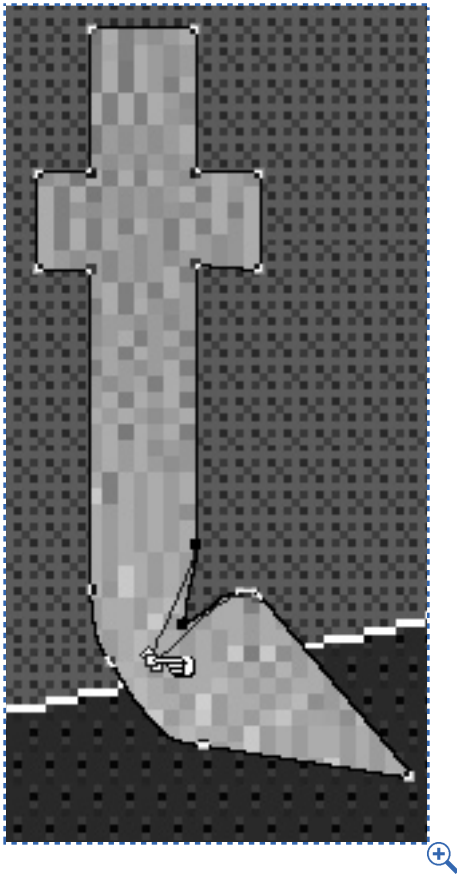
Select individual boxes and drag them around.



The **Split** command lets you convert multiple-contoured boxes into separate boxes.

- 4** **Edit the Bézier curves on one of the characters:** Select the letter “t” and choose **Item** → **Edit** → **Shape** to display the Bézier points.

Click on a point and drag it to reshape and resize the character as you wish. When you’re finished experimenting with the shape, choose **Item** → **Edit** → **Shape** again to hide the points.



You can manipulate the Bézier curves that make up character-shaped boxes just as you manipulate any other Bézier item.

 **Font size and attributes:** Text to Box conversion looks best with larger display type, like 36 pt and larger, but it works with smaller text too. The Bézier outlines resulting from **Text to Box** will include bold or italic type styles applied to the text, but other type styles such as shadow or underline will be ignored.

 **Font types:** The **Text to Box** command can convert Type 1 fonts with Adobe Type Manager (ATM) installed and TrueType fonts into a Bézier picture box, but it cannot convert bitmap fonts.

Creating Text Paths

Creating text paths combines several fundamental QuarkXPress skills: drawing lines, entering text, formatting text, and modifying items. In this task you'll create a freehand Bézier path that contains text, then style it to fit the design.



Keyboard Commands for Mac OS:

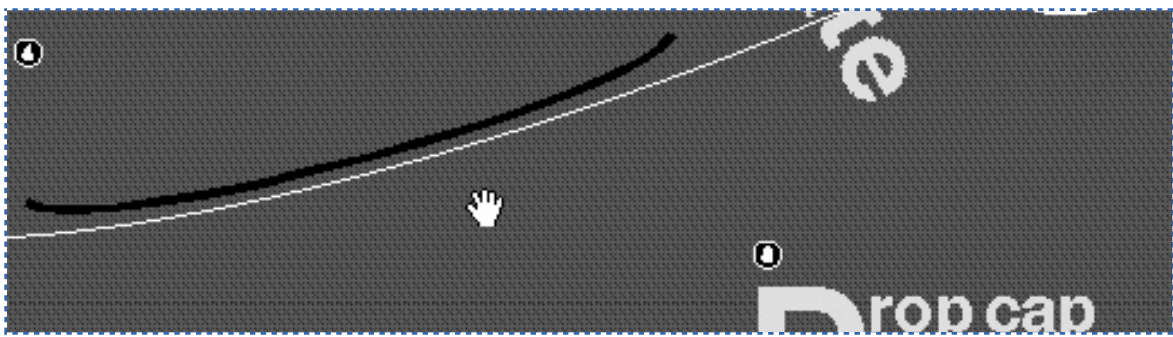
Select All	⌘+A
Character Attributes	⌘+⇧+D
Modify	⌘+M
Delete	⌘+K
Undo	⌘+Z
Fit in Window	⌘+0 (zero)
Close	⌘+W



Keyboard Commands for Windows:

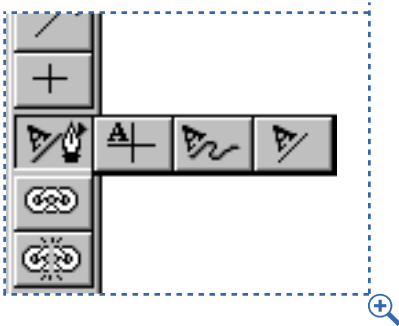
Select All	.CTRL+A
Character Attributes	.CTRL+SHIFT+D
Modify	.CTRL+M
Delete	.CTRL+K
Undo	.CTRL+Z
Fit in Window	.CTRL+0 (zero)
Close	.CTRL+F4

1 View the thick black line above the words “horizontal scale:” Press Option/ALT to access the Page Grabber hand , then move the page until the black line is in view.



Drag the page down until the thick black line is in view.

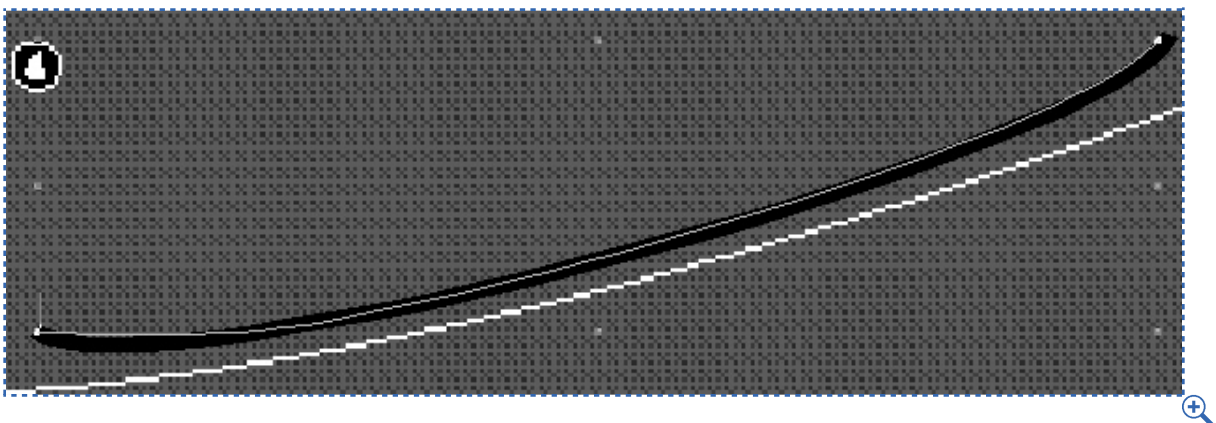
- 2** Use the **Freehand Text-Path tool** to trace the line: Click the current text-path tool and pause to access the pop-out tools; then drag and select the Freehand Text-Path tool .



Use the **Freehand Text-Path** tool  to create flowing text paths.

Starting at one end of the line, click and drag to trace the line as close as you can. Don't worry about making it perfect.

If you're not happy with your text path, choose **Item** → **Delete**, then draw a new path.



The new path appears light gray. If the path is selected with the Content tool , the Text Insertion point  flashes at the beginning of the path.

3 Enter and format some text: Using the Content tool , enter the words text path. Choose **Edit** → **Select All**, then choose **Style** → **Character**. Choose **Helvetica/Arial** from the **Font** menu.

Enter 50 in the **Size** field.

Choose **000,010,100,000** from the **Color** menu.

Choose **Vertical** from the **Scale** menu and enter 160 in the field.

Enter 20 in the **Track Amount** field.

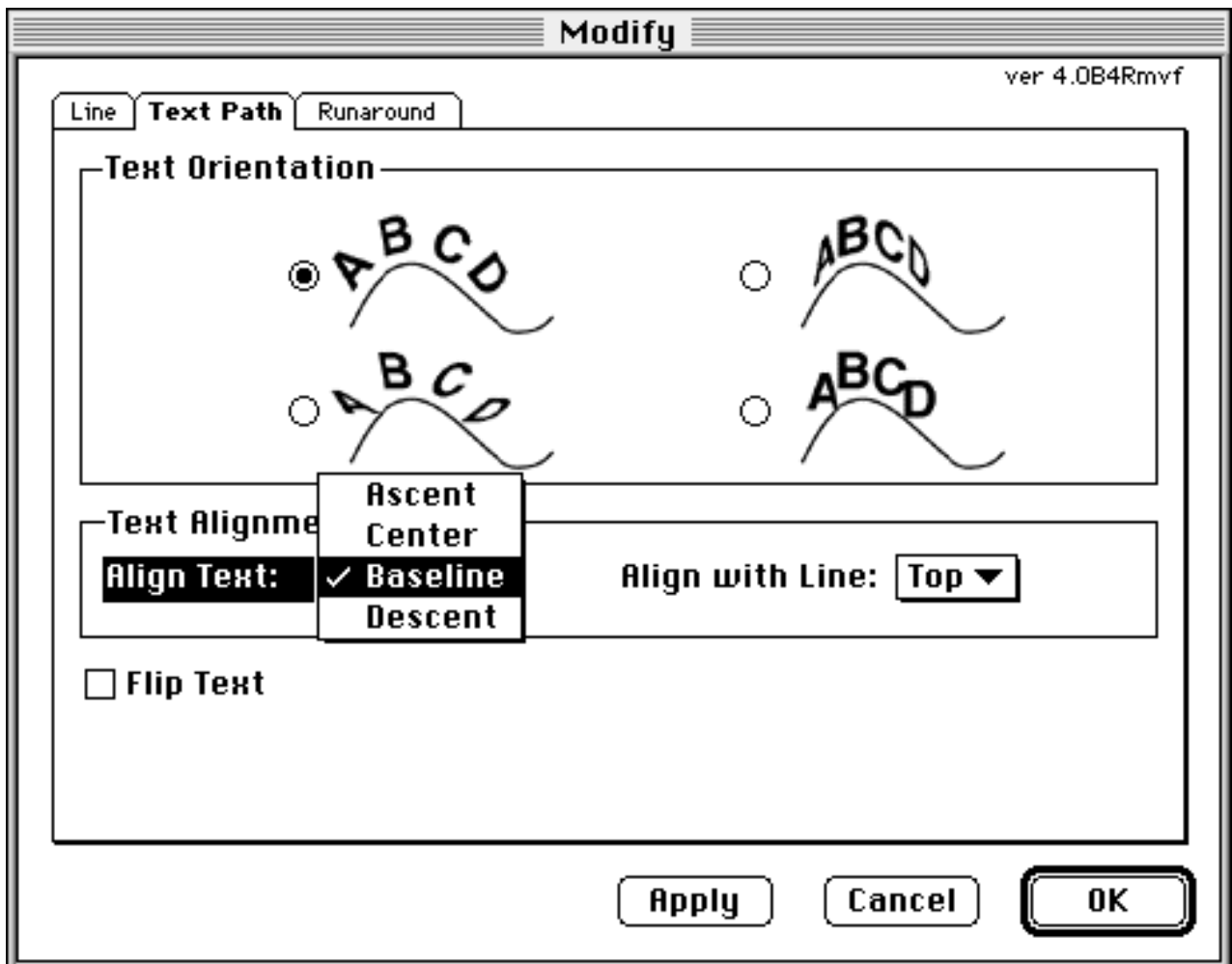
Check **Bold** in the **Type Style** area.

Click **OK**.



The formatted text blends in well with the other layout elements.

- 4** Realign the text so it sits flush on the path: Choose **Item** → **Modify**, then click the **Text Path** tab. Choose **Baseline** from the **Align Text** menu. Click **OK**.



The **Align Text** menu lets you control how the text sits on the path.

5 **Delete the black tracing line and view the entire document:** Using the Item tool , click to select the black line and choose **Item → Delete**. If you accidentally delete the wrong item, choose **Edit → Undo**.

!!! If your text path is obscuring the tracing line, use this technique to select hidden items: Press $\text{⌘} + \text{Option} + \text{Shift}$ / $\text{CTRL} + \text{ALT} + \text{SHIFT}$ and click to select “through” a stack of items.

Choose **View → Fit in Window**.

6 **Close and save the document:** Choose **File → Close**. If you haven’t recently saved your document, a dialog box asks you to save it. Click **Yes**.

 **Setting text-path tool preferences:** Double-click a text-path tool in the Tool palette to display **Tool Preferences**. You can set preferences for the style, arrowheads, width, color, shade, orientation, alignment, and runaround attributes of new text paths.

 **Text path line styles:** Although text paths can have any line style, you can create interesting effects by placing text on paths without color. “Invisible” paths are the default, and they make text look like it’s floating in space. You can also use custom dashes and stripes, default line styles, colors, etc. to create interesting text paths.

Checkpoint

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Create a drop cap
- Anchor items
- Add rules above and below paragraphs
- Convert text to boxes
- Create text paths

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Make a whole word drop as many lines as space permits.
- Anchor items in text: try a line and a picture box.
- Place thin rules above and below paragraphs. Play with options in the **Length** menu and various **Offset** values.
- Using boxes created with the **Text to Box** (**Style** menu) command, experiment with the **Split** and **Merge** commands (**Item** menu).
- Experiment with the **Text Orientation** and **Text Alignment** options in the **Text Path** tab of the **Modify** dialog box (**Item** menu).



The lesson files are all templates, which means you can open copies of them without affecting the original files.

Anchored Items

You can anchor boxes and lines of any shape in text. When you anchor items, they flow with the copy whenever you edit surrounding text. You can raise or lower anchored items, or you can unanchor them.

Choosing the alignment and position for anchored items

You can control the alignment and baseline position of an anchored item in surrounding text using:

- **Item** menu: Choose **Item** → **Modify**. In the **Align with Text** area, click **Ascent** for “dropping” alignment or **Baseline** for the opposite. To raise or lower the item more, enter a value in the **Offset** field, then click **OK**.

P as in  Pear P as in  Pear

Align anchored items with either the ascent (left) or the baseline (right) of a text line.

- **Measurements** palette: If you’ve anchored a box, click  to align the anchored item with the ascent of the text line. Click  to align the box with the baseline. (You must still use the **Modify** dialog box if you want to enter a numerical offset.)



Click  or  to quickly align anchored boxes with either the ascent or baseline.

Unanchoring items

To unanchor an item, select it with the Item tool  and choose **Item** → **Duplicate** to create an unanchored copy of the item. Delete the anchored item from the text by highlighting it with the Content tool  and pressing **Delete**, or by placing the Text Insertion bar  after the item and backspacing over it.



If you paste an item when the Item tool  is selected, the item will not be anchored to text; it will just be pasted normally on the page.



Anchored items and auto leading: In paragraphs with auto leading, lines of text are spaced according to the largest character on each line. An anchored item that is larger than the characters in a line may cause inconsistent line spacing in the paragraph.

Rules

Rules are horizontal lines automatically placed above and/or below paragraphs. You can specify the length, indentation, style, and placement of rules, and you can save rule specifications with paragraph style sheets.

Specifying rules for paragraphs

To apply a rule above and/or below selected paragraphs:

- 1 Choose **Style** → **Rules**.
- 2 Check **Rule Above** and/or **Rule Below**. Use the controls in each section to customize the rule.
- 3 Choose an option from the **Length** menu to specify the initial length of the rule:
 - **Indents** specifies a rule that extends from the paragraph's **Left Indent** to its **Right Indent** (specified in the **Formats** tab).
 - **Text** specifies a rule as long as the first line of text (rule above) or the last line of text (rule below).
- 4 Enter values in the **From Left** and **From Right** fields to indent the rule further (subtracting from the **Length**).
- 5 Enter a value in the **Offset** field to specify the amount of space between a rule and text. You can enter an absolute value (.xx") or a percentage (x%) value.
 - For a **Rule Above**, an absolute **Offset** value places space between the bottom of the rule and the baseline of the first line of the paragraph. A percentage **Offset** value is measured up from the top of the ascenders in the paragraph's first line of text, to the bottom of the rule.
 - For a **Rule Below**, an absolute **Offset** value places space between the top of the rule and the baseline of the last line of the paragraph. A percentage **Offset** value is measured down from the bottom of the descenders in the paragraph's last line of text, to the top of the rule.

- 6** Choose a line style from the **Style** menu and enter a value in the **Width** field.
- 7** Choose an option from the **Color** menu and enter a value in the **Shade** field.
- 8** Click **Apply** to preview the rules, then click **OK**.

Removing rules from paragraphs

To remove a rule from selected paragraphs, choose **Style** → **Rules**. Uncheck **Rule Above** and/or **Rule Below**, then click **OK**.

 Text Paths

The text-path tools let you create paths that spiral, circle, stair-step, or slant. Once you've created a path you can add and format text any way you like.

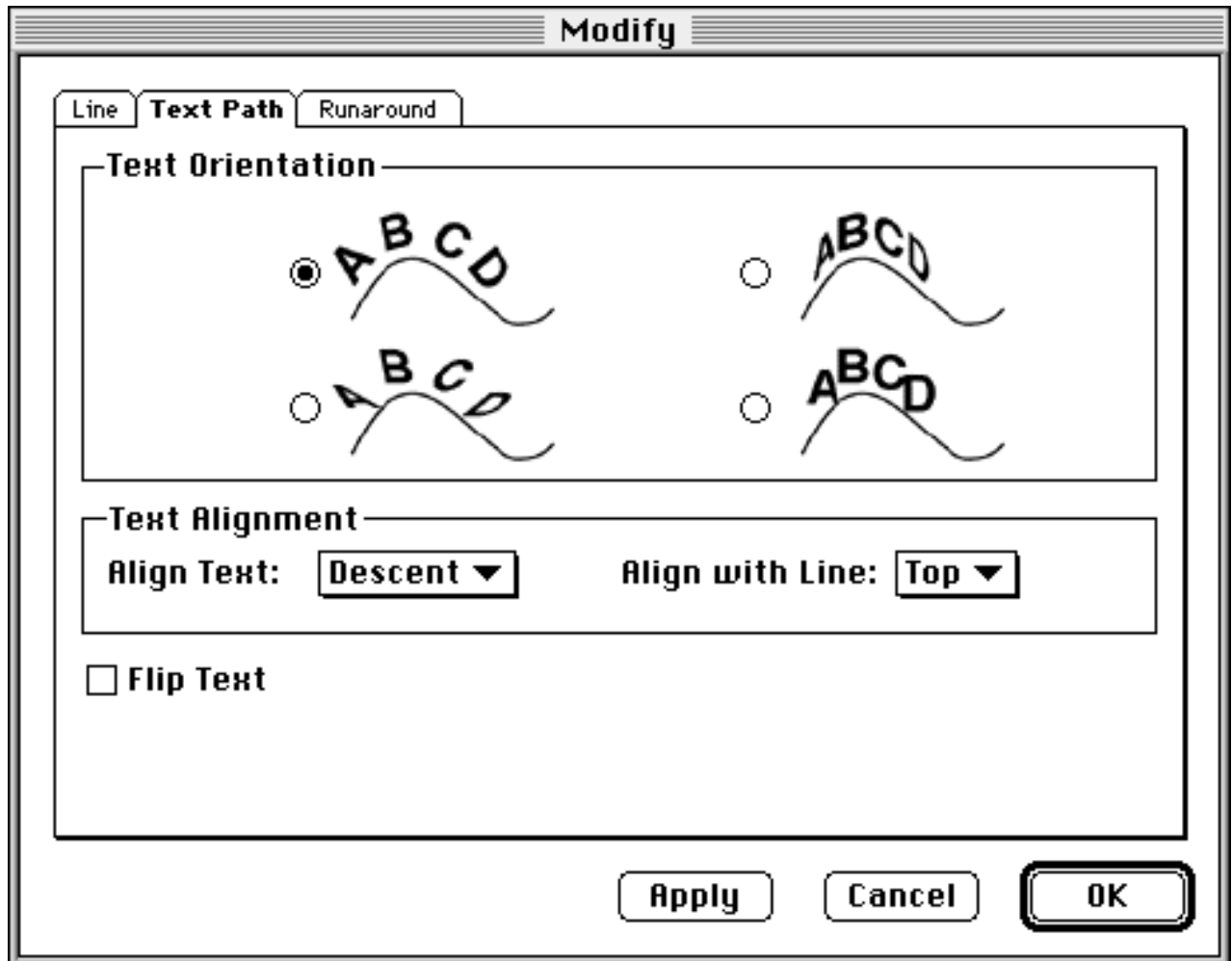
Creating text paths

You can create several types of text paths using the following tools:

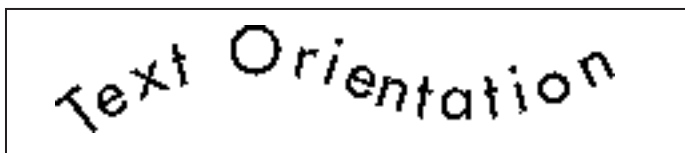
- The Line Text-Path tool  creates straight text paths at any angle.
- The Orthogonal Text-Path tool  creates straight horizontal or vertical text paths.
- The Bézier Text-Path tool  creates text paths with curved and straight line segments.
- The Freehand Text-Path tool  creates freehand text paths with curved line segments.
- Any text box tool (for example, the Oval Text Box tool ) can be used to create a text path. Just remember that after you draw the box, you must change it into a path by choosing **Item** → **Shape** → .

Controlling text orientation

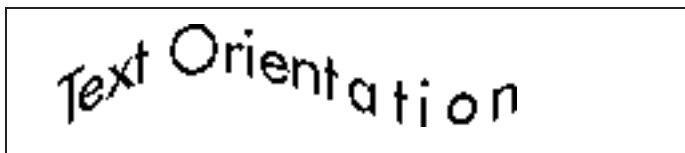
You can control the way text rides the path using options in the **Text Path** tab.



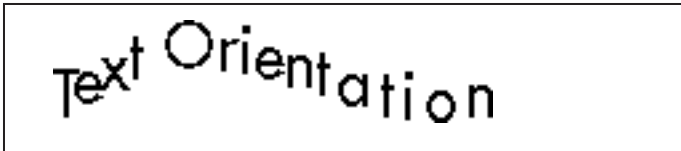
The **Text Orientation** area lets you control the way text rides a path.



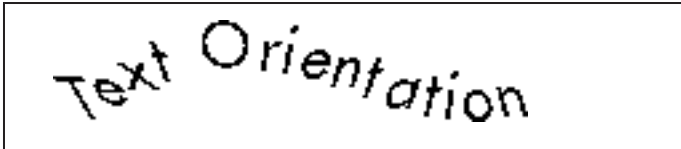
The upper-left button is the default. Characters are rotated, but not skewed, to sit at the angle determined by the path.



The upper-right button produces a 3-D effect. Characters are rotated and skewed, and sometimes flipped, to produce the effect.



The lower-right button produces a stair-step appearance. Characters are neither rotated nor skewed.



The lower-left button produces a warped appearance. Characters are skewed but not rotated.

Controlling text position

Choose an option from the **Align Text** menu to determine which part of a font is used to position characters on the path. (The following examples of font orientation are positioned on **Top** of the path as determined by the **Align with Line** menu. See the next page for more information about **Align with Line**.)



Choose **Ascender** to place a font's ascenders on the path.



Choose **Center** to intersect the path with the center of the font's x-height.



Choose **Baseline** to place a font's baseline on the path.

The image shows the text 'ABC f x g' in a bold, sans-serif font. The letters 'f' and 'g' have descenders that go below the baseline of the text. The text is positioned on a thick, light gray horizontal path. The descenders of 'f' and 'g' extend below the path.

Choose **Descent** to place a font's descenders on the path.

Controlling path orientation

Choose an option from the **Align with Line** menu to determine path orientation. Depending on the line width of the path, **Top**, **Center**, and **Bottom** path orientation may make quite a visual difference.

The image shows the text 'ABC' in a bold, sans-serif font. The text is positioned on a thick, light gray horizontal path. The text is aligned to the top of the path, meaning the bottom of the letters sits on the path.

Choose **Top** to position the font on top of the path.

The image shows the text 'ABC' in a bold, sans-serif font. The text is positioned on a thick, light gray horizontal path. The text is centered on the path, meaning the middle of the letters sits on the path.

Choose **Center** to position the font in the middle of the path.

The image shows the text 'ABC' in a bold, sans-serif font. The text is positioned on a thick, light gray horizontal path. The text is aligned to the bottom of the path, meaning the top of the letters sits on the path.

Choose **Bottom** to position the font on the bottom of the path (right).



Constraining text paths to 0°, 45°, or 90° angles: To constrain a text path created with the Line Text-Path tool  to 0°, 45°, or 90° angles, press Shift while you draw or resize the text path.



Flipping text paths: You can flip text paths horizontally by choosing **Style → Flip Text**, by checking **Flip Text** in the **Text Path** tab, or by clicking  in the **Measurements** palette. The **Flip Text** command does not produce a true flip, but instead places the text on the opposite side of the path, upside down. This is especially useful for circular text paths.



Measurements palette text-path controls: When you select a text path with the Content tool , the **Measurements** palette displays text information; when you select a text path with the Item tool , the **Measurements** palette displays line information.

6

Modifying Pictures

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6

Modifying Pictures

What's Ahead

What's a poster without a graphic? A photo album without snapshots? It could never happen! Art is an integral part of everyday items — and of a document's design. Photographs, paintings, line art, and graphics add life to pages and convey information that words alone cannot. QuarkXPress accommodates artists by offering many ways to manipulate and control images.

In this lesson you'll manipulate contrast, create a clipping path, and experiment with text runaround. To see the finished document, open "Pictures Final.qxt" in the "Lesson 6" folder inside the "Module 2" folder.

Modifying Contrast

Contrast describes tone reproduction — the relationship between highlights, middle tones, and shadows in a picture. QuarkXPress offers controls that let you modify the contrast of bitmap pictures.



Keyboard Commands for Mac OS:

Open⌘+O
 Save as⌘+⇧+S
 Contrast⌘+⇧+C



Keyboard Commands for Windows:

Open CTRL+O
 Save as CTRL+ALT+S
 Contrast CTRL+SHIFT+C

1 | **Open the “Pictures.qxt” template:** Choose **File → Open**. Open the “Module 2” folder, then open the “Lesson 6” folder. Select “Pictures.qxt” and click **Open**. A new document based on the template displays.

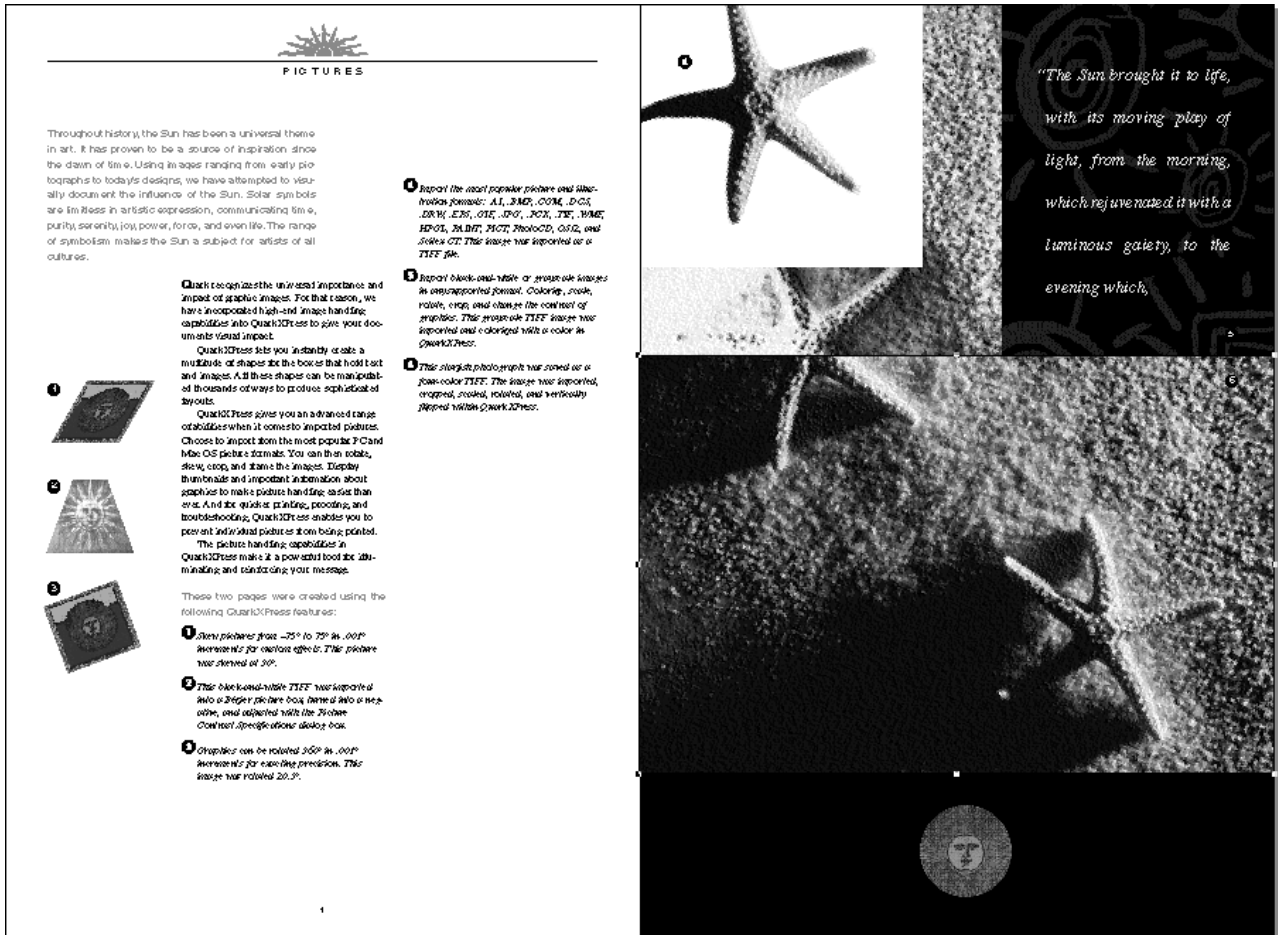


If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

2 | **Save the document in the Student Files folder:** Choose **File → Save as**. Open the Student Files folder and enter a descriptive name like “My Pictures.qxd.” (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

- 3** Select the box containing the blue (negative contrast) starfish: Using the Item tool  or Content tool , click to select the box containing the blue starfish.



You'll modify the contrast of this color picture.

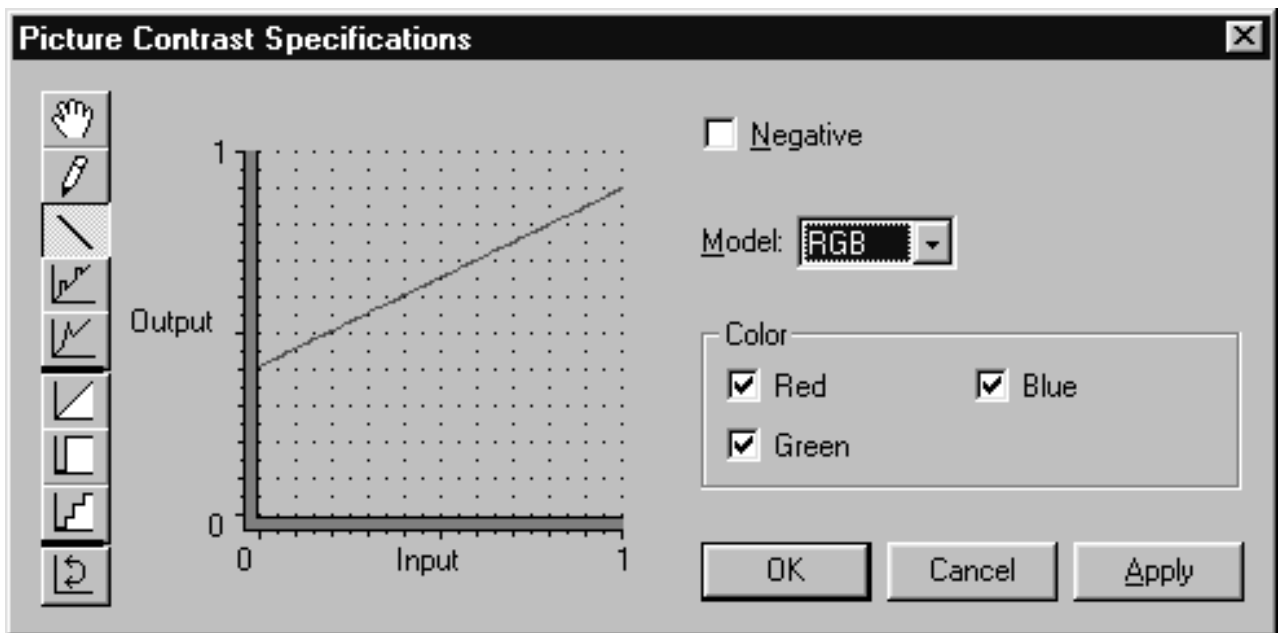
- 4** Open the Picture Contrast Specifications dialog box: Choose **Style** → **Contrast**. If necessary, move the dialog box so you can see the starfish picture. Press Option/ALT while clicking **Apply**. This puts the dialog box in "continuous apply" mode, which means that any changes you make will immediately affect the picture. Uncheck **Negative**.
- 5** Set up the dialog box to work with the RGB color model: Choose **RGB** from the **Model** menu. Because you will work with all three color channels simultaneously, the **Color** area's **Red**, **Green**, and **Blue** check boxes should remain checked.
- 6** Create a high contrast for the image: Click the High Contrast tool . This removes the gradation of tones from your image. In fact, the contrast is limited to an "on or off" status with no intermediate tonal gradation.

7 Draw your own contrast curve for the image: The top five icons at the left of the dialog box represent tools that allow you to create your own custom contrast curve.

In this case, you'll replicate the kind of "color ghosting" effect you get when a piece of translucent white tissue paper overlays a picture (reduced contrast, increased brightness). Because this is a simple "linear" transformation, you're going to use the Line tool \.

Click the Line tool \ and draw a line that extends from 40% to 90% as shown below. (Notice that the graph has tick marks at 5% intervals, but don't worry about the exact position.)

Click OK.



This graph shows a custom RGB contrast curve extending from 40% to 90%.

Contrast and the original picture file: Contrast modifications affect only the way QuarkXPress displays and prints an imported picture; the original file is unaffected.

File formats that allow contrast modifications: JPEGs (color and grayscale), OS/2 color bitmaps, PhotoCD images, bitmap PICTs (color and grayscale), Scitex CTs (color and grayscale), TIFFs (color and grayscale), and Windows bitmap images (color and grayscale) all allow contrast modifications. You can also apply a **Negative** style to 1-bit TIFFs and Windows BMP/PCX images.



Contrast curves: Contrast controls let you create special effects or apply color correction to an image. A contrast “curve” represents the relationship between the contrast of the original picture file (called the “input”) and the version modified using the controls in the **Picture Contrast Specifications** dialog box (called the “output”). When the input and output are identical (when no edits have been made), the curve looks like a straight 45-degree line  ascending left-to-right. Any other “curve” represents an alteration to the “intensity” of a given visual aspect or set of aspects. For example, if you choose to edit all four CMYK curves collectively, and your curve looks like a 45-degree ascending line *except* for a slight dip in the middle of the line, you have effectively reduced the ink density of your image’s middletones. The visual result of a contrast curve depends largely on the type of **Model** you choose in the dialog box, so unfortunately a complete description of what to expect is impractical. Two of the models are *subtractive* (CMY and CMYK), one of them is *additive* (RGB), and one is neither (HSB). However, the **Apply** button will give you a rough idea of what’s happening as you work. You should also be aware that final edits are stored only in the QuarkXPress document (not in the picture file itself), so you can change your mind and go back to the original contrast at any time: Just press the Normal Contrast tool .

Creating Clipping Paths

Clipping paths tell QuarkXPress which parts of a picture should display and print, and which parts should be transparent. You can use clipping paths when you want to isolate a picture's subject from its background. QuarkXPress can create clipping paths from scratch or it can use embedded path and alpha channel information to create clipping paths. In this task you'll create a clipping path from scratch.



Keyboard Commands for Mac OS:

Actual Size	.⌘+1
Clipping	.⌘+⌘+T
Edit Clipping Path	.⌘+⇧+F4



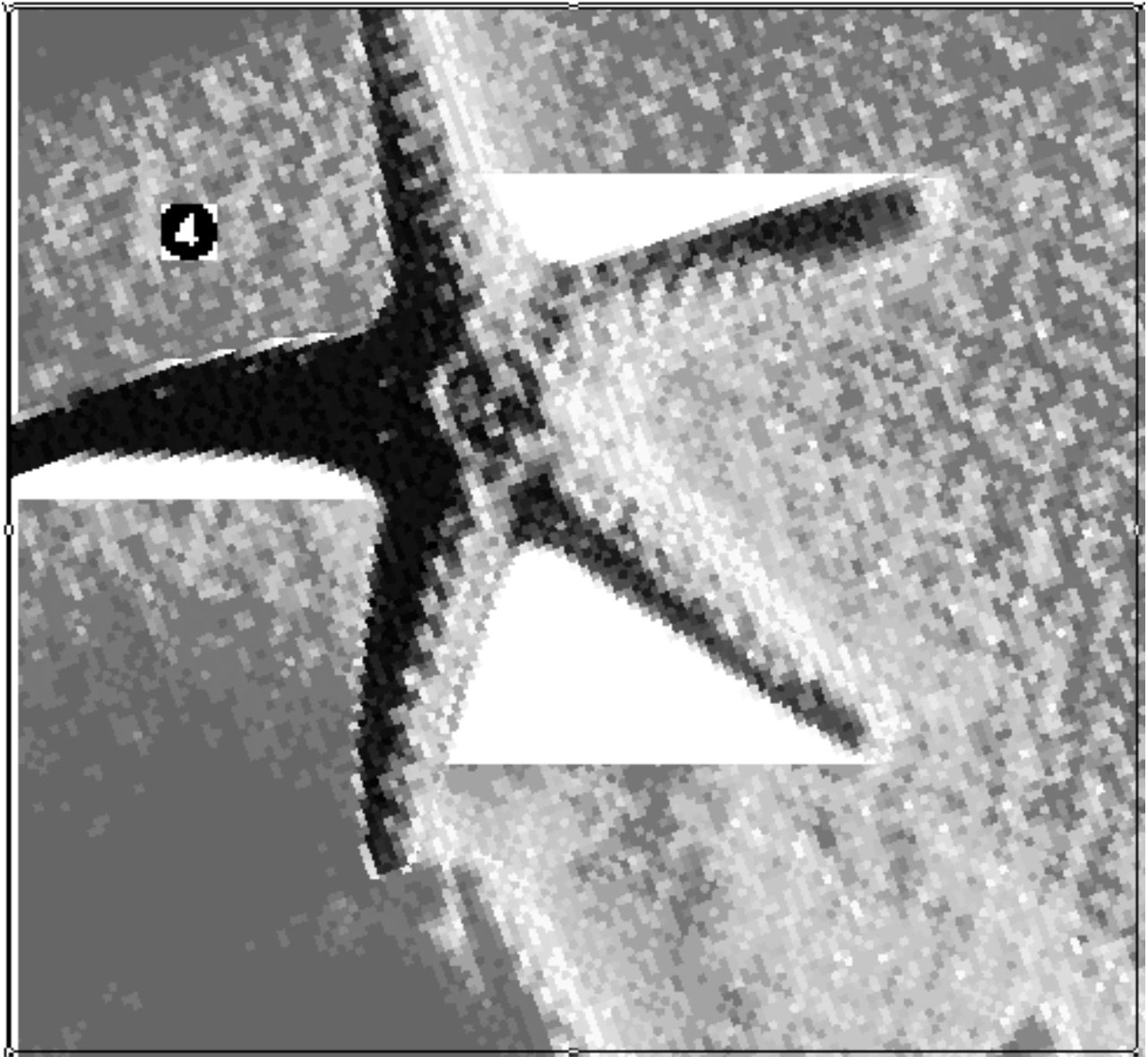
Keyboard Commands for Windows:

Actual Size	.CTRL+1
Clipping	.CTRL+ALT+T
Edit Clipping Path	.ALT+SHIFT+F4

- 1 Zoom in on the starfish with the white background:** Drag a Zoom tool  marquee around the picture of the starfish with the white background on the top of page 2. Using the Item tool , select the picture.

- 2** Specify a background of **None**: Choose **Item** → **Modify**. In the **Box** tab and **Box** area, choose **None** from the **Color** menu. Click **OK**.

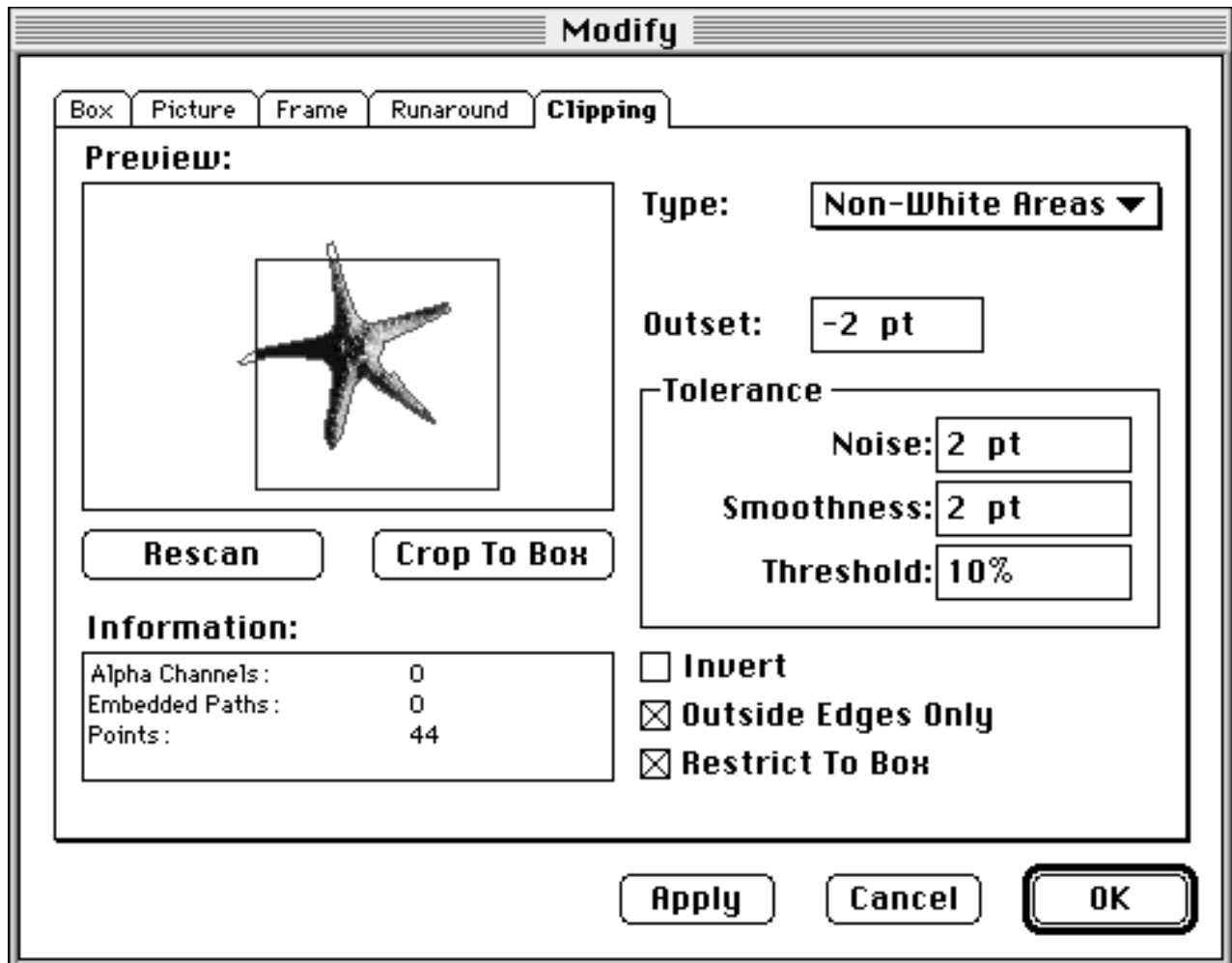
Notice that the picture's white box background has become transparent, but some white areas remain. A clipping path is needed to hide the white background pixels that are still visible.



You've changed the box background of this starfish from **White** to **None**, but you still need a clipping path to avoid this "jaggy TIFF" problem.

- 3** Create a clipping path: Choose **Item** → **Clipping**. Choose **Non-White Areas** from the **Type** menu.

Non-White Areas creates a QuarkXPress clipping path based on the picture's subject. The clipping path outlines a darker subject within a lighter background or vice versa.



Choosing **Non-White Areas** makes QuarkXPress look for colored or shaded areas (you define a white value in the **Threshold** field). A clipping path then removes the white areas.

- 4** Fine-tune the clipping path using the automatic controls: To bring the path boundary two points inward, enter -2 in the Outset field.

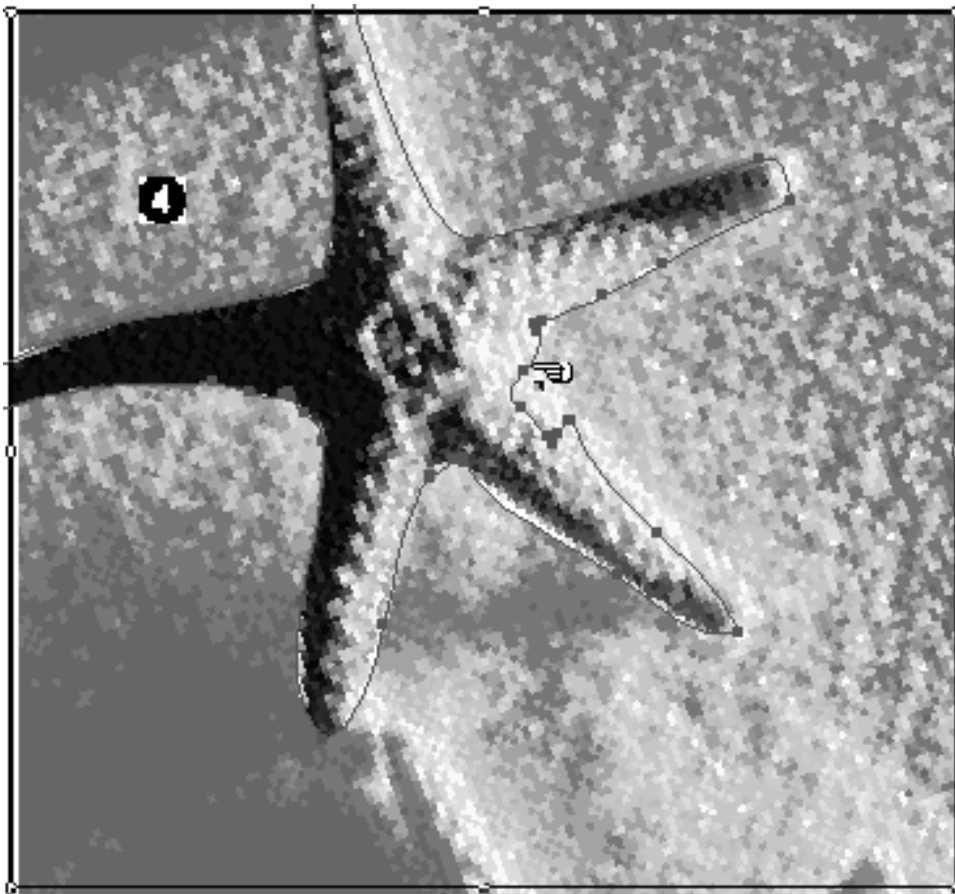
Notice the **Smoothness** value, which controls clipping path accuracy. The default is 2, which is often about right for a small image like this one. (Entering a value that is too low may create an overly complex path that has bitmapped edges.)

Notice the **Threshold** value, which determines how light a pixel can be before it is considered “white.” For example, the default value of 10% means that QuarkXPress (when set to clip around non-white areas) will attempt to eliminate all pixels within the range of 0–10% black. For an image like this one, 10% is about right. Click OK.

The starfish now appears to be outlined more appropriately, but there are still a few white pixels that weren’t eliminated.

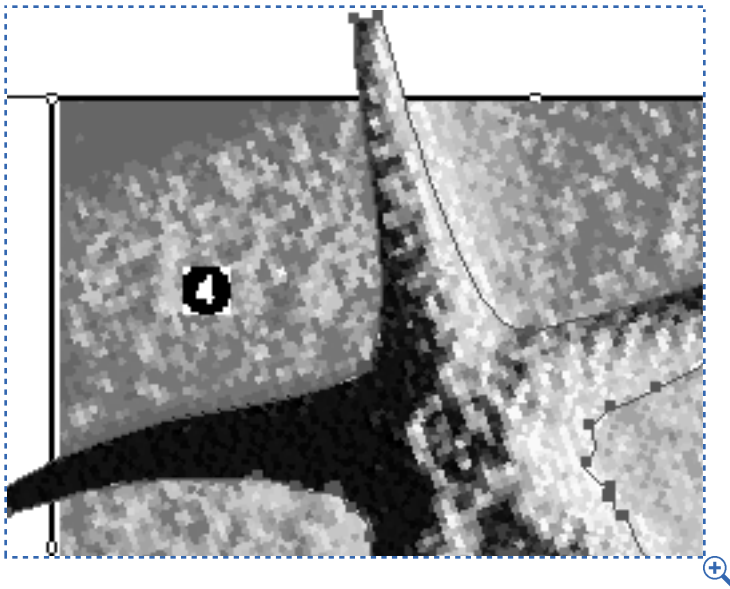
5 | **Fine-tune the clipping path manually:** Choose **Item** → **Edit** → **Clipping Path**. A green clipping path displays, defined by Bézier points. Notice the Point pointer  and the Line Segment pointer  display as you move the pointer over the clipping path. (Zoom in for a better view if you like.)

Drag points and segments inward to eliminate stray background pixels that didn’t get clipped out. (If you need to add points, press **⌘/ALT** while you click to do so.) You can also drag points outward to include white areas that are part of the starfish. When you’re finished editing the path, choose **Item** → **Edit** → **Clipping Path** to hide the points.



The small green squares represent Bézier points on the clipping path. You can manually edit a clipping path to make the path even more accurate.

- 6** **Reveal the concealed starfish tips:** Choose **Item** → **Clipping**. Uncheck **Restrict to Box** to remove the masking effect caused by the picture's box, revealing the concealed tips of the starfish's arms. Click **OK**.



If **Restrict to Box** is unchecked, the picture box boundary no longer masks the arms.

 **Good candidates for Non-White Area paths:** The best images for **Non-White Areas** are those with light backgrounds and dark subjects (or vice versa). If you use a grayscale or color image that has similar tonal values throughout, QuarkXPress will have a difficult time distinguishing the subject from the background.

Modifying Text Runaround

Text runaround, sometimes called text wrap, lets you control the way text runs behind, around, or within items and pictures. In this task you'll run text around all sides of a picture box.



Keyboard Commands for Mac OS:

Fit in Window	.⌘+0 (zero)
Show/Hide Guides	.F7
Get Text	.⌘+E
Bring Forward	.⌘+F5
Modify	.⌘+M
Runaround	.⌘+T
Delete	.⌘+K
Duplicate	.⌘+D
Close	.⌘+W

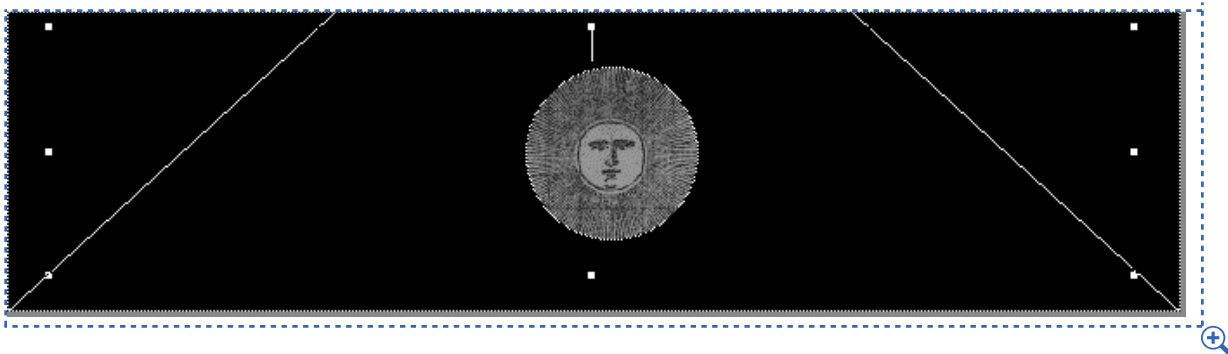


Keyboard Commands for Windows:

Fit in Window	.CTRL+0 (zero)
Show/Hide Guides	.F7
Get Text	.CTRL+E
Bring Forward	.CTRL+F5
Modify	.CTRL+M
Runaround	.CTRL+T
Delete	.CTRL+K
Duplicate	.CTRL+D
Close	.CTRL+F4

- 1 View the entire page with guides: Choose **View** → **Fit in Window**, then choose **View** → **Show Guides**.

- 2** Select the text box at the bottom of the right hand page: Using the Content tool , click the inner box at the bottom of the page to select it.

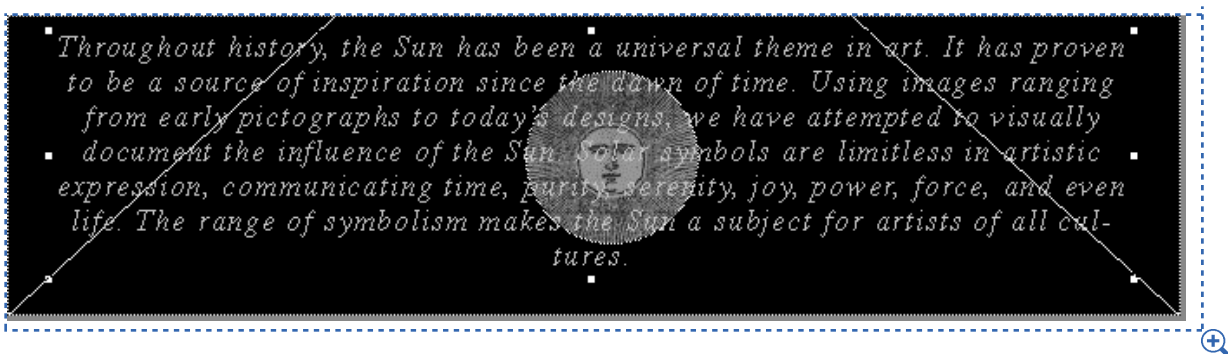


Activate the text box. You'll run text around the picture box with the sun image.

- 3** Import some text: Choose **File** → **Get Text**. Open the "Module 2" folder, then open the "Lesson 6" folder. Select the "Sun.xtg" text file.

Make sure **Include Style Sheets** is checked, then click **Open**.

!!! If a dialog box opens pertaining to the XPress Tags version, click **OK**.

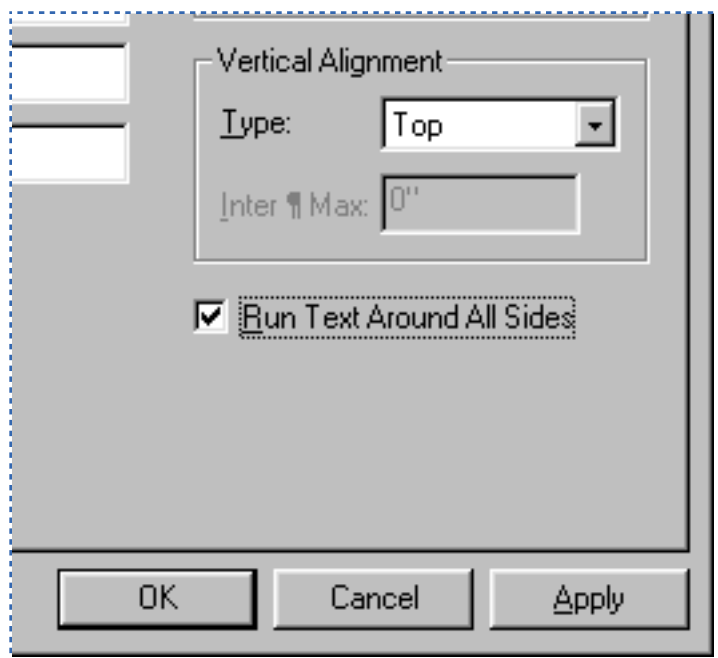


The text runs over the picture because the text box is in front of the picture box.

- 4** Select the picture behind the text box and bring it forward: With the text box selected, press **⌘+Option+Shift/CTRL+ALT+SHIFT**, then click the sun picture to select it.

On Mac OS, press **Option** while you choose **Item** → **Bring Forward**. On Windows, choose **Item** → **Bring Forward**.

- 5** **Run text around all sides of the sun picture:** Select the text box and choose **Item** → **Modify**, then click the **Text** tab. Check **Run Text Around All Sides**. Click **OK**.



Generally, the front item is in charge of runaround attributes; however, text boxes determine whether their text will run around all sides of obstructing items.

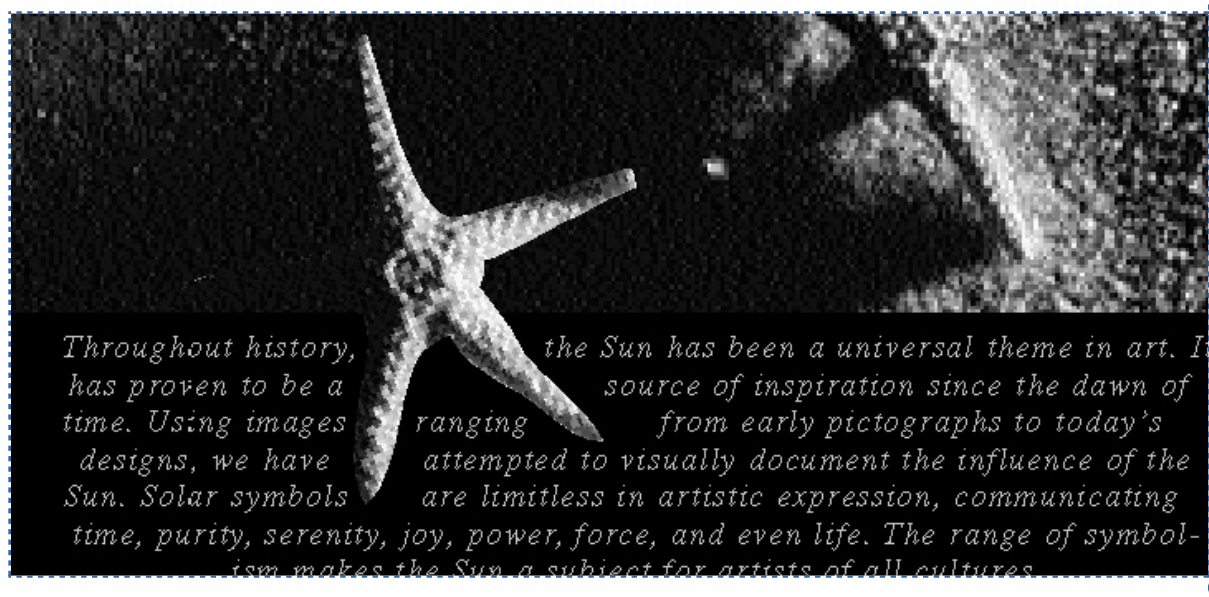


Now text runs around all sides of the sun picture.

- 6** **Delete the sun picture and run text around a new picture:** Select the sun picture and choose **Item** → **Delete**. Select the starfish at the upper left (the clipped starfish from the previous exercise). Choose **Item** → **Duplicate**.

Using the Item tool , drag the duplicate starfish down until the bottom two arms of the starfish overlap the text box at the bottom of the page. The text wraps in a rectangular shape (around the item's picture box).

- 7** | **Change the runaround for the picture:** With the new starfish still selected, choose **Item** → **Runaround**. Choose **Same as Clipping** from the **Type** menu to make the text run around the arms of the starfish. Click **OK**.



When **Same as Clipping** is chosen in the **Type** menu of the **Runaround** tab, text runs around the clipped picture subject.

- 8** | **Close and save the document:** Choose **View** → **Hide Guides** to get a better idea of how the page looks. Choose **File** → **Close**. If you haven't recently saved your document, a dialog box asks you to save it. Click **Yes**.

 **Running text around all sides of items:** To run text around all sides of front items make sure **Run Text Around All Sides** is checked in the **Text** tab. This is the only runaround attribute that acts on the text box itself. All other QuarkXPress runaround controls act on the items placed in front of the text box.

 **Runaround and clipping paths:** Runaround paths tell QuarkXPress where to wrap text, and clipping paths tell QuarkXPress which parts of a picture to show and hide. You are not limited to using the same settings for runaround and clipping paths. Use different settings to create special effects.

 **Magenta runaround path and blue item outline:** The magenta path in the **Preview** area of the **Runaround** tab represents the runaround path, and the blue outline represents the item's picture box.



Checkpoint

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Manipulate picture contrast
- Create and modify clipping paths
- Control text runaround

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Select a color picture and manipulate its contrast. Choose from various color models, like **HSB** and **CMYK**, turn various channels on and off, and experiment with the contrast curves.
- Import a color picture with an embedded clipping path or alpha channel. Select the embedded path or alpha channel in the **Clipping** tab to implement it.
- Create a freehand shape and place it on some text, or use a clipped picture. Practice your new runaround techniques.



The lesson files are all templates, which means you can open copies of them without affecting the original files.

Picture Contrast

Most picture manipulation occurs in the **Style** menu, when a picture is selected. The availability of the commands in the **Style** menu for pictures varies depending on the file format of the selected picture.

Picture type	Color	Shade	Negative	Contrast	Halftone
EPS/DCS	no	no	no	no	no
JPEG					
Grayscale	yes	yes	yes	yes	yes
Color	*	*	yes	yes	no
OS/2 bitmap					
1-bit	yes	yes	no	no	yes
Color	*	*	yes	yes	no
PAINT	yes	yes	no	no	yes
PhotoCD	no	no	yes	yes	no
PICT					
1-bit bitmap	yes	yes	no	no	yes
Grayscale bitmap	yes	yes	yes	yes	yes
Color bitmap	*	*	yes	yes	no
Object-oriented	no	no	no	no	no
Scitex CT					
Grayscale	*	*	yes	yes	no
Color	*	*	yes	yes	no
TIFF					
1-bit	yes	yes	yes	no	yes
Grayscale	yes	yes	yes	yes	yes
Color	*	*	yes	yes	no
Windows bitmap (BMP)/PCX					
1-bit	yes	yes	yes	no	yes
Grayscale	yes	yes	yes	yes	yes
Color	*	*	yes	yes	no

*Adjustable through the **Picture Contrast Specifications** dialog box (**Style** → **Contrast**).



Embedded paths and alpha channels: Adobe Photoshop® is capable of embedding paths and alpha channels in an image, both of which can be accessed in QuarkXPress via the **Clipping** tab in the **Modify** dialog box. QuarkXPress scans paths and channels to create QuarkXPress clipping paths based on the information. TIFFs can have embedded paths and alpha channels. EPS, JPEG, PICT, and Scitex CT formats can only have embedded paths.



What's an alpha channel? Alpha channels are saved in image-editing applications. They are selections (not paths) created as 8-bit masks. A mask is a black-and-white or grayscale image used to indicate which parts of the main image can be edited while working in the image-editing application. QuarkXPress can use embedded alpha channel information to define a clipping path.

Clipping Paths

Clipping paths determine visible and ignored portions of an image. You can create and modify clipping paths for certain types of images directly in QuarkXPress, and you can access alpha channels and clipping paths saved with images by other applications.



The image at left shows a picture with all of its image data. The image at right shows how a clipping path can make background image data transparent.

Creating clipping paths

Select a picture and choose an option from the **Type** menu in the **Clipping** tab (**Item** menu):

- Choose **Item** to crop an image to the picture box. **Item** does not create a clipping path, it simply crops the picture to its picture box.
- Choose **Embedded Path** to clip a picture around a path already embedded in the picture file. Choose a path from the **Path** menu if the picture file contains more than one embedded path.
- Choose **Alpha Channel** to clip a picture around an alpha channel already embedded in the picture file. Choose an alpha channel from the **Alpha** menu if the picture file contains more than one embedded alpha channel.
- Choose **Non-White Areas** to create a QuarkXPress clipping path based on the picture's subject. Depending on the image and the value in the **Threshold** field, the clipping path will outline a non-white figure within a larger white or near-white image (or vice versa if **Invert** is checked).
- Choose **Picture Bounds** to clip a picture around the rectangular "canvas area" of the imported picture file. This includes any white background areas saved with the original picture file.

Fine tuning the clipping path

When you choose **Embedded Path**, **Alpha Channel**, or **Non-White Areas**, various fields are available that let you manipulate the clipping path. Enter values in the fields to modify the path.

- Enter values in the **Outset** field to change the size of the clipping path. Positive values increase the amount of image included, negative values decrease the amount of image included.
- Enter values in the **Noise** field to identify and delete paths around stray pixels. For example, if you set the **Noise** value to 5 pt, any paths in the graphic that are less than 5 pt will be removed. This is useful for removing unwanted pixels (specifically by deleting small paths around the pixels) in the background of an image.
- Enter values in the **Smoothness** field to specify clipping path accuracy. A lower value creates a more complex path with a greater number of points (because it more closely follows the subject). A higher value creates a less accurate (but smoother and faster) path. This is similar to the flatness setting in many image-editing applications.
- Enter values in the **Threshold** field to specify how QuarkXPress determines dark pixels from light pixels. When **Non-White Areas** is chosen, any pixel shaded below the **Threshold** value (zero indicating white) is excluded from the clipping area, and any pixel above it is included. The reverse is true for alpha channels.



Enter values in the **Threshold** field to define and exclude white. At 0 (left), everything is included because there are no stark white areas in this image. At 10% (center), everything lighter than 10% gray is defined as white. At 75% (right), everything lighter than 75% gray is defined as white, so only very dark areas are included in the clipping path.

!!! **Threshold** is only available for **Non-White Areas** and **Alpha Channel**. (You can alter the **Threshold** when an alpha channel is selected because alpha channels can be grayscale.)

Creating special effects

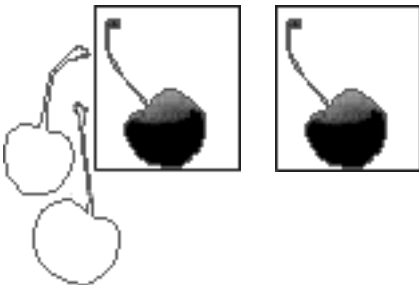
Options in the **Clipping** tab (**Item** menu) let you specify whether a clipping path includes holes, or only its outer edge. You can also choose to invert a clipping path so that the background area shows and the subject is cut out.

- Check **Invert** to make visible regions transparent and transparent regions visible.
- Check **Outside Edges Only** to select the outer path. Uncheck **Outside Edges Only** to include paths which define holes.
- Check **Restrict To Box** to crop the picture to the picture box. Uncheck **Restrict To Box** to extend the image beyond the box boundaries.



Check **Restrict To Box** to use the picture box as the cropping boundary (left). Uncheck it to use the clipping path as the cropping boundary (right).

- Click **Crop To Box** to delete portions of the path that fall outside box borders.



Position an unwanted portion of an image outside the box boundary (left), then click **Crop To Box** to delete it (right). When you move the cropped item within the box, the cropped area remains invisible. Click **Rescan** to regenerate the path.

 **Noise values and the concept of multiple paths:** A clipping path is capable of containing many *paths*. For example, if you have a picture of two donuts and a scattering of crumbs (and your **Clipping** tab settings are set to render this scenario), a QuarkXPress clipping path could show two paths around the two donuts, two paths around the donut holes, and a plethora of tiny paths around the crumbs. All these paths are considered to be *one* clipping path. To delete the tiny crumb paths, enter a value in the **Noise** field that corresponds to their diameters (like 5 pt), then any path in the graphic that is less than 5 pt in diameter will be removed.

Text Runaround

The **Runaround** tab of the **Modify** dialog box (**Item** menu) lets you control the way text wraps around pictures, lines, text paths, and boxes. You can create a text wrap that mimics or diverges from a picture's clipping path for interesting effects.



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In this image, text is wrapping around a text path.

Creating a runaround path

Select the item you want text to wrap around, then choose **Item** → **Runaround**. Choose an option from the **Type** menu; options vary according to the selected item:

- For all types of items, choose a runaround of **None** (to run text behind the item) or **Item** (to run text around the item).
- Lines and text paths offer **Manual** runaround, which makes the path available for editing.
- For a picture, choose **Auto Image** to create a **Non-White Areas** runaround path that also serves as a clipping path. (The clipping path controls are not accessible when this option is chosen.)
- Choose **Embedded Path** to run text around a path embedded in an image.
- Choose **Alpha Channel** to run text around an alpha channel embedded in an image.
- Choose **Non-White Areas** to create a path based on the picture's subject.
- Choose **Same As Clipping** to set the text runaround path to the clipping path selected in the **Clipping** tab (**Item** menu). You cannot manually edit the runaround path when you choose this option.
- Choose **Picture Bounds** to run text around the rectangular “canvas area” of the imported picture file.

Editing runaround paths

If a runaround path requires further adjustment, choose **Item** → **Edit** → **Runaround** to access and manipulate the Bézier runaround path. For visual distinction and ease in editing, the runaround path displays as a magenta outline.

7

Working with Page Elements

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7

Working with Page Elements

What's Ahead

Page elements are the boxes and lines that make up a QuarkXPress layout, and this lesson is about using them effectively. You'll learn how to stack items to create layered visual effects, group items that have an exact spatial relationship, place frequently used items in libraries for future use, and align boxes automatically to ensure precision.

In this lesson you'll manipulate page elements in a half-completed document. To see the finished spread, open "Sun.qxt" in the "Lesson 4" folder inside the "Module 2" folder and go to its page 13.

Modifying Stacking Order

The term “stacking order” refers to the front-to-back relationship among the boxes and lines on a page. Each item you create occupies its own level in the stacking order. In this task you’ll restack items to display a background design.



Keyboard Commands for Mac OS:

Open⌘+O
 Save as⌘+⇧+S
 Send to Back⇧+F5
 Send Backward⇧+⇧+F5



Keyboard Commands for Windows:

Open CTRL+O
 Save as CTRL+ALT+S
 Send to Back SHIFT+F5
 Send Backward CTRL+SHIFT+F5

1 | **Open the “Page.qxt” template:** Choose **File → Open**. Open the “Module 2” folder, then open the “Lesson 7” folder. Select “Page.qxt” and click **Open**. A new document based on the template displays.



If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

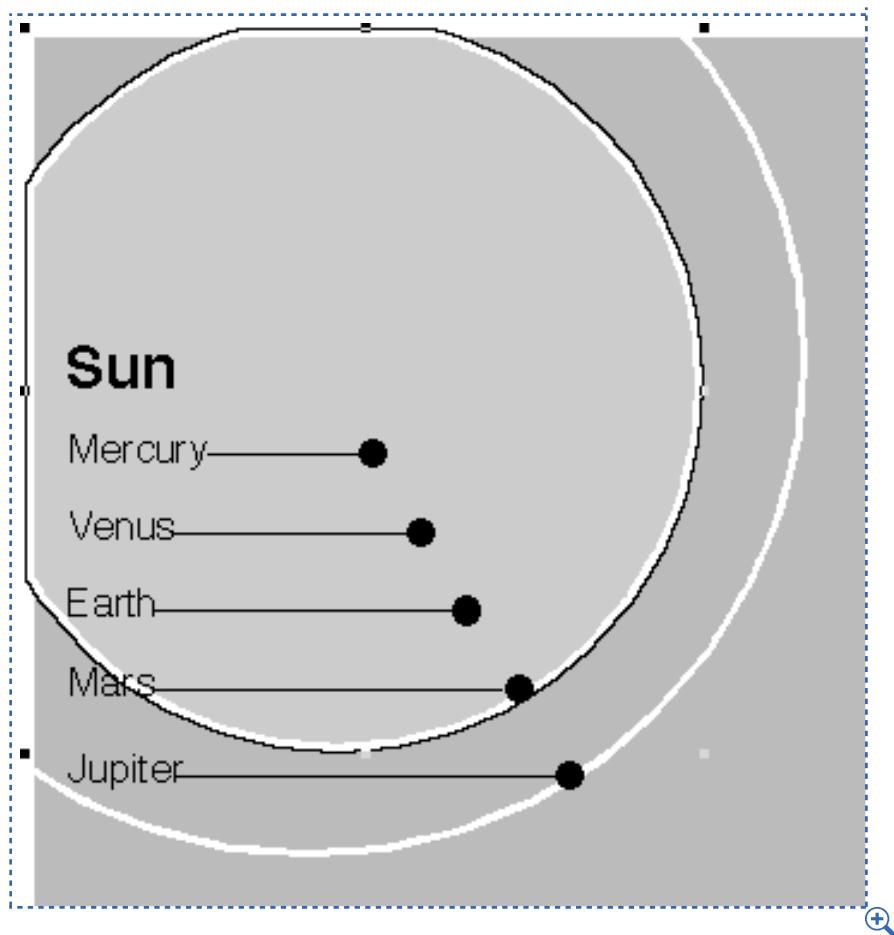
2 | **Save the document in the Student Files folder:** Choose **File → Save as**. Enter a descriptive name such as “Stacking.qxd” in the **Save current document** as field. (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

3 | **Send the large black box to the back of the stack:** Using either the **Item tool**  or the **Content tool** , click the large black box to select it.

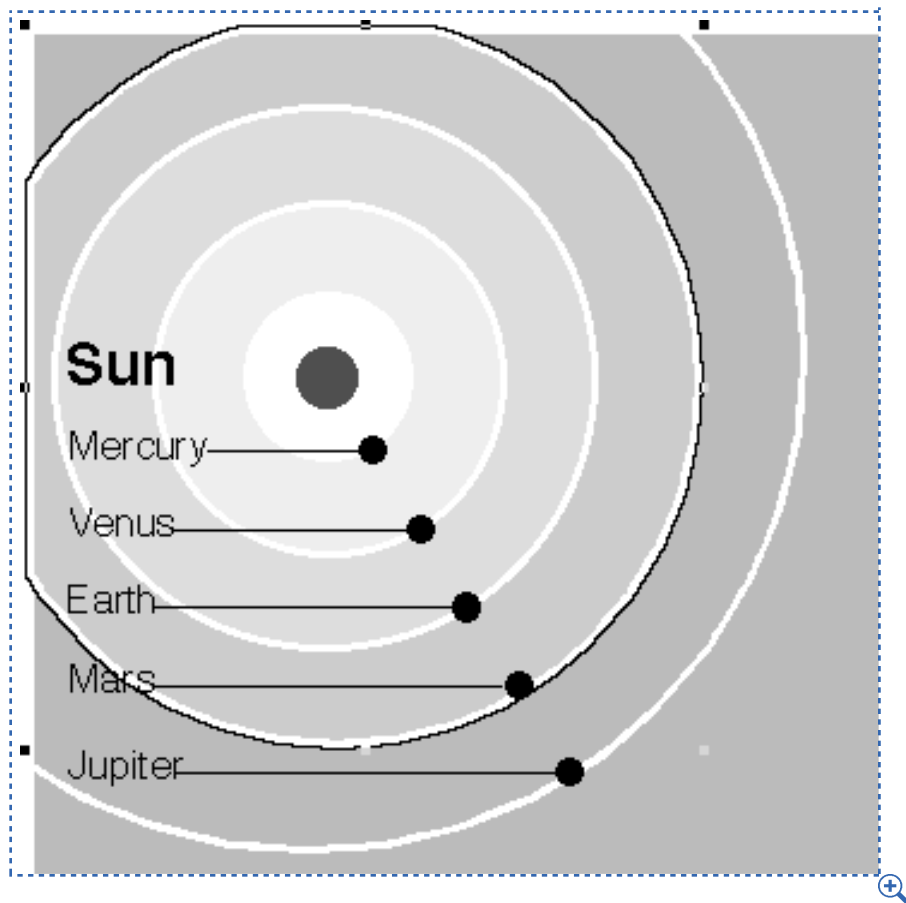
Choose **Item → Send to Back** to reposition it at the back of the stacking order so you can see the other items. The box becomes the background for the rest of the page.

- 4** View the light-gray circle in the upper-left corner: Click the smallest light-gray circle (shown below with the word “Sun” in it) and choose View → 200%.



You'll send this circle back several levels.

- 5** Move the circle four levels back in the stacking order: On Mac OS, press Option and choose **Item** → **Send Backward** four times until the circle is correctly layered. On Windows, choose **Item** → **Send Backward** four times until the circle is correctly layered.



Moving the circle backward reveals hidden items.

 **Selecting hidden items:** If you have an item that's hidden behind other items, you can press a combination of keyboard commands and click where the items overlap until you select the desired item. On Mac OS, press ⌘+Option+Shift and click where the items overlap until you select the desired item. On Windows, press CTRL+ALT+SHIFT and click where the items overlap until you select the desired item.

 **Wrapping text around items and pictures:** Text wraps around items that are in front of its text box. If you place a text box on top of a picture, the text displays over the picture. If you place a picture on top of a text box, the text can wrap around the box or picture. Whether and how text wraps also depends on the settings in the **Runaround** tab of the **Modify** dialog box (**Item** menu).

Changing Box Content

You can convert any box so it can hold another type of content. For example, if you have a carefully drawn Bézier picture box, and you decide you want to flow text into the box, you can convert the picture box to a text box. In this task you'll convert picture boxes to boxes that contain only color.



Keyboard Commands for Mac OS:

Fit in Window⌘+0 (zero)
 Show/Hide Guides F7
 Show/Hide Colors F12



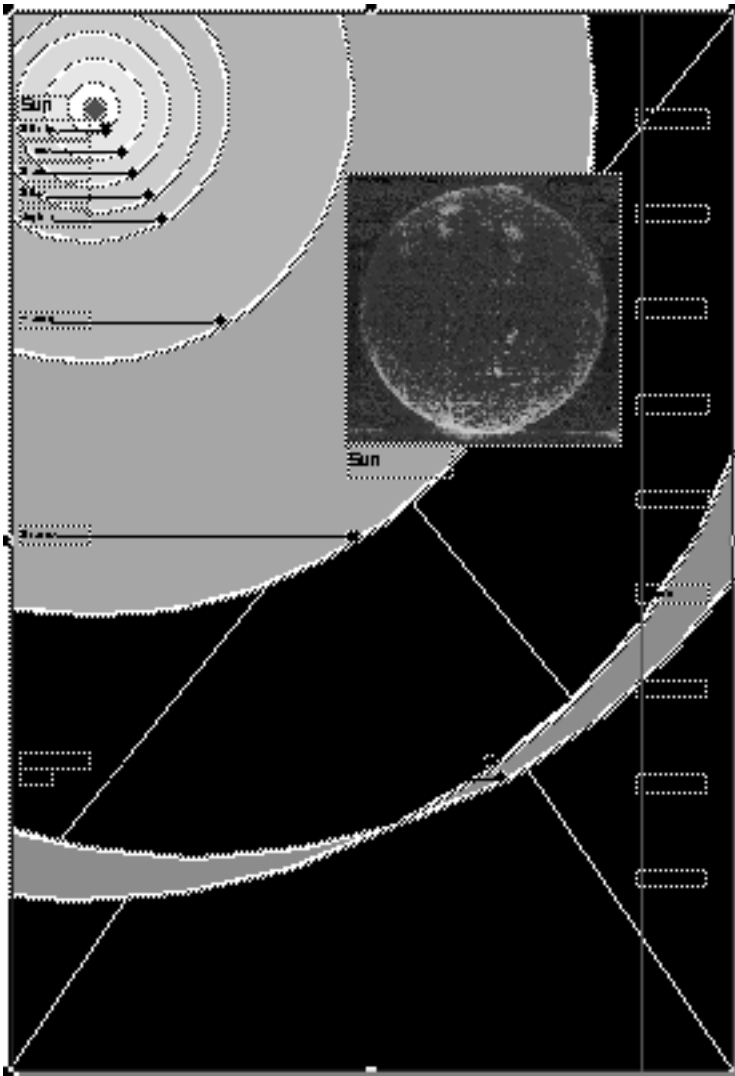
Keyboard Commands for Windows:

Fit in Window CTRL+0 (zero)
 Show/Hide Guides F7
 Show/Hide Colors F12



1 View the entire page with guides: Choose **View → Fit in Window**, then choose **View → Show Guides**.

- 2** Convert the two black picture boxes to “contentless” boxes: Using either the Item tool  or the Content tool , select either one of the semi-circular black picture boxes.



This page has two black picture boxes that do not contain pictures. To simplify the document, you can convert them to boxes without content.

Choose **Item** → **Content** → **None**. The “X” that indicates a picture box disappears.

Click to select the other black box and choose **Item** → **Content** → **None**.

3 | **Change the color saturation of the boxes to complete the background design:** Choose **View → Show Colors**. Click the background icon  in the **Colors** palette. Notice the **Shade** menu to the right of the icon.

Select the semi-circular black box in the middle and choose **40%** from the **Shade** menu.

Select the semi-circular black box at the bottom and choose **50%** from the **Shade** menu.

Choose **View → Hide Colors**.

 | **Boxes with no contents:** Most boxes you create in QuarkXPress will contain text or pictures. However, you'll create some boxes to simply contain background colors, blends, or frames. To simplify documents, you can convert these boxes to "contentless" boxes. Contentless boxes can be framed, or filled with a background color, shade, or blend, but they cannot contain text or pictures. Think of contentless boxes as art boxes, and use them to create original shapes containing only colors and frames.

 | **Distinguishing text boxes from picture boxes:** When **Guides** are showing, an empty picture box can be distinguished from an empty text box because a picture box displays an "X" pattern. When page elements are stacked on top of each other (as in this sample document), the X pattern is hard to discern. Look for parts of the X to identify picture boxes.

Working with Groups

You can combine multiple items into a group and treat them as one item. With a group, you can move, cut, copy, duplicate, resize, and otherwise manipulate multiple items while retaining the ability to manipulate individual items. In this task you'll select the background items and group them.



Keyboard Commands for Mac OS:

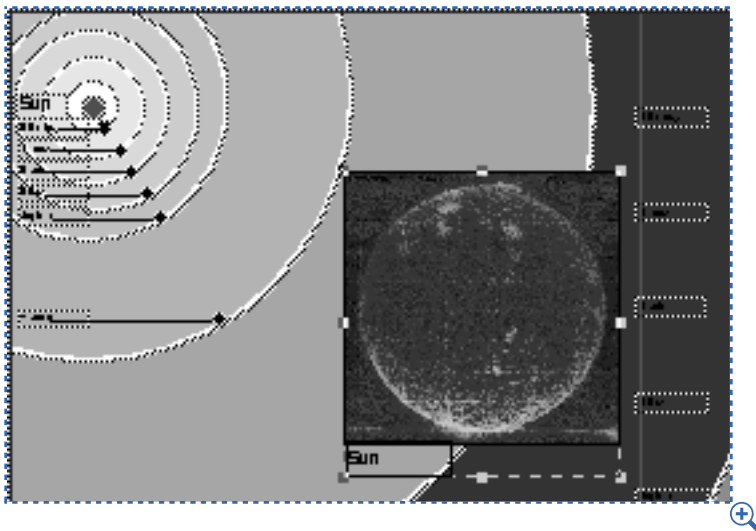
Group⌘+G
 Resize group⌘+⌥+⇧+drag



Keyboard Commands for Windows:

Group CTRL+G
 Resize group CTRL+ALT+SHIFT+drag

1 **Group the sun graphic and its caption:** Using either the Item tool  or the Content tool , Shift+click to select the color picture of the sun and the text box containing the word “Sun.” Choose **Item** → **Group**.



Groups display a dashed border and one set of resize handles when you select them with the Item tool .

2 Manipulate the items as a group: Using the Item tool , drag the grouped items to any different location. Resize the entire group by pressing $\mathbb{H}$ +Option+Shift/CTRL+ALT+SHIFT while you drag a resize handle. Make the group larger or smaller as you wish.

Using the Content tool , select the text box within the group. Resize the box, edit the text, or modify the box as you wish. Select the picture box within the group. Make any changes you wish to the picture or box.

 Make sure the group is not obscuring the text boxes down the right side of the page. You will use these boxes for the next task.

 **The reason to group:** Why use groups? You can group all the items that make up a frequently-used publication nameplate or company logo. Once grouped, you can modify or move multiple items as you would a single box, line, or text path.

 **Modifying groups:** When the Item tool  is selected, you can manipulate an entire group (move it, resize it, etc.). When the Content tool  is selected, you can manipulate an individual item in the group. To move a single item within a group, press $\mathbb{H}$ /CTRL while you click it.

Using Libraries

Libraries are convenient for storing frequently-used page items such as logos, legal text, and photographs. You can store any items and their contents in a library, including text boxes, text paths, picture boxes, lines, and groups. Libraries display as palettes that contain thumbnail previews of items. In this task you'll open, use, and save an item in a library.



Keyboard Commands for Mac OS:

Open⌘+O
Ungroup⌘+U



Keyboard Commands for Windows:

Open CTRL+O
Ungroup CTRL+U

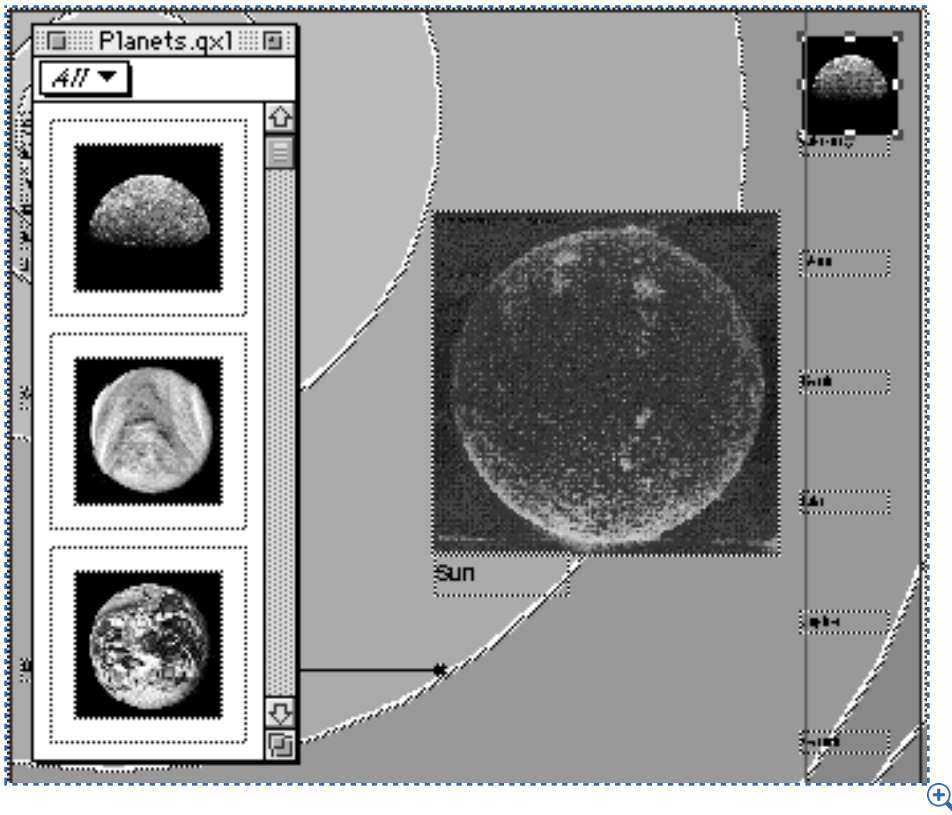
1 | **Open the “Planets.qxl” library:** Choose **File → Open**. Open the “Module 2” folder, then open the “Lesson 7” folder. Select “Planets.qxl” and click **Open**.



If the **Nonmatching Preferences** dialog box displays, click **OK**.

- 2** Place the picture of Mercury in the upper-right corner: Using either the Content tool  or the Item tool , select the first picture in the library (the planet Mercury).

Drag it to the upper-right corner of the page above the “Mercury” caption. Release the mouse to place it in the document.



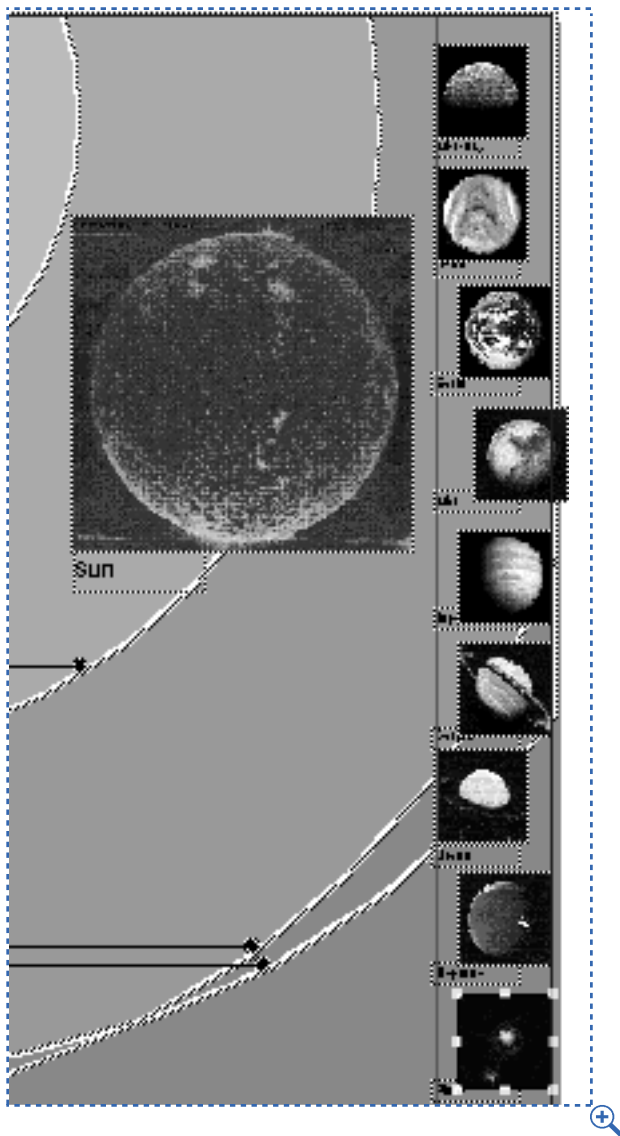
Drag and drop library items using either the Item tool  or the Content tool .

- 3** Reposition Mercury: Enter 6.55 in the X field and 0.25 in the Y field in the Measurements palette. Press Return/ENTER.

4 Retrieve planets from the library and place them under Mercury:

Drag each planet picture (in order, starting with the second library picture) into the document and position it above its respective caption on the right side of the page. Scroll vertically through the library or expand the palette to access each picture.

Don't worry about placing the pictures exactly. The next task teaches you how to space items precisely.



Roughly position each planet between the green guide and the edge of the page.

5 **Place the picture of the Sun in the library for future use:** Using the Item tool , click the sun group you created in the last task. Drag the sun group over the Planets library; release the mouse when the Library pointer  displays.

Double-click the new library entry. Click the arrow next to the Label field to see all the existing labels. Rather than selecting one, enter Sun in the field and click OK.

Click the **Label** menu on the library and choose **Sun**. This displays only library entries labeled **Sun**. Experiment with choosing other labels.

6 **Save and close the library:** Click the close box to close the library (this will save the changes to it).

 **Libraries vs. templates:** Before you store all your frequently used page elements in a library, consider whether the items would be more useful as part of a template. For example, you may want to store a nameplate for a newsletter in a template rather than dragging it in from a library for each issue. If you feature various columnists in each issue of your newsletter, you may want to store the columnists' photographs in a library rather than in a template.

 **Labeling library entries:** To organize and locate library entries, you can label them. You can create generic labels to apply to a certain category of entries (for example, "columnist photos"). Or, you can create a different label for each entry (for example, "The Advice Columnist"). The **Label** menu on the library palette lets you display all the library entries, the entries for one label, or the entries for multiple labels.

Spacing and Aligning Items

The **Space/Align** feature in QuarkXPress automatically spaces multiple-selected items throughout a page according to your specifications. Items can be aligned, spaced apart, and evenly distributed horizontally and vertically. In this task you'll evenly space and vertically align the planet pictures.



Keyboard Commands for Mac OS:

Space/Align	.⌘+, (comma)
Group	.⌘+G
Show/Hide Guides	.F7
Close	.⌘+W

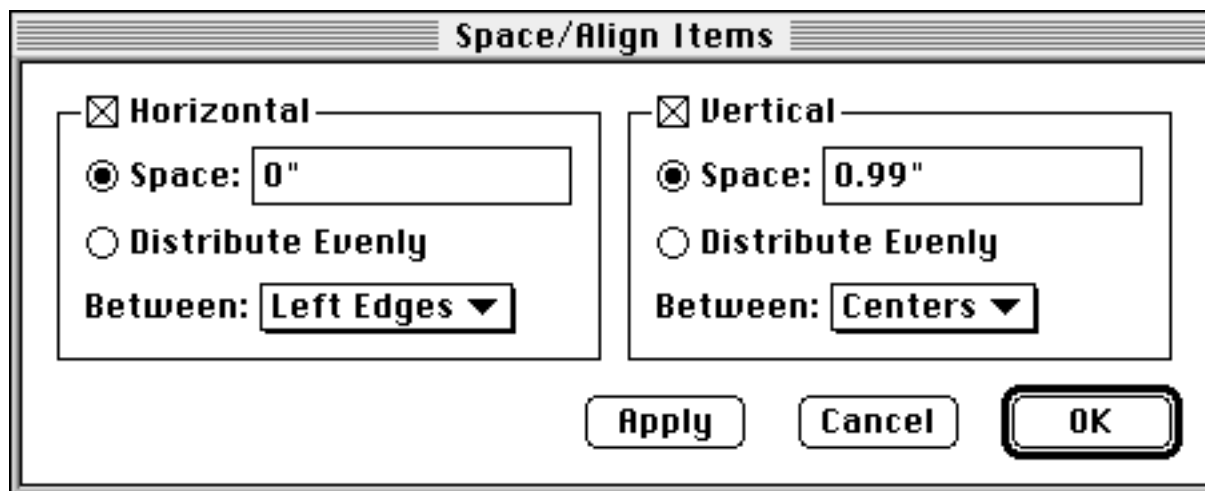


Keyboard Commands for Windows:

Space/Align	.CTRL+, (comma)
Group	.CTRL+G
Show/Hide Guides	.F7
Close	.CTRL+F4

1 **Select all the planets:** Make sure none of the other planet pictures are to the left of Mercury. (If their X coordinates are less than 6.55", the items won't align properly.) Using either the Item tool  or the Content tool , Shift+click to select all the planets.

- 2** **Space and align the planets:** Choose **Item** → **Space/Align**. Check **Horizontal**, then choose **Left Edges** from the **Between** menu. Make sure the **Space** value is 0". Check **Vertical**, then enter 0.99 in the **Space** field. Choose **Centers** from the **Between** menu.



These settings align the planet pictures vertically and space them apart by 0.99".

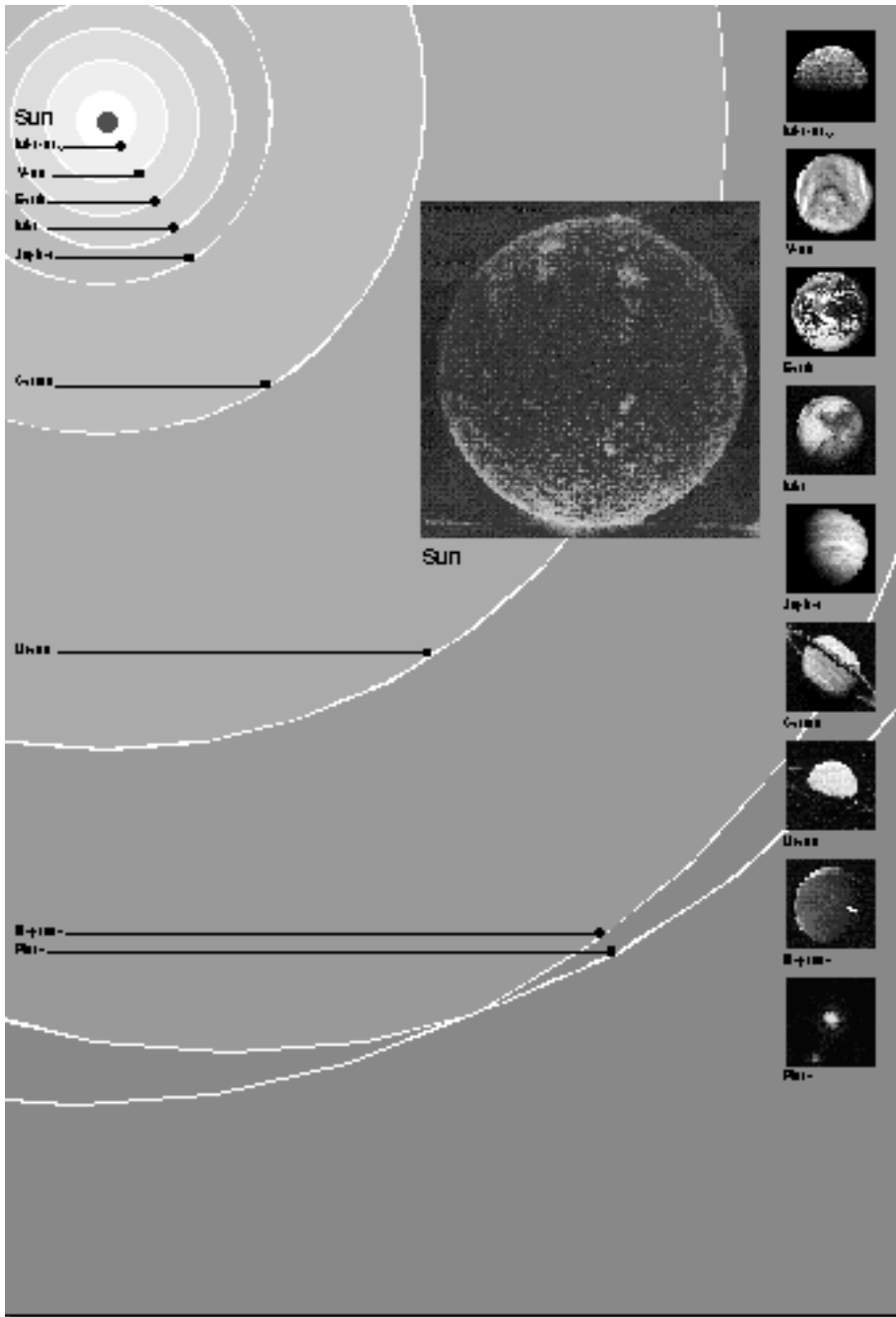
Click **Apply** to preview the results, then click **OK**.

- 3** **Group each planet to its caption:** Press Tab to deselect all items. Zoom in as necessary to see the planets and captions.

Shift+click to multiple-select the picture of Mercury and the caption containing the word "Mercury." Press ⌘+G/CTRL+G to create a group.

Group the remaining planet pictures with their respective captions.

4 Turn guides off to view the document: Choose View → Hide Guides.



Viewing the finished document.

5 **Close and save the document:** Choose **File** → **Close**. If you haven't recently saved your document, a dialog box asks you to save it. Click **Yes**.



How QuarkXPress spaces items: QuarkXPress looks at two things when both **Horizontal** and **Vertical** are checked: the active item on the top, and the active item on the left. Other items are then spaced relative to them. When spacing and aligning irregularly shaped items, QuarkXPress uses the bounding box outline to determine where the items should be positioned.

Checkpoint

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Move items backward and forward in the stacking order
- Convert boxes to picture, text, or contentless boxes
- Group and ungroup items
- Use and save libraries
- Space and align items

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

- Make boxes with different sizes, shapes, and colors; then manipulate their stacking order to create an artistic image or a layered background.
- Import any picture from the QuarkEd folders into a picture box, then try converting the box to a text or contentless box.
- Group multiple items, then select the Content tool  and manipulate individual items within the group.
- Create a new library (**File** → **New** → **Library**) and drag different kinds of boxes and groups into the library.
- Create several circles and try aligning them so they overlap horizontally using the **Space/Align** feature. Experiment with multiple items and various spacing options.



The lesson files are all templates, which means you can open copies of them without affecting the original files.

 Stacking Order

Stacking order refers to the position of an item (such as a box, text path, or line) relative to other items in front of or behind it. The stacking order of items is not only significant because it controls how items display — with items in front obscuring items in the back — but because stacking order also affects the way text wraps around items and pictures.

Sending backward and bringing forward

The **Send to Back** command places active items at the back of the stack. **Send Backward** places items one level back in the stacking order. The **Bring to Front** command places active items at the top of the stack. **Bring Forward** places items one level forward in the stacking order.

On Windows, the **Item** menu includes **Send Backward** and **Bring Forward** commands. On Mac OS, pressing the Option key before selecting the **Item** menu changes the **Send to Back** command to **Send Backward** and the **Bring to Front** command to **Bring Forward**.

Stacking attributes

Stacking is initially determined by the order in which items are created; the most recently created item is placed in front of other items. Boxes with background shades applied to them always obscure text, pictures, and items that are behind them. To make a box's background transparent so that items behind it are visible, apply a background of **None**. The picture or text may be opaque, but the box background itself is transparent. Items stacked in front of a box containing text cause text reflow if the overlapping items have a runaround type other than **None**.

Libraries

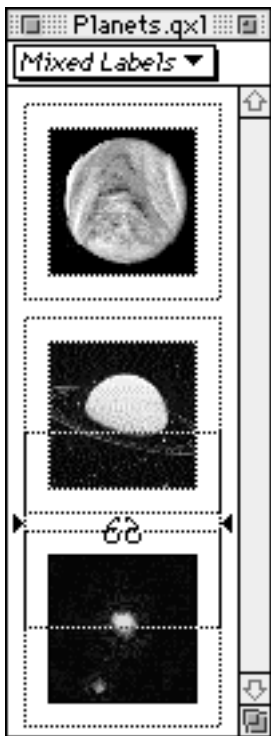
Libraries are palettes that contain a collection of QuarkXPress items. You can move items from document pages into an open library, from an open library onto document pages, and between open libraries.

Working with library files

To create a new library, choose **File → New → Library**. Specify a name and location for the file and click **Create**. To open an existing library, simply choose **File → Open**. Locate and select the file, then click **Open**. To close a library, click its close box (this automatically saves changes). You can save changes to a library as you make them by checking **Auto Library Save** in the **Save** tab of the **Application Preferences** dialog box (**Edit** menu).

Manipulating library entries

You can drag selected items into a library, rearrange the order of entries within a library, move entries from one library to another, replace library entries, and delete library entries.



The library pointer  displays when you drag selected items over a library.

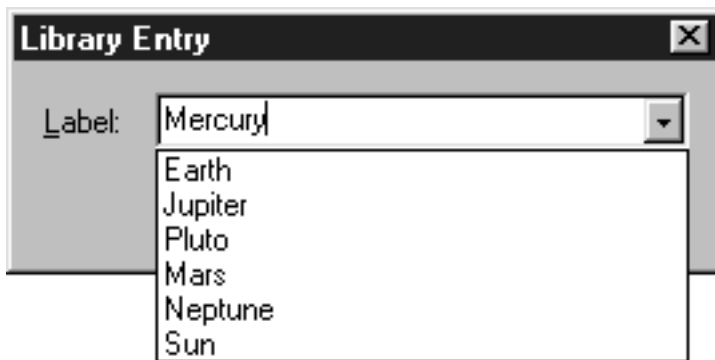
- To enter selected items in a library, drag the items over the library and release the mouse button when the library pointer  displays.
- To rearrange an entry within a library, click it and drag it to a new position. The arrow icons   indicate the entry's new position.

- To move an entry from one library into another, click it and drag it to the other open library. Delete the entry from the first library.
- To replace an entry in a library, select the replacement items in a document; then choose **Edit → Copy**. Click the entry in the library to select it, then choose **Edit → Paste**.
- To remove an entry from a library, click it and on Mac OS choose **Edit → Clear** and on Windows choose **Edit → Delete** or **Edit → Cut**.

Labeling library entries

QuarkXPress lets you manage your library entries by applying labels to them. You can apply the same label to multiple entries and you can selectively display library entries according to their labels. For example, if you have a library full of different corporate logos, you can label each entry with its appropriate company name.

- 1 To label library entries, double-click a library entry to display the **Library Entry** dialog box.
- 2 Type a descriptive name in the **Label** field or choose one from the **Label** menu. To rename a library entry, type in a new label or choose a different label from the menu.



Double-click a library entry to display the **Library Entry** dialog box. Enter a new label or choose one from the menu.

- 3 Click **OK**; the label now appears in the **Label** menu.

Displaying library entries by label

To display entries by label, click the **Labels** menu in the upper left corner of a library palette. Choose labels to display associated entries.

- The menu lists **All**, **Unlabeled**, as well as any labels you created.
- You can choose more than one label to display multiple categories of entries; each label chosen is shown checked in the menu.
- If you choose more than one label, **Mixed Labels** is displayed in the menu.

- To view all library entries, regardless of label, choose **All**.
- To view entries to which no label has been applied, choose **Unlabeled**. You can choose **Unlabeled** in addition to other labels.
- To hide entries to which a label is applied, choose the label again.



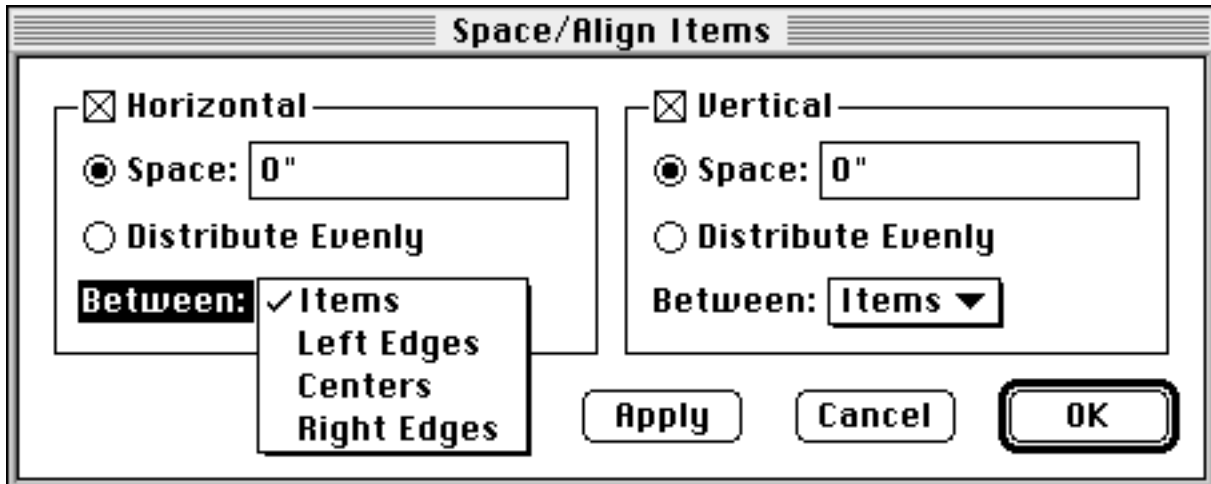
Pictures retain path to high-resolution files: When you place an item that includes a high-resolution picture into a library, QuarkXPress saves the path to the picture file's volume and folder. If the picture file is on an available disk, QuarkXPress can find it.



Library items affect defaults and preferences: When you drag a library item into a document, the following defaults and preferences are affected: Any style sheets, colors, dashes and frames, lists, or H&Js used in the library entry are automatically added to the document. If the *XPress Preferences* used in the library are different from those used in the document, text reflow may occur and any Frame Editor (bitmap) frames may not display.

Spacing and Aligning

The **Space/Align** dialog box lets you choose how to evenly space and distribute multiple items. Checking **Horizontal** lets you control horizontal spacing and alignment; checking **Vertical** lets you control vertical spacing and alignment.



Use the **Space/Align** command (**Item** menu) any time you need to distribute multiple items evenly on a page.

Spacing

You can specify an absolute amount of space between items, specify a percentage of space currently between items, or distribute space evenly between items. **Distribute Evenly** is available when three or more items are active. When checked, the left and right items (or top and bottom items) stay put while the items between move. Values entered in the **Space** field are ignored.

Aligning

You can also specify the part of an item (centers or edges) QuarkXPress uses to orient alignment by choosing an option from the **Between** menu.

- Choose **Items** to align between active items.
- Choose **Left Edges** to align between left edges of active items.
- Choose **Top Edges** to align between top edges of active items.
- Choose **Centers** to align between centers of active items.
- Choose **Right Edges** to align between right edges of active items.
- Choose **Bottom Edges** to align between bottom edges of active items.



Centering an item on a page: To center an item in the middle of a page, create a large box that is the exact size of the page. Select both the new box and the item you want centered. Choose **Item** → **Space/Align**. Choose **Centers** from the **Between** menu and click **OK**. Delete the large box when you're finished.

8

Preparing for High-Resolution Printing

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8

Preparing for High-Resolution Printing

What's Ahead

You can print a QuarkXPress document to a wide range of output devices. Whether you want to print preliminary color separations on a laser printer, or you need to collect files for output on a high resolution imagesetter, this lesson covers fundamentals about printing QuarkXPress documents and preparing electronic files for service bureaus.

In this lesson you'll use a finished document to print test separations and a color composite; then you'll collect the necessary files for output.

Printing Preliminary Color Separations

To get an idea how your final, imageset separation plates will look and register, you can print separations to a laser printer. In this task you'll open a completed spread from an article about color and printing and print laser separations.



Keyboard Commands for Mac OS:

Open⌘+O
 Save as⌘+⇧+S
 Print⌘+P



Keyboard Commands for Windows:

Open CTRL+O
 Save as CTRL+ALT+S
 Print CTRL+P

1 **Open the “Printing.qxt” template:** Choose **File → Open**. Open the “Module 2” folder, then open the “Lesson 8” folder. Select “Printing.qxt” and click **Open**. A new document based on the template displays.



If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

2 **Save the document in the Student Files folder:** Choose **File → Save as**. Enter a descriptive name such as “Printing.qxd” in the **Save current document as** field. (For cross-platform compatibility, use the three-character extension “.qxd” in the name.)

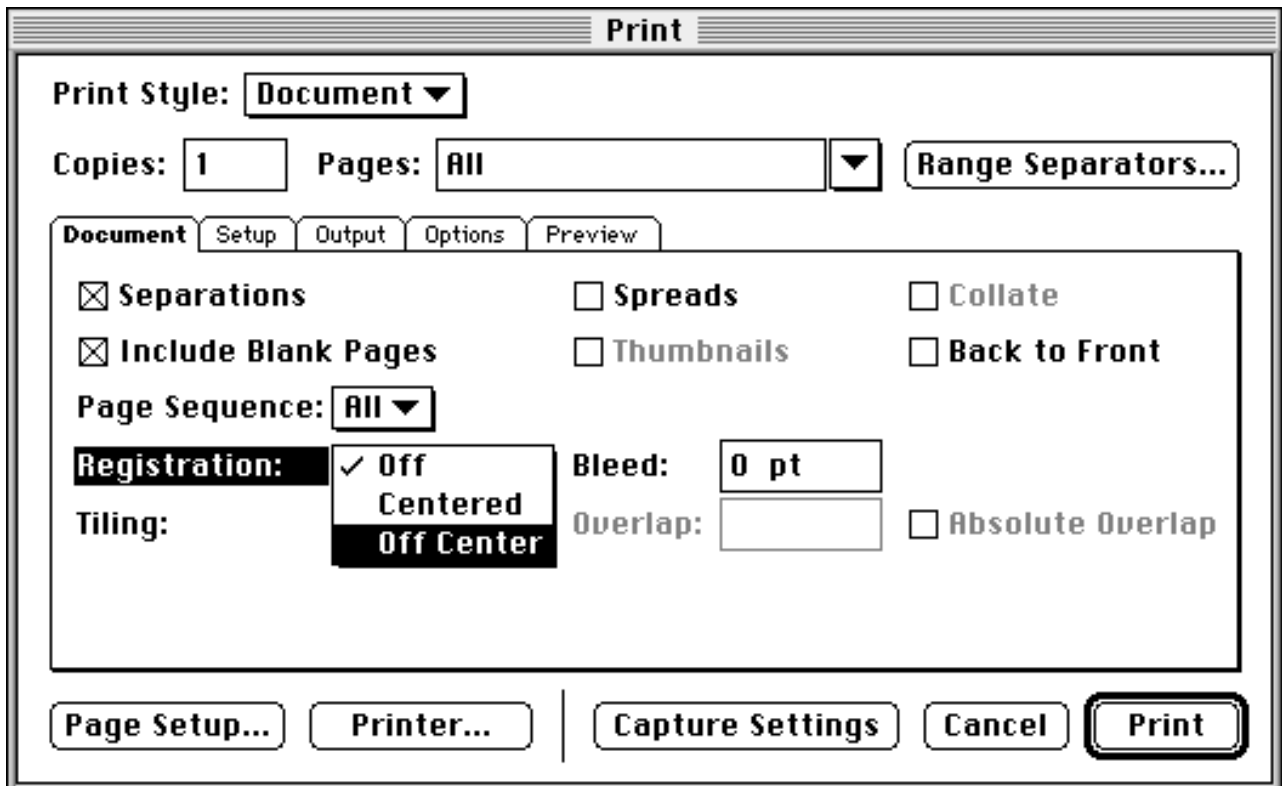
Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

3 **Select a black and white printer:** On Mac OS, choose a black and white printer from the Chooser (**Apple** menu). On Windows, either set the black and white printer as your default printer or select it in the **Print** dialog box (**File** menu).



Printer description files for specific printers are available from the printer manufacturer. If no appropriate printer description file is available from the menu, contact the printer manufacturer or refer to the software that was shipped with your printer.

- 4** Specify to print separations: Choose **File** → **Print**. In the **Document** tab, check **Separations**. Choose **Off Center** from the **Registration** menu.



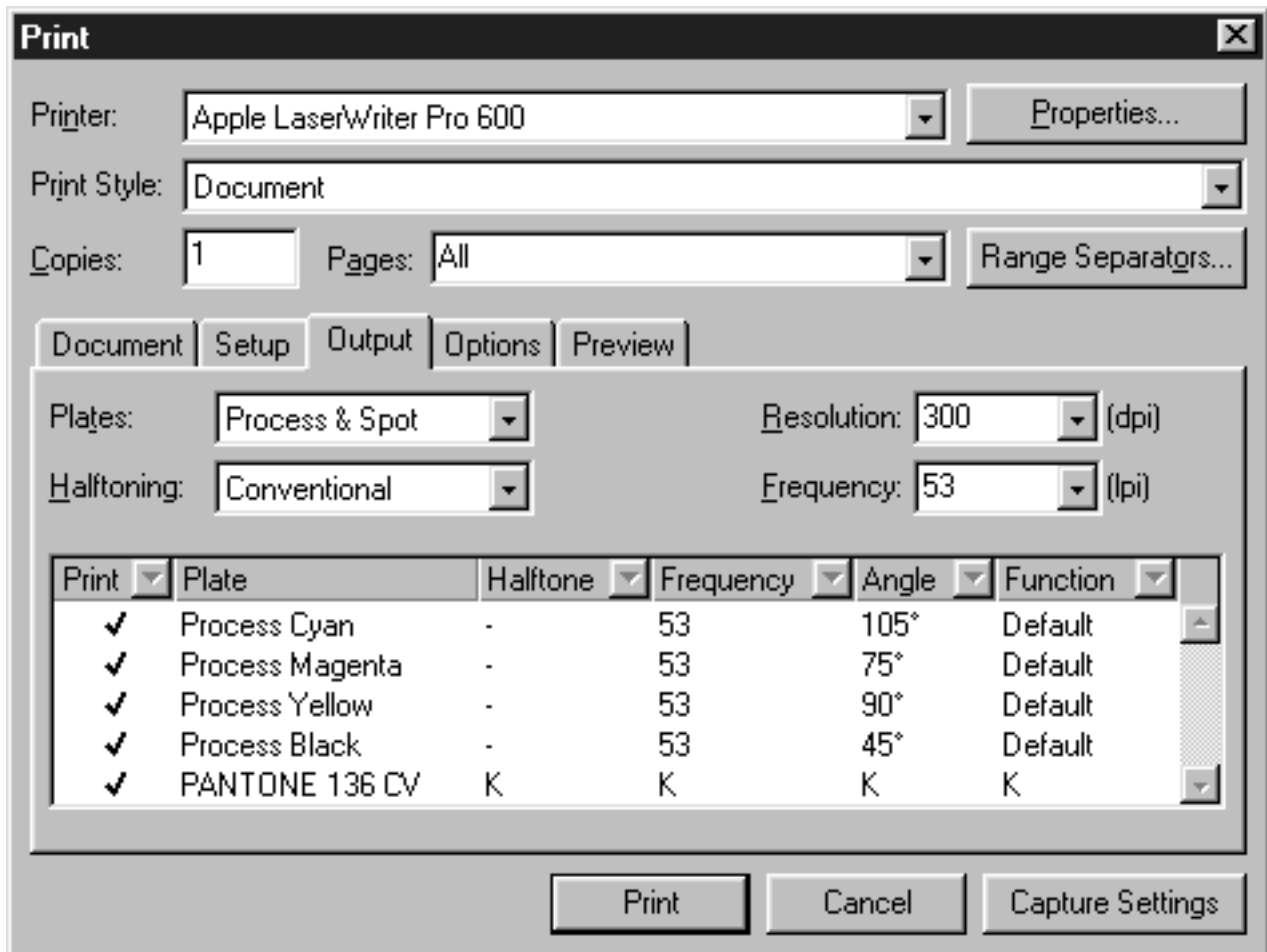
The **Document** tab lets you specify whether you want separations, registration marks, and entire spreads printed.

- 5** Set up your printer and reduce the document's size: Click the **Setup** tab. From the **Printer Description** menu, choose an appropriate option for an available laser printer. (If a LaserWriter is available, select it so you can choose from various paper size options.)

Choose **US Letter** from the **Paper Size** menu.

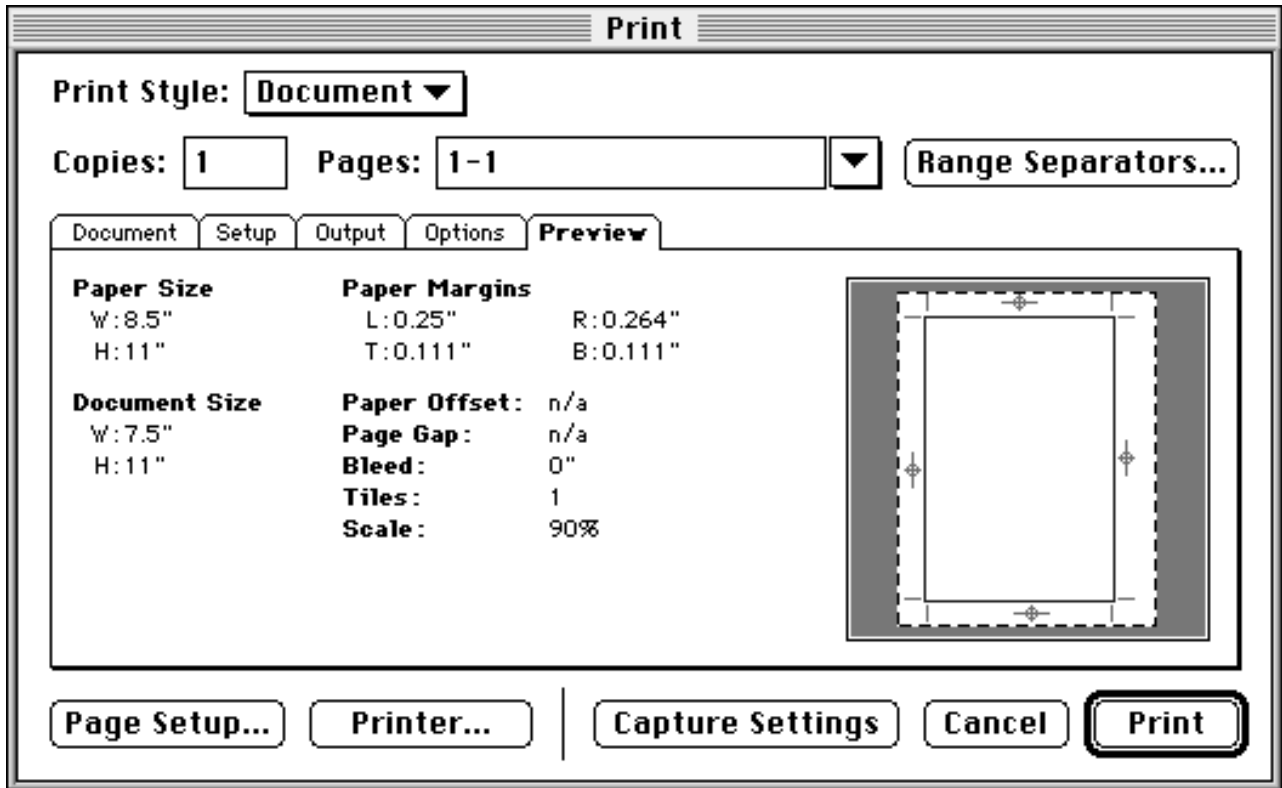
Enter 90 in the **Reduce or Enlarge** field.

- 6** Specify to print separations of the first page: At the top of the **Print** dialog box, enter +1 in the **Pages** field. Click the **Output** tab and make sure all the plates are checked to print.



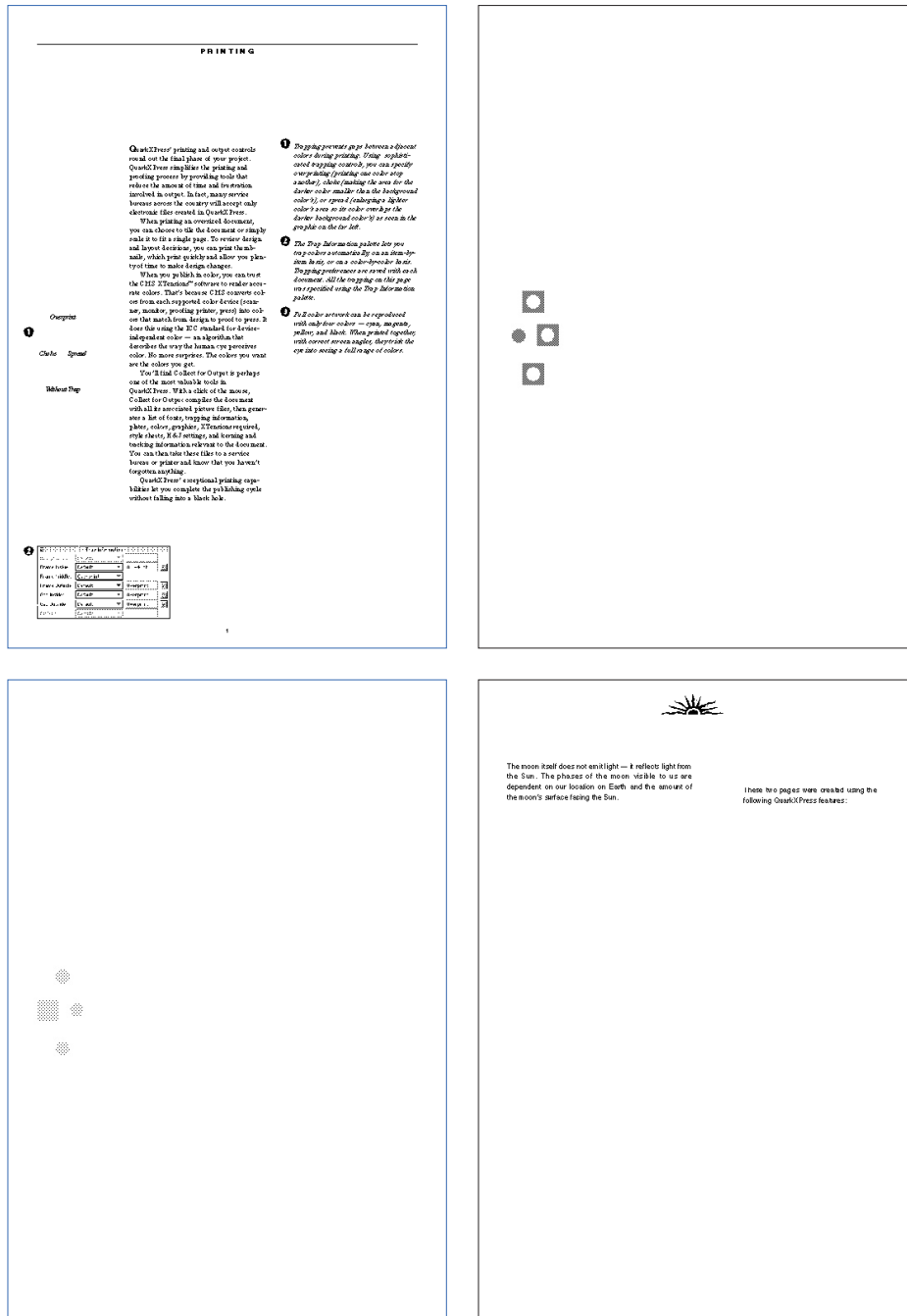
When **Process & Spot** is selected from the **Plates** menu, all the plates are checked to print by default. You can uncheck individual plates to prevent them from printing.

- 7** **Preview the print job and print the separation plates:** Click the **Preview** tab to see how the page fits on the paper, then click **Print**. If the **Missing/Modified Pictures** dialog box displays, click **OK**. If a printer is not available, click **Capture Settings** to save these print specifications with the document.



The document size was reduced to 90% so the registration marks would fit on US letter-sized paper.

8 **Proof the separation plates:** Look at the text above the registration marks to identify the cyan, yellow, black, and spot color plates. Notice there's no magenta plate even though it was checked to print — as it turns out, nothing on the page included magenta ink.



When **Registration** is on, QuarkXPress labels each plate with the name of the appropriate ink color. Clockwise from the upper left is the black, cyan, yellow, and Pantone 136 CV plates.



What are separations? Separations are plates (or pages of paper or film used to make printing plates) that contain each process or spot color used in your document. When commercially printed, process color documents traditionally use cyan, magenta, yellow, and black (CMYK) colored inks, as well as any added spot color inks. If you're printing separations for a one-page document that contains two spot colors and a process color photograph, six plates are produced — one each for the CMYK inks, and one each for the two spot color inks.



Registration marks ⊕: Registration marks are reference symbols on printed pages used to align overlaying plates. After you print separations you can stack the plates and, using a light table or some other bright backlit source, check that the images on each plate align when the registration marks are in position.



Troubleshooting with separation plates: Use the separation plates to troubleshoot any ink color, trapping, and registration inconsistencies that may exist in a finished document. For example, you may have imported a graphic containing a hidden spot color — suddenly you have an extra plate. If your commercial printer is expecting to print with a certain number of ink colors, you should have one plate to match each color of ink. Printing additional colors costs money, so it pays to print preliminary laser separations and catch any stray separation plates before you pay for expensive film output and commercial printing.

Printing Composites

You can print to a black-and-white device to obtain a grayscale representation of the colors in your document or print to a color printer to create a color composite. In this task you'll print to a color printer if one is available.



Keyboard Commands for Mac OS:

Print⌘+P



Keyboard Commands for Windows:

Print CTRL+P

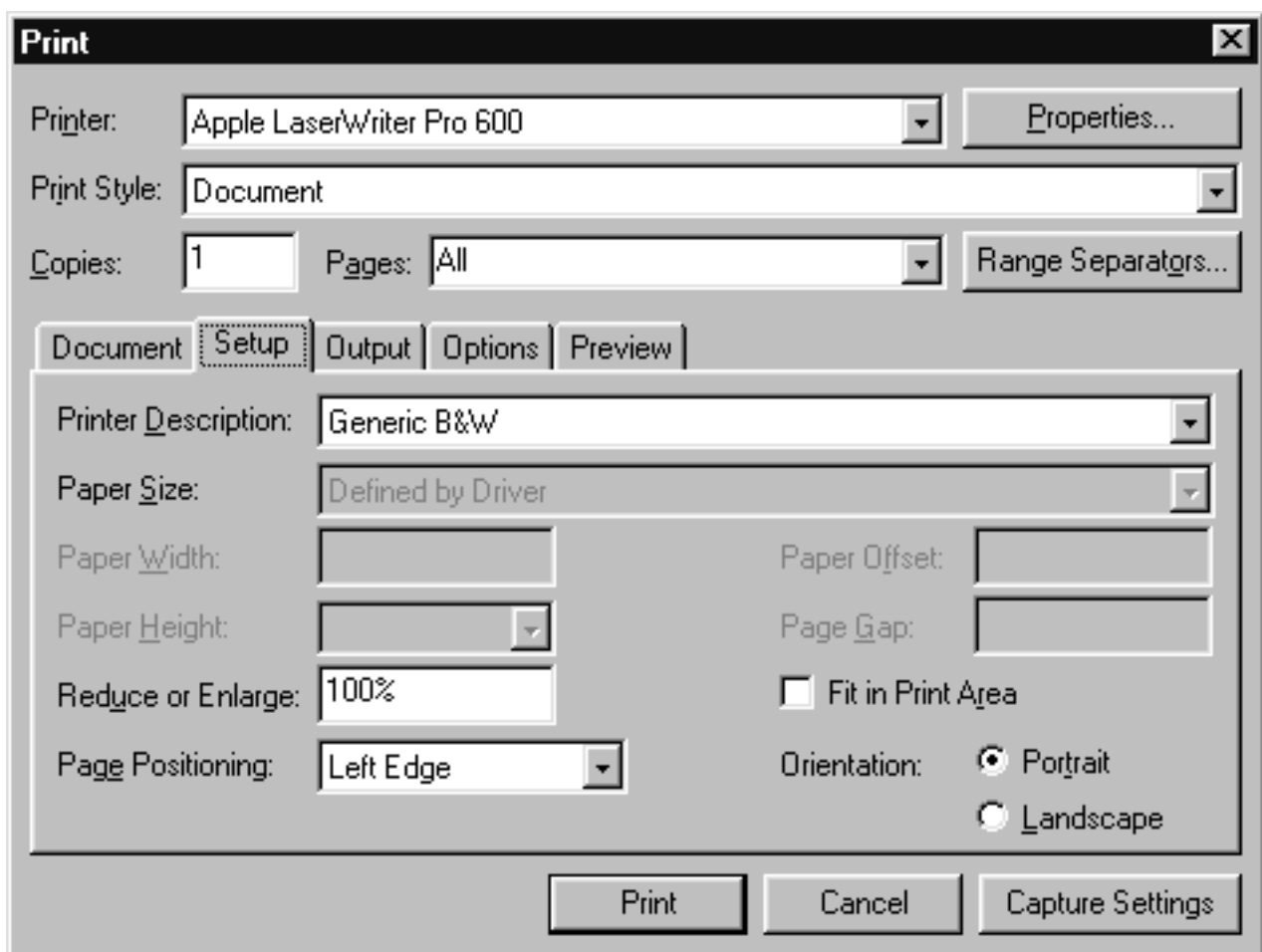
1 **Select a color printer:** On Mac OS, choose a color printer from the Chooser (**Apple** menu). On Windows, either set the color printer as your default printer or select it in the **Print** dialog box (**File** menu). If a color printer is not available, choose a black-and-white device.

2 Tell QuarkXPress to print a composite: In QuarkXPress, choose **File** → **Print**. Click the **Document** tab. Uncheck **Separations** and choose **Off** from the **Registration** menu.

Click the **Setup** tab. From the **Printer Description** menu, choose an appropriate printer description file for the available printer. Choose **US Letter** from the **Paper Size** menu.

!!! Printer description files for specific printers are available from the printer manufacturer. If no appropriate printer description file is available from the menu, contact the printer manufacturer or refer to the software that was shipped with your printer.

Enter 100 in the **Reduce or Enlarge** field.



Choose a **Printer Description** that matches an available printer.

Click the **Preview** tab and notice how the page is positioned.

Click the **Setup** tab, then choose **Center Horizontal** from the **Page Positioning** menu. Click the **Preview** tab again to see the change.

3 **Print page 2 of the spread:** Enter +2 in the **Pages** field at the top of the dialog box, then click **Print**. If a printer is not available, click **Capture Settings** to save these print specifications with the document.



What is a color composite? A color composite is a hard copy that represents the ink colors in your document using a limited set of colors. For example, if you print a document containing five custom spot color inks to a color printer, the printer produces a color composite of your custom inks using cyan, magenta, yellow, and black.



Collecting Files for Output

After you’ve verified the separations and composites, and confirmed other document settings, you can prepare your document for a service bureau or output provider. The service bureau needs the document file, any graphic files, custom fonts, and a report that gives vital information such as trapping statistics, fonts used, and color plates. In this task you’ll collect the files for output.



Keyboard Commands for Mac OS:

Usage F13



Keyboard Commands for Windows:

Usage F2

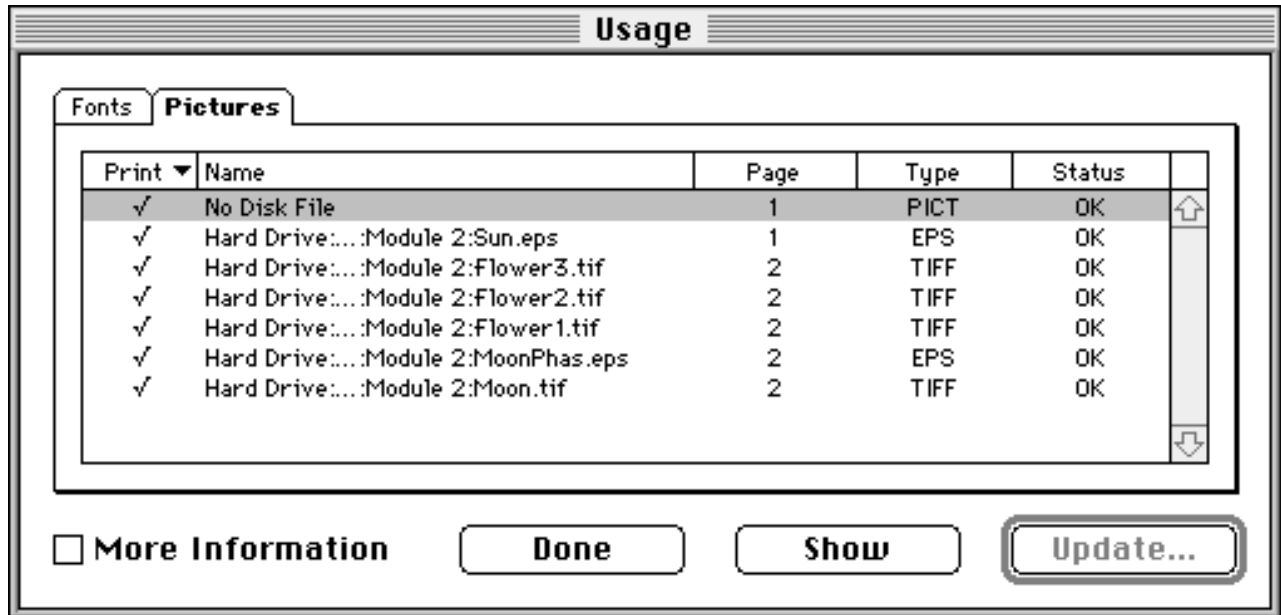
- 1

Verify the fonts used in your document: Choose **Utilities** → **Usage**. Click the **Fonts** tab. On Mac OS, make sure you’re using only **Helvetica** (plain and bold) and **Times** (plain and italic). On Windows, make sure you’re using only **Arial** (plain and bold) and **Times New Roman** (plain and italic).

- 2** **Verify the picture files used in your document:** Click the **Pictures** tab. Make sure the **Status** column lists all the pictures as **OK**.

!!! For a full description of a picture file, including its location, select a file and check **More Information**.

Click **Done**.



All the pictures should have the **Status** of **OK**.

- 3** **Collect the file for output:** Choose **File** → **Collect for Output**.

!!! If you didn't save after printing separations, a dialog box asks you to save now. Click **Yes**.

Open your "Student Files" folder and create a new folder with the descriptive name "MoonPrint."

Leave the default file name in the **Report Name** field.

Click **Collect**. Copies of all the graphic files, the document, and a detailed report are placed in the folder.



What do service bureaus do? In general, service bureaus provide output from high-quality, digital-publishing equipment such as imagesetters and scanners — equipment that is often too expensive for other businesses to own and maintain independently. Service bureaus employ digital-publishing specialists who transfer your QuarkXPress files to different formats for commercial printing. Among constantly-evolving digital-publishing services, service bureaus have four main functions: They make film or RC (resin-coated) paper output from your electronic files to send to a commercial printer, they make color proofs to give you an idea how your document will look when commercially printed, they print copies of large format documents such as posters, and they scan images.



Font availability: Double-check with the service bureau to make sure they own the exact fonts used in your document. The output report itemizes all fonts used in your document. You can pretty well assume they'll have system fonts (like Helvetica, Times, Arial, and Times New Roman), but if you're using something more obscure, check first so you're prepared before any font problems arise. Verify not only the name, but also the manufacturer and version of the fonts to avoid text reflow in high-resolution output. Fonts are purchased and used under license from the manufacturer — and copying fonts is usually a violation of your license agreement. If your service bureau doesn't own the same fonts used in your document, ask that they purchase them.

Sending Files to a Service Bureau

After you've collected the files for output, you need to fill out a form that describes the files and the output you need, then copy the files to a removable media. In this task you'll complete the Output Request Template included with QuarkXPress.



Keyboard Commands for Mac OS:

Open	.⌘+O
Get Text	.⌘+E
Save as	.⌘+⌥+S
Close	.⌘+W



Keyboard Commands for Windows:

Open	.CTRL+O
Get Text	.CTRL+E
Save as	.CTRL+ALT+S
Close	.CTRL+F4

1 **Verify the collected files:** At the desktop, locate the “MoonPrint” folder  in your “Student Files” folder and check to make sure the graphic files, document, and report are included.

2 **Open the Output Request Template:** Choose **File → Open**. Open the  “Module 2” folder, then open the “Lesson 8” folder. Select “Output Request Template” or “Output.qxt” and click **Open**. A new document based on the template displays.

!!! If the **Nonmatching Preferences** dialog box displays, click **Keep Document Settings**. If the **Missing Fonts** dialog box displays, click **Continue**.

3 **Flow the report text into the template:** Using the Content tool , click  the blank area at the bottom of the form: You'll notice an active text box. Choose **File → Get Text**.

Select the “printing report” in the “MoonPrint” folder.

Check **Include Style Sheets**, then click **Open**.

4 **Review the information in the report:** Look over the report generated by  the **Collect for Output** feature. If you wish, click in the top portion of the

first page and complete any of the Client Information, Delivery Information, etc. Choose **File** → **Save as**, then enter `bureau_report` in the field.

Make sure the **Type** is **Document** and the **Version** is **4.0**, then click **Save**.

Choose **File** → **Close**. You can delete the “printing report” text file now that it’s flowed into a document.

ELECTRONIC OUTPUT REQUEST	
CLIENT INFORMATION Contact Person: Moon, _____ Company: 344 344 344 Address: 2150 East 1st St. _____ City/ST/Zip: 3-4567 01 00000 Phone: (303) 456-7890 Fax: _____	OUTPUT SPECIFICATION ☐ All output All Page ☐ Output the following specified Page(s): From: To:
DELIVERY INFORMATION ☐ Deliver ☐ Hold for Pickup ☐ Call When Complete Delivery Address: same as above City/ST/Zip:	GROUP MARKS ☐ No ☐ Yes RESOLUTION/DPI ☐ 1200x1200 ☐ 600x600 ☐ 300x300
TURNAROUND INFORMATION ☐ Normal ☐ Rush ☐ Emergency	SCREEN RULING/DPI ☐ 6" ☐ 8" ☐ 12"
FONT INFORMATION ☐ Adobe/TypeType ☐ Font Company ☐ Apple/Compuserve ☐ Bitstream ☐ Monotype _____	COLOR SEPARATION PLATES ☐ Cyan ☐ Magenta ☐ Yellow ☐ Black
COPYRIGHT INFORMATION All that appears on the enclosed medium (including, but not limited to, floppy disk medium, transmission, reproduction, and all other means) is hereby granted to the customer, who has full right to reproduce the supplied content. Signature: _____ Date: _____	COLOR PROOF SPECIFICATION ☐ All proof All Page ☐ Proof the following specified Page(s): From: To:
OUTPUT MEDIA (CHECK ALL THAT APPLY) ☐ Film ☐ 35mm Super ☐ Color Proof ☐ Laser Print ☐ Color Slide ☐ 35mm ☐ 4x6 ☐ 5x7 ☐ 35mm Zoom ☐ 4x6 ☐ 5x7	LASER PROOF PROVIDED WITH JOB? ☐ Yes ☐ No OTHER INFORMATION Type information about the job here.
DOCUMENT Source Pathname: Hard Drive 1:Desktop Folder:Lesson 8.1 Destination Pathname: Hard Drive 1:Desktop Folder:MoonPrintMoonPrintReport Last modified: 4:01 PM 4/2/97 Document Size: 112K Most recently saved version: 4.0.0b1 Document has been saved by the following versions of QuarkXPress: 4.0.0b1 4.0.0b1 Total Pages: 2 Page Width: 7.5"	

The text box at the bottom of the Electronic Output Request form is automatic — when you flow in the report text, additional pages are added as necessary to contain the entire report. When **Include Style Sheets** is checked, the XPress Tags filter ensures correct text formatting upon import.

5 **Close and save the original document:** Choose **File** → **Close**. If you haven't recently saved your document, a dialog box asks you to save it. Click **Yes**.

 **Delivering files:** The final step is to copy the entire report folder to removable media — a floppy disk, an external hard drive, a cartridge, or some type of transportable media. Consult your service bureau about the type of removable media you should use. After saving the files to another device, it's always a good idea to test the document's output again.

 **Document information:** The collect for output report contains information valuable to you and your service bureau:

- Document size, pages, width and height
- QuarkXPress version and required XTensions
- Document fonts
- Graphics (path and placement)
- Paragraph and character style sheets
- Colors in document
- Colors used on each page
- Trapping information

 Checkpoint

Confirm your new skills — then try them out. If you have any questions, ask your instructor or consult “The Details” section of this lesson.

How are you doing?

Make sure you can:

- Print and proof preliminary color separations
- Print color and black-and-white composites
- Collect documents for output
- Ready files for a service bureau

On your own

Experiment with this document, new documents, or some of the other lesson files. Try the following:

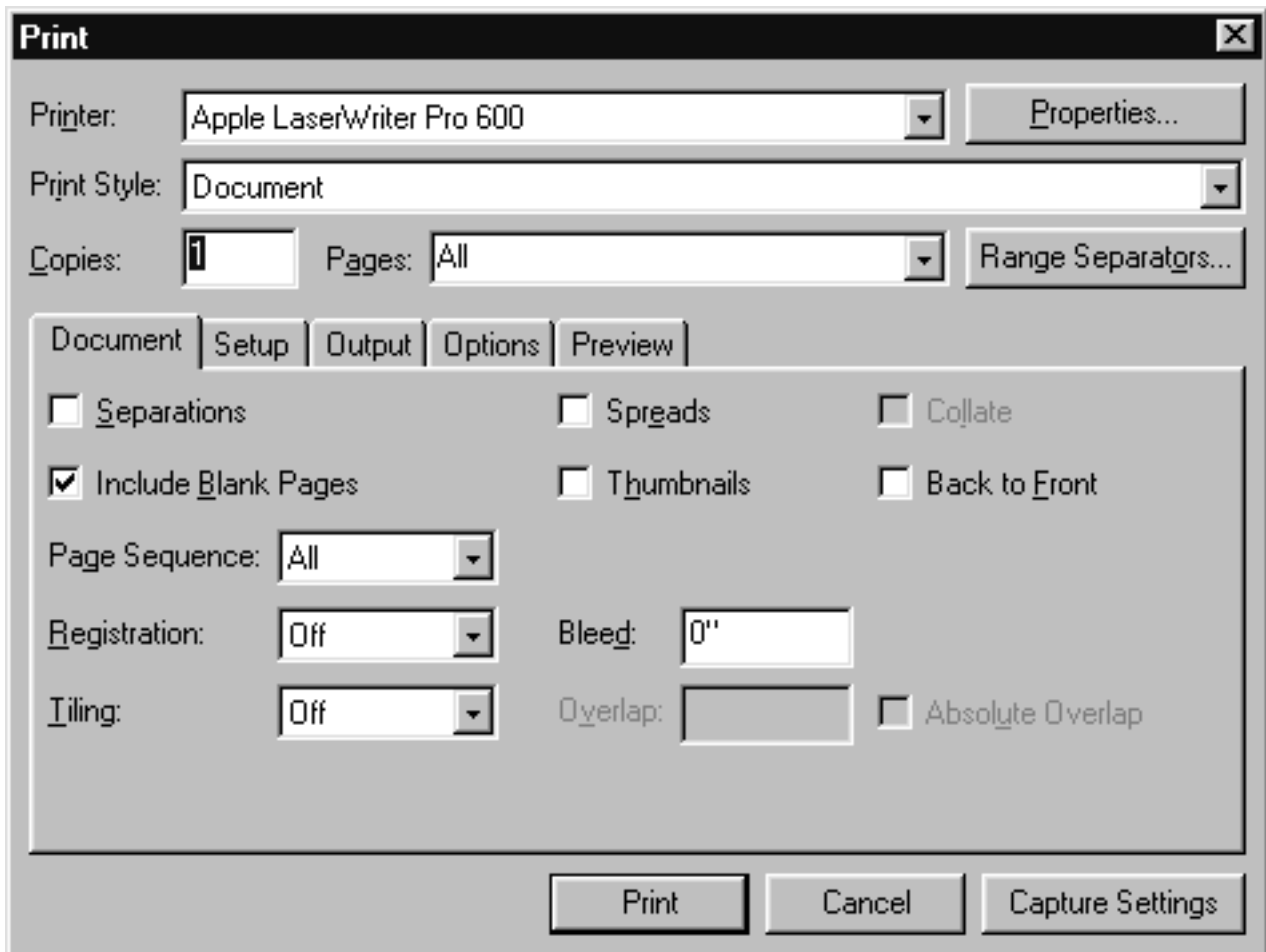
- Collect other documents for output.
- Try checking **Report Only** in the **Collect for Output** dialog box and see what information is gathered.
- Open some of the other documents and look at the **Usage** dialog box to see what components they’d need to print.



The lesson files are all templates, which means you can open copies of them without affecting the original files.

The Print Dialog Box

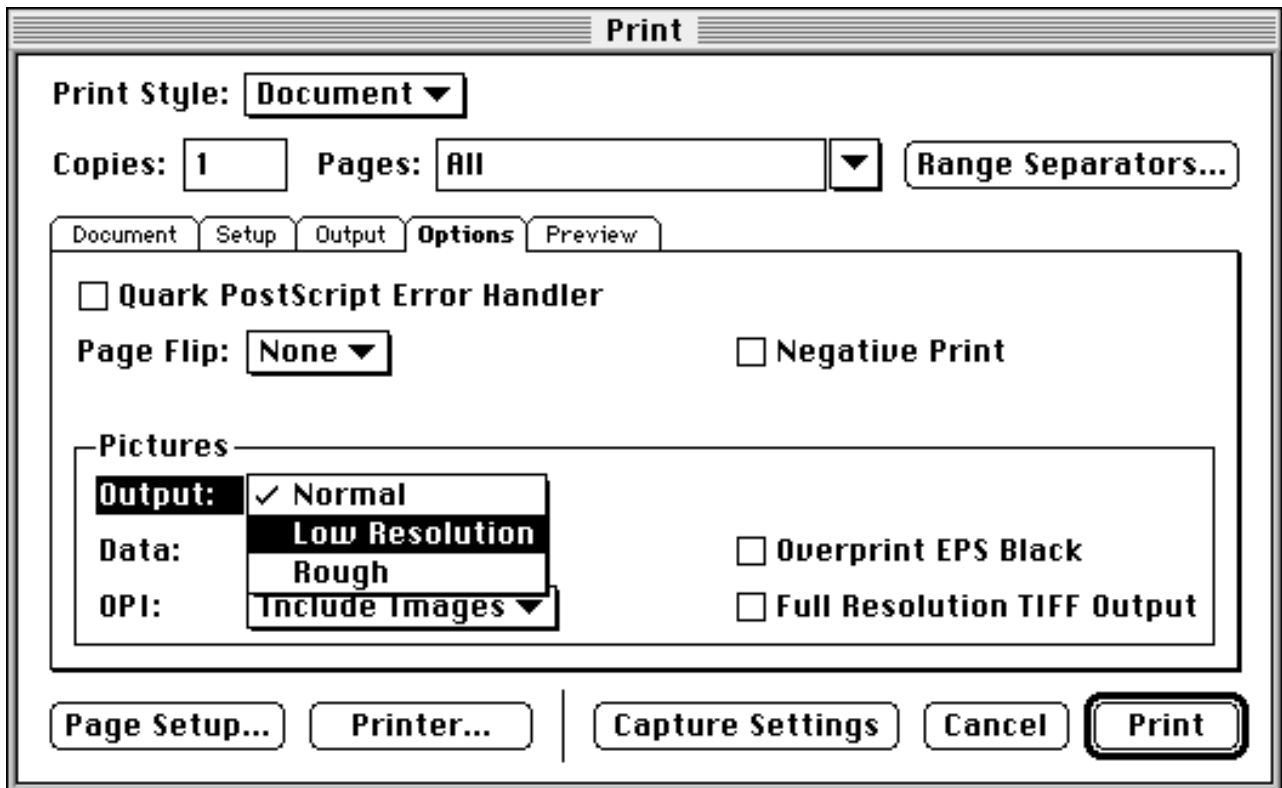
All printing specifications in QuarkXPress are consolidated in the **Print** dialog box. The upper portion of the dialog box provides general print options, while the five tabs in the lower portion each provide a unique set of print-related options. You can save complex printing specifications as “style sheets” using the **Print Styles** command in the **Edit** menu.



Clicking one of the five tabs in the lower portion of the **Print** dialog box displays a group of related printing controls.

- The **Pages** field lets you specify pages to print (the default is **All**). You can print ranges of pages, discontinuous pages, or a combination of ranges and discontinuous pages for printing. Use commas and hyphens to define a continuous or discontinuous range of pages. For example, to print pages 3 through 9, 12 through 15, and page 19 of a 20 page document, enter 3–9, 12–15, 19 in the **Pages** field.

- The **Document** tab lets you print separations or composites, choose registration alignment, tile documents (to print large documents in sections), print spreads, print thumbnails, and collate multiple copies of documents.
- The **Setup** tab lets you choose a printer description, paper size, paper width and height, page reduction or enlargement, page positioning, and orientation (landscape or portrait). You can also automatically scale the document to the print area by checking **Fit in Print Area**.
- When you're not printing separations, the **Output** tab lets you specify whether to print a document as black-and-white, grayscale, or composite. When you are printing separations, the **Output** tab lets you choose individual plates to print.
- The **Options** tab lets you enable the **Quark PostScript Error Handler**, flip pages, and choose a negative print. Picture controls let you manipulate picture output.



Choosing **Rough** from the **Output** menu in the **Options** tab suppresses the output of all the pictures in a document.

- The **Preview** tab shows statistics and gives a preview of how the document fits on the output media.



Editing range separators: When specifying pages to print, commas and hyphens are the default range separators. If you're using commas or hyphens as part of the document's page numbers, you'll need to change the default separators. Click the **Range Separators** button and enter new characters in the dialog box.



What's a PostScript error? PostScript is a page description language developed by Adobe Systems, Incorporated that describes how an output device draws the text, pictures, and other objects on your page. A PostScript error occurs when an output device doesn't understand or is overwhelmed by the PostScript description of your page. This can be caused by a damaged font, graphic, or page layout element; by choosing the wrong option from the **Printer Description** menu; or by low memory in the printer.



The Quark PostScript Error Handler: The **Quark PostScript Error Handler** lets you know what QuarkXPress is trying to print when a PostScript error occurs. QuarkXPress prints the document until it reaches the damaged item, then prints a page containing a description of the damaged item and its bounding box.

 The Publishing Process

The highly technical and automated nature of today's publishing process requires expertise in software and hardware systems designed specifically for electronic publishing. Many electronic publishing jobs need services supplied by outside vendors: high-resolution scanning, imagesetting, color printing services. You can also obtain specialized graphic design, digital image editing, and separation services if necessary.

Prepress and print services

Electronic prepress and print services generally fall into one of three categories:

- **Output service bureaus:** Provide output and scanning services designed for local "do-it-yourself" designers and publishers.
- **Prepress houses:** Provide the services of traditional prepress houses, but can crossover into or specialize exclusively in electronic publishing. Services provided by prepress houses vary widely, so communicate with your prepress vendors to ensure they meet your needs.
- **Commercial printers:** Provide standard commercial printing services, but today many commercial printers also offer a full-range of electronic prepress services comparable to most prepress houses. Commercial printers that don't provide electronic prepress often work with service providers so electronic documents are properly output to film and prepared for printing.

Step 1: Establishing relationships with your service providers

Your relationship with output services and commercial printers should begin well before your files are ready for an imagesetter. All parties involved with producing the job should know in advance what kind of job it is, how you made it, its complexity, when you want it completed, and how you want it to look when it's done.

If you've never submitted files for film output and never worked with a commercial printer, you'll need to ask questions and learn how output and printing processes work before you complete your job on the desktop. With their help you can avoid costly mistakes while completing your job on time and within budget.

Step 2: Submitting your job for film output

When the design is finished, you'll give the job to a service provider to output it to film. Your service provider can tell you how they want you to submit your job. Here's a list of the most common methods:

- Removable media (various types of disk or cartridge media, and floppy disk)
- Modem
- External hard disk

If you send files electronically, ask your provider how to prepare or compress your files and how to transmit them. After you send your job, fax them a proof of the file and an output request form if required.

Most output services check every file before it's sent to the imagesetter to ensure it's prepared correctly and will image properly. They do this to avoid common output problems, and to identify major ones such as missing graphics files, missing fonts, stray color plates, or damaged files. Major problems should be reported to you before film output.

Step 3: Proofing color jobs

For jobs that include color, commercial printers usually require that you provide and approve proofing materials such as bluelines or a contract proof.

A blueline proof shows

- Correct imposition of your separated film
- All elements in your file output correctly and are present

A contract proof shows

- Correct color matching
- Correct color balance
- Correct color screening (angles and frequency)
- Correct registration
- Correct traps and overprints
- All elements in your file output correctly and are present

Because of their high quality, laminate proofs are commonly used as contract proofs. Discuss with your output service or commercial printer their contract proofing requirements including the cost and availability. After approving blueline and contract proofs, your film is ready for plate making and printing.

Step 4: Imposition and platemaking

After your file is output to film and before printing plates are made, the pages and pieces of your job are arranged into larger flats. Each flat holds pieces printing one color on one form, or press sheet. This procedure is called imposition.

The layout used for your job depends on the size of the paper you'll use, the number of pages, the binding style, and many other factors — including the printer's own preferences. When your commercial printer performs imposition, those considerations are taken into account. If you want your output service to supply film, you must obtain a folding dummy (sample) and an imposition layout from the printer for the film supplier's reference.

Not all imagesetters can produce output large enough to handle an entire imposed flat, so most imposition programs can also output film in sections that can be stripped together manually. QuarkXPress lets you impose your own printer's spreads: two-page units arranged the way they will be placed on a flat.

After stripping and imposition, plates are made. Plates are a sheet of metal usually (especially for longer press runs or highest quality), plastic, or paper from which an image is printed (or transferred, in offset lithography, to blanket and then printed).

Step 5: Printing

Printing presses vary in capacity and performance capabilities. As you plan and design a print job, consider the press you're using. Today, most commercial printing is done using offset lithography.

In lithography and other printing processes, there are two main distinctions among presses: sheet-fed and web. Sheet-fed presses move paper through the press one sheet at a time. Web presses are much faster and use large rolls, or "webs" of paper. Their speed, their ability to perform folding and other finishing operations, and the fact that paper used by web presses is generally less expensive, makes web printing a good choice for large-quantity print runs. Sheet-fed presses, on the other hand, provide more precise control over registration and other tolerances.

Other common printing processes include gravure, which uses metal plates suitable for long-run, high-quality jobs; and flexography, an inexpensive, lower-quality process traditionally used for high-volume jobs with solid colors and loose registration, such as packaging and paperback books.

Step 6: The press check

When your job is ready for conventional offset lithography printing, a press operator mounts plates on the press, loads your paper, and inks the press. Once it starts running, the press operator makes adjustments to the ink and paper systems for proper registration. Your contract proof shows whether color is printing correctly. This adjustment process is called make-ready. After make-ready is complete, you're invited to view and proof a print sample of your job from the press. This formal review and approval process is called a press check and it's customary for most commercial printers.

A press check is an important quality review and approval event. Many designers, commercial printers, and print buyers require formal press checks. The press check for your job needs to be scheduled and confirmed as far in advance as possible. It's your last opportunity to catch errors, and is used by your printer as a formal sign-off of their work. After you review and approve a press proof, your printer accepts it as the model for the rest of the job. If errors can be corrected on press, your printer will correct them and submit another press proof for your sign-off.

Look for the following at a press check

- Is the type sharp?
- Do pictures look correct?
- Are the colors correct?
- Are colors properly registered?
- Are there extraneous marks or white areas on your press proof?

Step 7: Finishing your job

After proper drying time, printed sheets are sent through various binding and finishing operations. For books, magazines, or brochures, press sheets are folded into "signatures," which are collated, bound into books, and trimmed. Jobs without signatures are trimmed, folded, etc., as necessary. Jobs printed on thicker paper stocks must be scored before they're folded. Scoring creates a crease that helps the job fold more easily.

The future of printing

Offset press manufacturers are introducing new technologies. Waterless or dry offset does not use water like traditional offset, providing stronger colors and allowing halftone line screens of 300 lines per inch (lpi) and higher. The newest technology, digital color printing, bypasses film or plates entirely. Two technologies are currently emerging. In one, digital information from a document is converted directly into plates for an ink-based printing device. Another type of digital press images directly from your document using toner-based output technology.