

Typefi Publish

The User's Guide to Typefi Version 5

June 2011



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6.0.1



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Typefi Publish Overview

Typefi® Publish is a platform for professional, design-driven automated publishing, built on industry-standard tools and technologies. It provides a scalable solution for authoring and publishing more efficiently and cost-effectively, without sacrificing design or typographic quality.

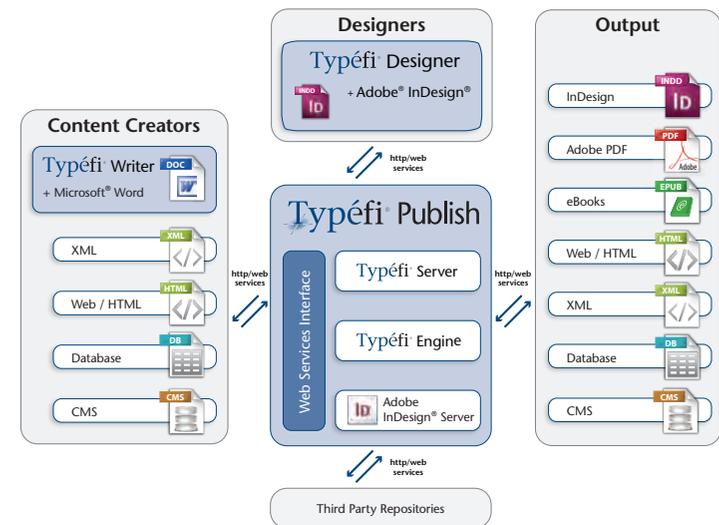
The five key components of Typefi Publish are the Typefi Publish Server, Typefi Engine and Adobe® InDesign® Server, Typefi Designer plug-ins for Adobe InDesign, Typefi Writer add-in for Microsoft® Word and the Typefi FileManager.

Typefi Publish Server

Typefi Publish Server is the web-based interface that makes it easy to set up publishing projects, manage project content and monitor the Typefi Publish composition workflow. Projects and their assets (templates, content, images, job options, jobs) can be defined, accessed or monitored throughout the publishing cycle using Server. Users access documents through a simple check-in and check-out process.

Typefi Engine and Adobe InDesign Server

The **Typefi Engine** is the core component behind Typefi's page composition. The Engine produces richly-formatted InDesign pages using template-driven page composition augmented with layout rules. PDF previews and final edition InDesign documents are generated within Adobe InDesign Server.



Typefi Publish Process Architecture.

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Typefi Designer

Typefi Designer is a set of plug-ins for Adobe InDesign that enable **production designers** to develop intelligent layouts, without sacrificing professional design quality or requiring complex coding. By embedding layout rules and dynamic elements directly into InDesign templates, designs can be rapidly prototyped and adjusted to accommodate highly variable content.

With Typefi Designer installed, production designers can use the Typefi panels (including the Typefi AutoFit tool), preferences, menu and contextual commands to design dynamic InDesign templates.

Typefi Writer

Typefi Writer is an add-in for Microsoft Word that makes it simple to mark up Word documents for use with Typefi Publish. When the Typefi Writer is installed as an add-in for Microsoft Word, a Typefi menu and toolbar are added to the Word interface that provide tools for inserting Typefi markup; viewing document properties; printing full-designed documents to PDF format; and more. Typefi Writer makes it easy for **authors** to create structured, publish-ready content in Word.

Typefi FileManager

The **FileManager** is a small Java-based helper application that handles all file transfers to and from the Typefi Publish Server and enables communication between Typefi Writer and Typefi Publish Server (incl. monitoring Typefi Print job progress).

The FileManager is automatically included with Typefi Writer and Designer client installs and is configured to launch at system startup.

Production designer: term used throughout this User Guide for those working on the production of dynamic InDesign templates developed with Typefi Designer and InDesign tools.

Author: this term is used throughout this User Guide and includes content authors, editors, sub-editors or writers.

What's New

New Features in Version 5

This describes the new features in Typefi Server V5.

- External Database Support
- Run Jobs with Custom XML
- Simplified User Interface for XSL based jobs
- Dynamic Job Log Monitoring
- View Server Log from Browser
- General User Interface Improvements
- WSI – Run jobs without using a defined project

INSTALLATION WARNING

It is highly recommended that you remove your `/context/conf/generated.properties` file prior to installing V5 Server. The uninstaller does not delete this file in order to make upgrades easier. However, upgrading to V5 is a much larger process than typical maintenance releases. If you do not delete this file prior to installing V5, the Typefi Server will automatically update the existing HyperSQL DB database. This may not be what you desire. If instead you use the Migrate tool you can ensure that you create a new copy of your database without affecting your V4 database.

External Database Support

Prior to V5, the Typefi Server only supported the use of an embedded HyperSQL DB database. With this release the Server can now use MySQL and PostgreSQL databases as well as the built-in HyperSQL. Supporting other database servers

Welcome to the Typefi Server

The server must be configured before it can be used.

URL Used to Access this Server	<input type="text" value="http://127.0.0.1:8080"/>
Server Filestore Location	<input type="text" value="/Typefi/Publish/Filestore"/>
XSL Support Files Location	<input type="text" value="/Typefi/Publish/XML"/>
Database Type	<input type="text" value="MySQL"/>
JDBC Host	<input type="text" value="localhost"/>
JDBC Port	<input type="text" value="3306"/>
Database Name	<input type="text" value="tpss"/>
Database User	<input type="text" value="admin"/>
User must have at least ALTER,CREATE,DELETE,DROP,INSERT,SELECT,UPDATE privileges on the specified database.	
Database User Password	<input type="password" value="*****"/>
<input type="button" value="Initialize Server"/>	

The MySQL server configuration dialog.

allows larger installations to better manage their database environments than the built-in HyperSQL database.

The type of database used is configured during Server initialization. A 'migrate' utility is also provided to move existing Typefi Publish installations to an external database.

Configuring MySQL

The database type menu determines which database server to use. The default is Built In (HyperSQL). Selecting MySQL shows the following configuration options.

JDBC Host is the IP address or Hostname of the server where the MySQL server is located.

JDBC Port is the port to connect on. The default is 3306 for MySQL.

Database Name allows you to change the database name used by the Typefi Server to avoid conflicts with other applications.

Database User & Database Password are used to connect to the MySQL server.

The other new field, "XSL Support Files Location", will be described later.

When you click Initialize Server, the connection credentials will be verified and you will be asked to confirm creation of the database and filestore.

The confirmation alert will indicate if the database or file paths do not exist.

Click OK to confirm creation of the database and/or filestore paths.

PostgreSQL Configuration

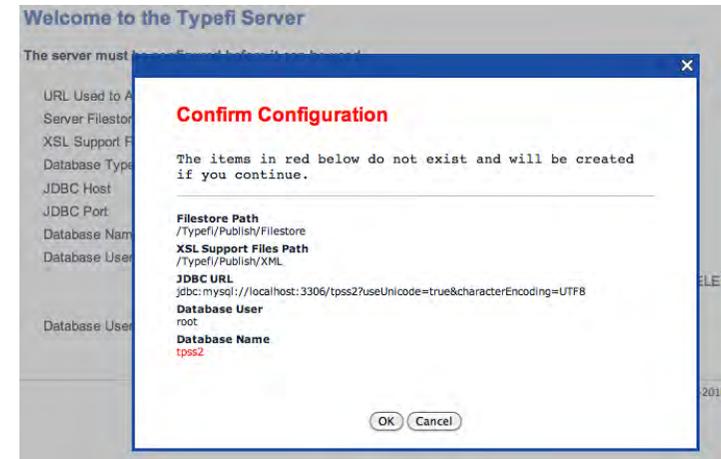
The PostgreSQL configuration page is similar to that for MySQL.

The default port for PostgreSQL is 5432.

As with MySQL, you will be asked to confirm initialization if the database and/or file paths do not exist.

Built-In Database Configuration

Configuring the Built-In HyperSQL database is similar to previous releases.



Confirming the information entered during MySQL configuration



The PostgreSQL configuration dialog

For V5, the default storage location for the filestore and database has been changed to use a Typefi folder at the root of your hard drive rather than a directory in the application folder. This avoids permission problems on Windows machines.

Migrating an Existing Database

The database schema has changed for V5. A migrate utility is provided as part of the Typefi Publish Server install that facilitates moving your V3 or V4 database for use with V5.

The migrate utility is run from a command line and must be executed prior to initializing the Server.

USAGE

usage: migrate [-s HSQLDB path] destination-db-options

```
-d,--dir          Target directory to store HSQLDB files.
                  Required if type = hsqldb
-e,--export       Optional. Export only. No import is done
-h,--host         Host where database server is located
                  (ex: localhost).
                  Note that port can be added onto host if
                  necessary. Not used if dbtype = hsqldb
-n,--dbname       Optional. Destination database name
                  (default: tpss). Not used if
                  dbtype = hsqldb
-p,--password     Database user password.
                  Not used if dbtype = hsqldb
-s,--srcdb        Source HSQLDB path
-t,--dbtype       Database type. One of:
                  [postgresql | mysql | hsqldb]
-u,--user         Database user name.
                  Not used if dbtype = hsqldb
-w,--workdir      Optional. Where to store SQL files.
                  (default: /Typefi//Migrate)
```

This migrates and upgrades data from a V3 or V4 HSQLDB database into a MySQL, PostgreSQL or HyperSQL database.

Examples:

Migrate to a MySQL database on localhost using a user name of 'root'

Welcome to the Typefi Server

The server must be configured before it can be used.

URL Used to Access this Server	<input type="text" value="http://127.0.0.1:8080"/>
Server Filestore Location	<input type="text" value="/Typefi/Publish/Filestore"/>
XSL Support Files Location	<input type="text" value="/Typefi/Publish/XML"/>
Database Type	<input type="text" value="HyperSQL (Built-in)"/>
Server Database Location	<input type="text" value="/Typefi/Publish/Database"/>
<input type="button" value="Initialize Server"/>	

The Built-in HyperSQL configuration dialog

```
migrate -s "/Program Files/Typefi/Publish/Database" -h localhost -t
mysql -u root -p 12345678
```

Migrate to a PostgreSQL database named 'typefi' on localhost using a user name of 'root'.

```
migrate -s "/Program Files/Typefi/Publish/Database" -h localhost -t
postgresql -u root -p 12345678 -n typefi
```

Migrate to HyperSQL with files stored in /Typefi/Publish/Database.

```
migrate -s "/Program Files/Typefi/Publish/Database" -t hsqldb -d "/
Typefi/Publish/Database"
```

The migrate tool will create 4 SQL files in the working directory.

```
TPS-S0-SchemaDDL.sql      -- Schema definition for target database
TPS-S1-CreateSchema.sql   -- Drops existing tables & creates new
tables. No constraints are created at this stage.
TPS-S2-PopulateTables.sql -- INSERT commands to populate tables
TPS-S3-PostImport.sql    -- Applies constraints on tables
```

Additionally there may be ".bin" files created in the working directory. These files contain binary data stored in the ASSET table and are created when migrating to MySQL or PostgreSQL. When migrating to HyperSQL the .bin files are not used as the binary data is stored as hex bytes within the PopulateTables.sql commands.

During the migration the utility will log status messages back to the command prompt. Note that if the migrate fails for any reason, the best thing to do is to use the administration utility that is provided with the database server and drop the database that may have been created.

For example, with MySQL:

```
MyMac:bin $ /usr/local/mysql/bin/mysql -u root -p
Enter password:
Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 1459
Server version: 5.1.51 MySQL Community Server (GPL)
Copyright (c) 2000, 2010, Oracle and/or its affiliates. All rights
reserved.
This software comes with ABSOLUTELY NO WARRANTY. This is free
software,
and you are welcome to modify and redistribute it under the GPL v2
license
```

Type 'help;' or '\h' for help. Type '\c' to clear the current input statement.

```
mysql> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| bug4317           |
| mysql             |
| test              |
| tpss              |
+-----+
5 rows in set (0.00 sec)
mysql> drop database test;
Query OK, 0 rows affected (0.13 sec)
mysql> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| bug4317           |
| mysql             |
| tpss              |
+-----+
4 rows in set (0.00 sec)
mysql> quit
Bye
MyMac:bin $
```

In the event you receive an out of memory error during the migration, drop the target database (if it exists) and edit the 'migrate' (Mac) or 'migrate.bat' (Windows) command file and increase the `-Xmx1024m` value. The default of 1024 MB should accommodate most databases.

Run Jobs with Custom XML

Some sites use custom XSL transformations to paginate XML that does not follow the CXML schema. Prior to V5 this required an extra process be executed before running a job. V5 makes this process easier.

XSL Support Files

During Server initialization you specify a location to store XSL Support Files. By default this is /Typefi/Publish/XML.

The Server will create 3 sub-folders within the XML directory: Catalogs, Library, and Transforms.

The Catalogs directory is where XML catalog files are stored. Using XML catalogs is optional, but it can make manipulation of XML files faster and easier. XML Catalogs are generally used to redirect schema URLs to a local file. For example, you may have XML that has a DOCTYPE like: <!DOCTYPE book SYSTEM "book.dtd">. Rather than relying on network access to locate the book DTD you can cache the DTD on the server machine and configure a catalog to redirect the URL to the local cache. For example,

```
<?xml version="1.0" encoding="UTF-8"?>
<catalog xmlns="urn:oasis:names:tc:entity:xmlns:xml:catalog">
  <systemSuffix systemIdSuffix="book.dtd" uri="file:///Typefi/
Publish/XML/Library/nlm2cxml/DTD/book/2.3/book.dtd"/>
  <systemSuffix systemIdSuffix="journalpublishing.dtd" uri="file:///
Typefi/Publish/XML/Library/nlm2cxml/DTD/journalpublishing/2.3/
journalpublishing.dtd"/>
</catalog>
```

Catalog files are described further here: <http://www.oasis-open.org/committees/entity/spec-2001-08-06.html>

The Transforms directory is where you place your XSL transformations.

The Library directory can be used to store files that are shared across multiple XSL transformations.

The Typefi Server has one collection of XSL files but each project can be configured to use a subset of that collection.

Defining XSL Files

XSL files that convert non-Typefi XML into CXML are placed in the Transforms directory.

An XSL file can include other XSL files using the <xsl:include> command. To include a file located in the Library directory use a path like:

```
<xsl:include href="../../Library/allIncludes.xsl"/>
```

Paths in the include statement are relative to the file that contains the include. So, for example, for files in the Transform directory, the paths must be relative to the Transform folder. But files within the Library directory must use a path relative to the Library directory.

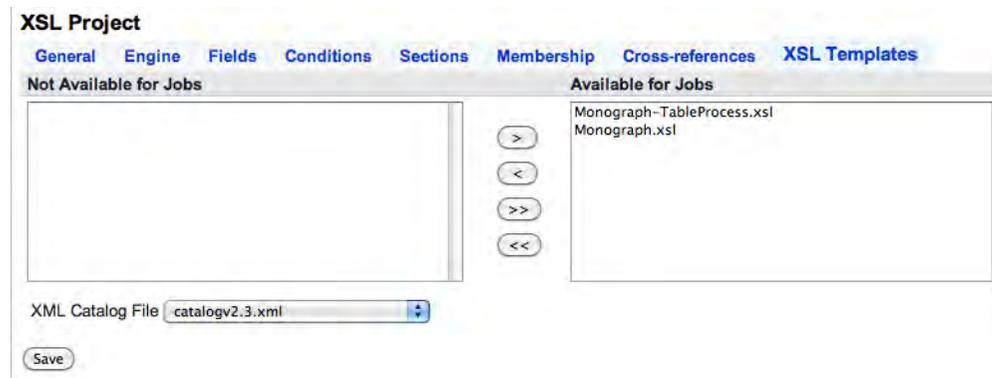
Subfolders can be created within the Library and Transforms directories as desired; however, only XSL files within the Transforms directory are visible to the Server (subfolders are ignored).

Tip

The paths within the Catalog files must, obviously, be valid and point to existing files. If you see errors indicating a DTD or Schema cannot be found, the first place to check is your catalog files.

Configuring a Project

The Project page has been redesigned to isolate separate properties into individual tabs. A new tab, XSL Templates, has been added to support XSL processing. Each project can have its own set of XSL files and a separate XML catalog.



The new XSL Templates configuration tab (only needed by those using an XSL workflow).

XSL files located in the /XML/Transforms folder will be displayed in the "Not Available for Jobs" list. To make them available for this project, click on the desired XSL files and then click the right arrow button.

An XML catalog from the /XML/Catalogs directory can be selected in the XML Catalog File menu.

Running a Job

A new button has been added to the Job Options page that allows an external XML file to be used when running a job.

When “Run Job with XML...” is selected, the user will be able to select an XSL transformation and upload a XML file.

When Run Job is selected the XML file will be uploaded and transformed into CXML using the selected XSL template.

If the Job was configured to Prompt for Job Option Overrides the run page will look like:

XSL Project - Job Options - PDF Document

Override Job Option Parameters

General

Create Adobe PDF -- use engine type default --

InDesign Output Format: Single Document

Start Page Numbering at: 1

Unresolved Cross-references UNRESOLVABLE CROSS-REFERENCE

Process 'Soft Style' Character Formatting

Content

XSL Template: Monograph-TableProcess.xsl

XML File: Choose File No file chosen

Engine Configuration

Max Time Per Page: 30 (seconds)

Max Layouts Per Page

Project Field

Project Field	Value
pub-title	

Condition

Condition	Description
There are no conditions for this project.	

Scripting Options

Override Script Presets

Run Job

The Content area allows the user to select the XSL template and the XML file to use for this job as well as specify any job override settings.

XSL Project - Job Options

New... Edit... Delete Run Jobs Run Job with XML... Monitor Jobs

Name	Date Created
<input checked="" type="checkbox"/> PDF Document	Oct 18, 2010 11:47 AM

You can now run a job with an external XML file.

XSL Project - Job Options - PDF Document

Content

XSL Template: Monograph.xsl

XML File: Choose File 02-Section 1-Final Draft.XML

Run Job

Selecting the XSL template to use with the Job

After choosing to 'prompt for Job Option Overrides', modifications can be made prior to running the Job.

Note that when using the Run Job with XML feature any content defined in the Job Option itself is ignored. The user specified XML provides all the content for the job.

Simplified User Interface for XSL based jobs

Non-Administrator users can be provided with the full Typefi Server user interface or a streamlined version intended to be used primarily for running XSL based jobs.

The User properties page has a new menu, Typefi Console, which is used to select the interface for a given user.

Choosing 'Simplified' will restrict this user to just being able to run jobs using user-supplied XML files.

When a user with a Simplified Typefi Console logs in they will see the following:

The Typefi Project menu will list all the projects this user has been assigned to. The XSL Transform menu displays the list of XSL files available within the selected project. The user provides an XML Content File by filling in the Content File field. The Job Option field is used to determine the job option to use. Note that the "Prompt for Job Option Overrides" setting is ignored in the Simplified Typefi Console.

Edit User

Choosing the type of interface a user will use when working with Typefi Publish

The Simplified Console showing Run Job choices

Job Monitor

When a job is started, the Job Monitor is shown.

Name	Label	Project	Job Option	Wait Time	Start Time	End Time	Duration
<input type="checkbox"/> 20 Oct 2010 13_30_07		IARC - Monograph	PDF Document	1s	1:30:08 PM		22s
<input type="checkbox"/> 20 Oct 2010 13_26_07		IARC - Monograph	PDF Document		1:26:07 PM	1:26:52 PM	45s
<input type="checkbox"/> 20 Oct 2010 13_25_34		IARC - Monograph	PDF Document		1:25:34 PM	1:25:41 PM	7s
<input type="checkbox"/> 19 Oct 2010 17_00_22		IARC - Monograph	PDF Document		5:00:22 PM	5:00:31 PM	9s
<input type="checkbox"/> 17 Oct 2010 17_52_17		IARC - Monograph	PDF Document	1s	5:52:18 PM	5:52:20 PM	2s
<input type="checkbox"/> 17 Oct 2010 17_48_55		IARC - Monograph	PDF Document		5:48:55 PM	5:49:04 PM	9s

Job Monitor as seen in the Simplified Console view

The Job Monitor works similar to the Monitor in the full Console UI with the following differences:

- The user will only see jobs they've started
- Roundtripped jobs are not shown
- Filtering by Job Option and/or Project is not supported

When a job is active, clicking on the job name will display a dynamic event log showing the progress of the pagination process.

Time	Message
i 1:32 PM	Job commenced.
i 1:32 PM	Processing section [1] of [1] [chapter].
i 1:32 PM	Processing page [1:10] [A-Chapter Opener].
i 1:32 PM	Spilling main story chunk [1] of [1], [50] instructions.
i 1:32 PM	Spill main story complete.
i 1:32 PM	Saving document.
i 1:32 PM	Saving PDF.
i 1:32 PM	Releasing document.
i 1:32 PM	Job completed.
i 1:32 PM	1 page composed.

Simplified Console showing Job Monitor

Once a job is finished, clicking the name will display the file contents of the job folder.



Simplified Console view of job folder contents

The simplified UI user does not use the FileManager and cannot check out or check in files. Instead files can be downloaded by clicking on the file icon or name. This will download the file using the normal browser download mechanism.

Note the clicking on the log displays the log events in the browser and does not download the actual file.

Files can be deleted by clicking the checkbox next to the file names and clicking the Delete button.

Dynamic Job Log

New in V5 is the ability to monitor the job log generated by the Typefi Engine during job composition. When a job is running clicking on its folder name will display the job event log. New events will be appended to the bottom of the list.

After a job is finished, successfully or not, clicking on the job name will go to the job folder page.

View Server Log in Browser

A new menu option has been added to the Admin menu bar that allows remote viewing of the Typefi Server log. This view will automatically update as new messages are logged.

The Server Log being dynamically updated

General User Interface Improvements

The general look of the server has been 'lightened'. The dark backgrounds have been removed.

Here are some highlights of the UI changes:

- Login & confirm override pages have been upgraded
- The Project page is now tab-based, making it more obvious what will be saved when clicking the save buttons.

Server WSI

Tab-based interface for the Project page

- The Server initialization page has been upgraded to work with MySQL and PostgreSQL databases. It also confirms creation of new filestore folders and/or databases.
- The Add/Edit User page can now be used to edit the list of projects of a user belongs to.

- Import project automatically fills in the Project Name field based on the name of the TZIP (or ZIP) file.
- In the Project – Condition page, the color swatch has been moved to the left of the condition name.

WSI Changes

New API call: runjob-raw

This call allows jobs to be queued to an engine without having a predefined project. It's intended to be used by sites that maintain their own CMS and are using Typefi Publish for its pagination abilities. The call allows specifying an arbitrary folder containing a template, a content XML file and an output location. The job will appear in the Job Monitor as a System job with no associated project. It uses the same basic API structure as runjob and runjob-cxml.

More details can be found in the WSI documentation.

WSI Updates

The results from the /listproject call now include the XSL template information for a project. Within the XML structure a new 'xsl' element has been added:

```
<xsl>
  <transforms>
    <transform id="123" | name="abc.xsl"/>
  </transforms>
  <catalog name="mycatalog.xml"/>
</xsl>
```

This will list the XSL Transforms assigned to the project as well as the chosen catalog file.

Starting a Project

Typefi projects are all of the components of a publication, from images and content, to template and finished artwork. Typefi projects are defined by the Typefi Publish Server and provide access to related project templates, content, images, job options and jobs.

Server login

Before you can create, edit, import or export projects from the Typefi Publish Server, you must sign in.

Each Server installation comes with a default administrator user account that you can use as a first login option. (The sign in details for this account are: username **'admin'** and password **'admin'**).

Sign in to Server

To sign in to the Server through web browser access:

- Enter the URL for the Typefi Publish Server in your web browser.

For example, <http://typefiserver:8080/> (where 'typefiserver' is the name of your server).

The sign in screen appears.

Recommendation: change the default admin password after first login to prevent unauthorized administrator access.



- Enter your Username and Password
- Click **Sign in**.

Upon successful sign-in you'll see a list of available Typéfi projects.

Sign out of Server

When you've completed your work in a Project, we recommend that you save the files and check in the files you've recently worked on prior to signing out of the Server (see also [Check in / Check out](#), p. 29).

- To sign out, click **Sign out** link in the top right corner of the screen.

The Typéfi Publish Server returns to the Sign-in screen.

User accounts

Creating, editing and deleting users can be done only by a user with administrator-level access to Typéfi Publish Server.

To add a new user to the system:

- Navigate to the **Admin** tab.
- Next click **User Management**.
- Click the **Add User...** button.
- Enter the Name, Username and Password and set the privileges for the user.

Typéfi Publish Server login from browser



Sign out link in Typéfi Publish Server.

Non-administrator Users only see a Job Monitor tab not the Admin tab.

User Management

Add User... Delete Enable Disable

<input type="checkbox"/> Name	Username	Console	Administrator	Enabled
<input type="checkbox"/> Administrator	admin	Full	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Editor	editor	Simplified	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Mark Linton-Smith	Mark	Full	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add a new User to the Typefi Publish System

Username is the name the user enters when logging into the Typefi Publish Server, whereas Name is simply for display purposes.

Administrator privileges will give a user access to all projects.

Enabled allows an administrator to temporarily and globally disable a user's access without actually removing the user from the Server.

Typefi Console offers the choice of two options: Full, and Simplified. The Simplified Console reduces choices considerably.

- Click **Save** to add the new user.

Typefi Publish v5.0

Admin Projects Administrator Sign out

Job Monitor
 System Properties
 Script Properties
 User Management
 Engine Management
 License Management
 Server Log

Add User

Name: Mark Linton-Smith
 Username: mark
 Password: ●●●●●●●●
 Administrator:
 Enabled:
 Typefi Console: Full

Projects: [Empty list]
 Member of these Projects: [Empty list]

Save

Typefi Server - © 2004-2010 Typefi Systems Pty Ltd - Version 5.0.0 (156)

New Administrator user with Full Console access. Account is enabled.

Administrator users are automatically granted access to every project on a Typefi Publish Server. Non-admin users will need to be explicitly added to each project (see [Edit membership list](#), p. 23).

Projects

Only Administrative users can create new projects on a Typefi Publish Server.

As some settings are dependent upon the templates and content in the project, they may need to be set or revised as the project progresses.

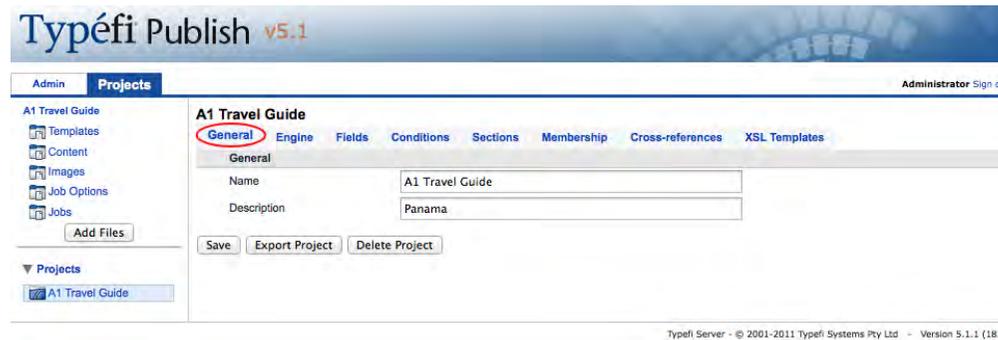
To create a new project:

- Navigate to the **Project** tab.
- Click **New...**

The Create Project window appears.

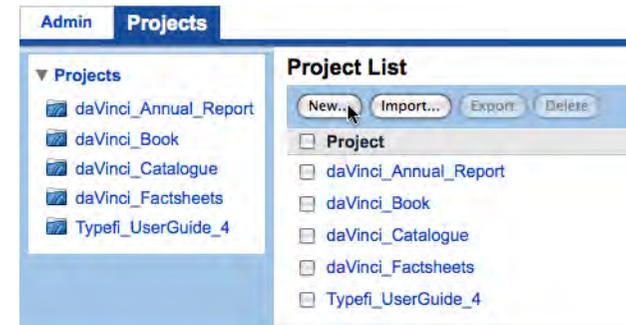
- Enter the project's **Name** and **Description** (optional).
- Click **Create**.

A new project is created and the Project Settings window displays:



A Project's settings determine which users have access (Membership), what content is automatically tracked for cross-references within Writer (Cross-references), and various other options related to configuring default Project Field values, defining project Conditions, and selecting display name fields for Sections. In addition, entire projects may be exported to a TZIP archive.

Cross-references configuration



Starting a project

The Project Settings.

Note: A non-administrator user who selects Projects sees only the 'Export' and 'Monitor Jobs' buttons in the header of the Project Settings window.

Click the Cross-references Link to open the Cross-references window

The Cross-references link brings up a screen in which you can determine the availability of Cross-reference sources (Allow as Source) for Typefi Writer (see [Cross-References](#) in the Typefi Writer User Guide), eliminating the need to manually insert a Cross-reference destination marker (or bookmark) for these sources. The choices you make limit the possible sources for cross-referencing, so the authors only see the styles and fields that are needed for cross-references.

When a production designer is still working on an InDesign template, the options available within the Cross-references section may be incomplete. After the template has been finalized and checked into the Server, revisit Cross-references.

Project Fields

'Project Fields' allow a consistent item of text throughout a project and are Allow(ed) as Source cross-references by default.



To enable Project Field usage as a Cross-reference source:

- Check the **Allow as Source** option for a Project Field.
- Click **Select All** to allow all Project Fields to be used.

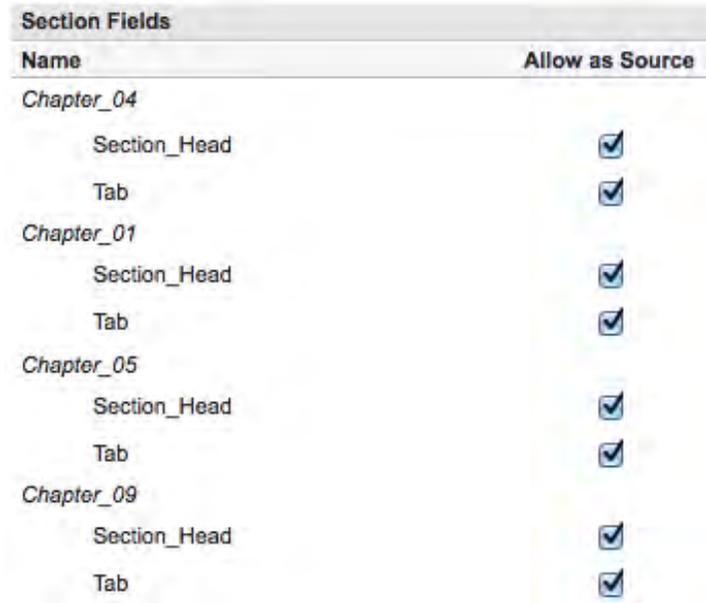
To disable Project Field usage as a Cross-reference source:

- Uncheck the **Allow as Source** option for a Project Field, to enable its use as a Cross-reference source.
- Click **Deselect All** to disable usage of any Project Field.

Section Fields

Section Fields, such as a Chapter Title, are unique to each section in which they exist. By default each Section Field has been enabled as a Cross-reference source.

Cross-references are textual references within a publication that direct the reader from a source point in the text to a destination located elsewhere in the same publication.



Section Fields may also be selected as required to be used as cross-reference sources.

To enable Section Field usage as a Cross-reference source:

- Check the **Allow as Source** option for a Section Field.
- Click **Select All** to allow all Section Fields to be used.

To disable Section Field usage as a Cross-reference source:

- Uncheck the **Allow as Source** option for a Section Field, to enable its use as a Cross-reference source.
- Click **Deselect All** to disable usage of any Section Field.

Paragraph Styles

Paragraph Styles are used to apply text formatting to paragraphed text. A Typefi project may contain many Paragraph Styles and each of these styles may be used as a Cross-reference source. The list of available Paragraph Styles contains each paragraph style made available to the Typefi Writer from the InDesign template.

By default no Paragraph Styles are enabled as a Cross-reference source.



Paragraph style listings.

To include a Paragraph Style as a possible Cross-reference Source:

- Select one or more Paragraph Styles from the **Not Allowed as Source** list.
- Click the right-pointing arrow .

Or

- Click the right pointing double arrow , to include all Paragraph Styles.

To exclude a Paragraph Style as a Cross-reference Source:

- Select one or more Paragraph Styles from the *Allowed as Source* list.
- Click the left pointing arrow .

Or

- Click the left pointing double arrow , to exclude all Paragraph Styles.

Saving Cross-references settings

To save the changes made to the Cross-references Settings:

- Click **Save**.

General

The General section contains the Typefi Project name and description.

To edit the name of a Typefi Project:

- First ensure all files belonging to the project are checked into the system and no one is accessing files from the project.
- Edit the name.
- Click **Save**.

If there are files checked-out of the project, the Typefi Publish Server displays a warning 'There are assets currently checked out. Users will receive errors when attempting to check those assets in. Do you want to rename the project anyway?'

- Click **Cancel** to allow all users to check their files in prior to changing the Project Name and return to the Project Settings.
- Click **OK** to ignore this warning and edit the Project Name. Note that in this case any checked-out files will not be able to be checked back in to the Project after the name change.

To edit or add a Project Description:

- Edit or Enter the description text.
- Click **Save**.

Deleting projects

Only Administrators can delete projects from the Typefi Publish Server. Removing a project deletes a project and all its related files, such as templates, content files, images and published jobs, from the project window and Server. (However, it does

To select a range of consecutive style names click the first style, then Shift+click the last style name. To select non-consecutive multiple styles, Cmd+click (Mac) or Ctrl+click (PC) each style name.

Note: Renaming a project results in renaming of the directories in the Typefi Filestore on the Server.

not remove any files you have checked out to your computer, or Word files not checked into the server.)

- Click a project name in the Project lists.
- This displays the Project Settings window.
- Click **Delete**.

Alternatively:

- Click the **Projects** tab to display a complete list of projects.
- Check the projects you'd like to delete.
- Click **Delete**.

Remove all projects

To delete all projects from the Typefi Publish Server:

- Click the **Projects** tab to display a complete list of projects.
- Check Projects to select all projects in the project list.
- Click **Delete**.

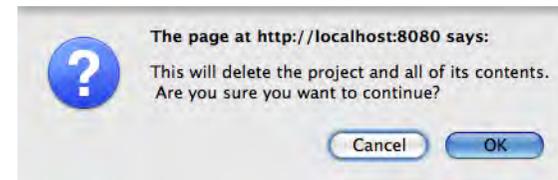
A warning dialog box appears:

- Click **OK** to delete the project and all its related files from the Typefi Publish Server.
- Click **Cancel** if you decide not to proceed.

Edit membership list

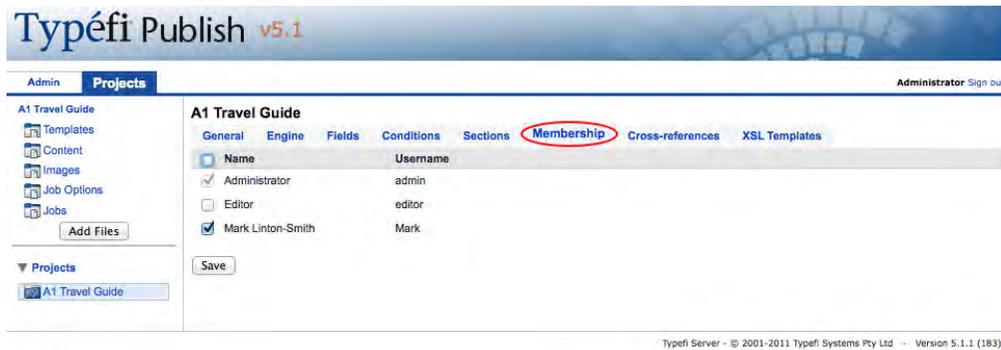
While Admin users are automatically made members of every project on a Typefi Publish Server, non-Admin users must be explicitly added to a Project's Membership List.

Select the 'Membership' link and place a check beside each user to grant full read-write access to a project, its templates, content, images and jobs.



Warning dialog box

Note: it is not possible to remove an Admin user from a project's Membership List.



Editing a project's Membership List.

Engine selection

Installation of Typefi Publish installs at least one Engine called Sample Engine that is a Generic Engine Type. The Generic Engine Type is capable of handling all composition jobs and is configured with the default PDF Export presets as defined by Adobe InDesign.

PDF Export Presets are the Engine Type's reference to PDF Settings files (.joboptions) installed on InDesign Server. Engine-assigned presets are available for selection when running jobs either from the Typefi Publish Server (see also [Running a Job with Full Console access](#), p. 43) or from the Typefi Writer in Word.

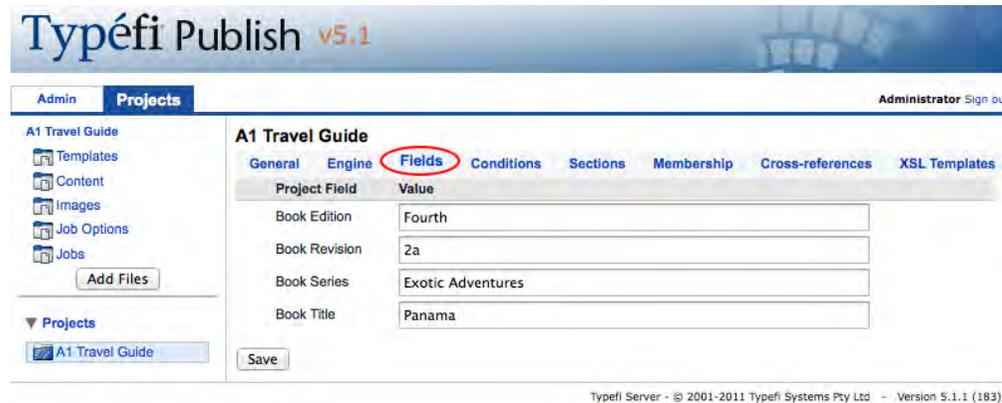
Project Field

A Project Field is a field for which the value is consistent throughout the project, print job or run job (see also [Job Options with 'Full Console' access](#), p. 35). Project Fields, for example, are used to enter a publication title, author name, ISBN, part title or part number, publication date, etcetera.

Once a production designer has added Project Fields to the InDesign template (using Typefi Designer) and the template has been checked back into the Server, then Project Fields become available in the Typefi Publish Server.

Edit Project Fields

A Project Field Value is the text that populates a Project Field (See also [Project Fields](#), p. 20) that is created in the InDesign document during page composition. This text is requested at Project level or when the author runs the Print Typefi Document command from within Word.



Entering Project Field Values.

To edit an existing Project Field value or create a new value at Project level:

- Click a Project Name on the Typefi Publish Server.
- Click the *Fields* heading.

The Project Fields window is displayed for the current project.

- Type in the values for each of the project fields.
- Click *Save*.

The Project Field Values are now locked in, unless they are edited at a later date. (Project Field Values appear as the default in Typefi Word documents, where different values may be entered if needed.)

Conditions

Conditions are qualifications used to mark up specific parts of content for inclusion or exclusion when a job is published. Conditions provide the author with the ability to write a single Word document that could generate different output, based on which conditionalized content is to be included and which isn't.

cent~~CONDITION:US_CA-Text~~<re-CONDITION:UK_AU-Text<en> of the universe¶

Example of Word text marked-up with both US and UK English language conditions.

Conditionalized output is controlled through Job Options (see also [Job Options with 'Full Console' access](#), p. 35).

Let's take this User Guide for example. The guide is published in UK and US English versions. Rather than writing two separate documents, language-specific text is marked up with either a "UK English" or "US English" condition. The document is then output twice, once with the UK English condition enabled, and once with the US English condition enabled, resulting in two different publications. Another example of use of conditionalized content would be the publication of Student and Teacher editions of a text book.

Only conditions that are inserted as part of the Project options are accessible to content authors in the Typefi Writer.

For the daVinci project we included the following two conditions:

- Student note
- Teacher note

New condition

To create a New Condition:

- Click on the Conditions heading in the main Project window.
- Click the **New** button in the Condition Settings.

The Create Condition dialog is displayed.

- Enter the name of the new condition.

The condition Name is also the name that displays in the Typefi > Insert > Condition, Insert Condition dialog in Word.

- Enter a **Description**. The description is useful, but optional.
- Click the **Writer Display Color** icon to choose the display color used by the Typefi Writer for content marked up with this condition.
- Click **Create**.

The new condition has now been added and is ready for use by the Typefi Writer, as soon as the document has been refreshed or is checked out again.

You are currently reading the US English version. (This note changes to the relevant version of English).

Condition	Description	Color	New	Delete
Student Note	Content specific to student edition	Yellow		

New Condition.

Create Condition

Name:

Description:

Writer Display Color:

Create Condition window.

Edit condition

Conditions may be edited later. **Keep in mind that a change in the Condition Name requires an update of all content files in which it has been used.** Editing the Condition Description or Writer Display Color has no adverse impact on the Word content file. When the author checks out the Word document after the conditions have been edited, the condition colors and description details are automatically updated (see [Check in / Check out](#), p. 29). Additionally updating a Word document that's already checked out will refresh the condition appearances (see [Content / Sections](#), p. 34).

To edit a Condition:

- Click the Condition heading.

The Conditions window is displayed:

Condition	Description
<input type="checkbox"/> Student Note	Content specific to student edition
<input type="checkbox"/> Teacher Notes	Content marked up for Teacher edition only

- Make the appropriate changes to **Name**, **Description** or **Writer Display Color**.
- Click **Save**.

Delete condition

To remove a condition:

- Check the box preceding the Condition Name.
- Click **Delete**.

To remove all conditions:

- Check the box preceding 'Condition' (at the top of the conditions).
- Click **Delete**.

Section

A Section Title Field defines how content files are displayed in the Content > Sections list (see also [Content / Sections](#), p. 34) and Job Option configuration (see also [Job Options with 'Full Console' access](#), p. 35). Sections themselves are defined by the Typefi Designer in InDesign (see [Typefi Sections](#) in the Typefi

Edit Condition

Name: Student notes

Description: Content specific to student edition

Writer Display Color: Yellow

Save

Editing Condition settings.

Section	Title Field
Appendix	ChapterTitle
Chapter All Others	ChapterTitle
Chapter First	ChapterTitle

Sections

Check In Undo Check Out Delete

Name

Front

Contents

Chapter First: Leonardo da Vinci

Chapter All Others: Biography

Section Title Sample

Publish Designer Guide). They provide instructions that control the order in which the Typefi Engine applies Master Pages during page composition.

Text-based Section Fields used by a Typefi Section are selectable as Title Fields for the section (see [Typefi Sections](#) in the Typefi Publish Designer Guide).

As sections are extracted from Documents they populate the Sections content list (see [Content / Sections](#), p. 34), and are displayed as: "Section: Title Field".

For instance, let's assume the author has inserted a new Chapter section in the Word document using Typefi Writer. As the section is inserted, the author is prompted to enter the ChapterTitle (e.g. 'Biography'). When this section is uploaded from the Word file into Documents (see [Content / Documents](#), p. 34), and its Section content extracted, the Biography chapter (see [Content / Sections](#), p. 34) will list it as "Chapter: Biography".

To edit the Section Field values that are displayed in Content > Sections:

- Choose an available **Title Field** from the drop-down list next to the Section Name.
- Click **Save**.

Section Fields containing the word 'Title' are automatically considered as Title Fields.

Project Folders

A Typefi project is contained in five directories: Templates, Content, Images, Job Options and Jobs.

Check in / Check out

Typefi Publish Server works with a simple check in and check out process for users who are editing the files that are part of a project.

Prior to editing a file, the file must be checked out of the system. This pushes a copy of the file from the server to your local machine and limits access to the file on the server by other users to 'Read Only'.

Files that are part of a project on the Typefi Publish Server can be in two different states:

- Checked-in and readily accessible to any member of the project.
- Checked-out and only accessible to the member of the project that has the file checked out.

Colored symbols preceding the file names indicate the current state of the file.

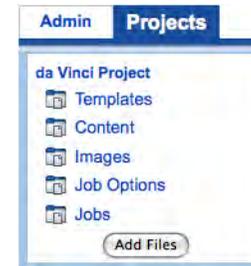
Files that are checked-in are preceded by a green arrow symbol.

Files checked out by another user than you are marked by a red stop-sign symbol. The user who's checked out the file is listed under the Checked Out By column. Once a file is checked out, other users will not be able to check out the same file. They can view the file in read-only format.

Files checked out by you are marked by a blue arrow symbol.

To edit a file that's part of a Project:

- Ensure it's not checked out by anyone else.



Name	Read Only	Checked Out By
<input type="checkbox"/>  Default CS3.indd	<input type="checkbox"/>	

File checked into the system.

Name	Read Only	Checked Out By
<input type="checkbox"/>  Default CS3.indd	<input type="checkbox"/>	Brady Ogus

File checked out by other user.

Name	Read Only	Checked Out By
<input type="checkbox"/>  Default CS3.indd	<input type="checkbox"/>	Brady Ogus

File checked out by you (if your name is Brady Ogus...)

- Check the file out.
- Make the changes.
- Save the changes.
- Close the file.
- Check the file back into the Typefi Publish Server.

Check out

To check out a file:

- Check the box preceding the file name and
- Click **Check Out**.

Alternatively, click the green icon or click the File Name link itself.

Check in

To check in a file:

- First ensure the file has been saved (in Word, for example) and closed.
- Check the box preceding the file name and
- Click **Check In**.

Alternatively, click the blue arrow icon.

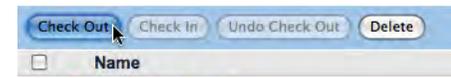
Continue work on checked-out file

To continue working on a file that was previously closed and saved but not yet checked back into the system:

- Either Check In the file first, then Check the file Out or
- Click the File Name Link to reopen the file from your local computer and continue editing the file.

Templates

The Templates folder contains all available InDesign templates that are part of a Project. A Typefi template is a normal InDesign document that has been prepared by a production designer for automatic page composition. A production designer uses the Designer plug-ins added to InDesign to prepare such templates. (Please



Checking out a template file.



Checking in a template file.

refer to the 'Typefi Designer' part of this User Guide for extensive notes on preparation of the InDesign Templates.)

Working with Typefi templates begins with the creation of master pages in InDesign. The master pages are the foundation of Typefi's automation and are designed using familiar InDesign techniques. Repeating logos, page numbers, headers and footers and background images are all commonly found on master pages. In addition, the master pages contain specially-tagged Typefi text frames for run-in of content. Content flow can be general editorial content or table of contents data.

The templates further contain paragraph, character and object styles used during document- and content-creation, as well as elements that are repeatedly used throughout the layout—such as photo-plus-caption elements, pull quotes, margin notes, etc...

Adding a template

Templates are InDesign documents that contain special markup added using Typefi Designer plug-ins. When you create a new project, there are two default templates you may use (or delete). One of them is suitable for InDesign CS4, and one for CS5. You will probably want to create a new InDesign document, save it, and add it to the project.

You might want to re-use a template created earlier for another project that already contains all the relevant markup (sections, fields, elements, etc.) added by Typefi Designer. Or you might have a regular InDesign document you'd like to use as the basis for the dynamic template development with Typefi Designer in InDesign. In either case you can add the InDesign document to the project from within the Typefi Publish Server.

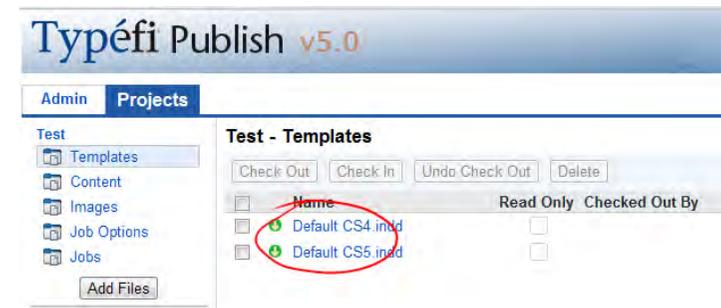
To upload an InDesign document (.indd not .indt) to the Templates directory:

- Click the **Add Files** button in the Templates window.
- The File Manager is launched and a window appears in which you can choose the file.

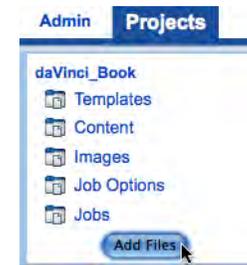
On the Windows platform, the File Manager usually doesn't come to the front, and you may need to activate it through Windows Task Manager (CTRL-SHIFT-ESC).

- Next locate the InDesign (.indd) document on your system and select it.

Project Folders



New Project with default templates.



- Click **Choose** (Mac) or **Open** (PC) to add the file to project Templates folder.

The file is automatically uploaded to the Project > Templates folder on the Typefi Publish Server.

The yellow warning triangle to the right of the file name indicates that template XML file (.xml) for the template is missing. This file is required and contains a summary of all the Typefi information within the InDesign document.

To create the missing .xml file:

- Check out the file.
- Save it from InDesign.
- Close the file and check it back in.

The .xml file is updated after each InDesign file check-in to the Typefi Publish Server.

Note: You might see .xml files sitting in the same directory as InDesign files with the same name. When the Designer plug-in is installed in InDesign, each time you save an InDesign file the associated .xml file is created.

Deleting a template

To delete a template from a Typefi Project:

- Click the Project name link on the Typefi Publish Server browser interface.
- Click Templates in the directory list.
- Select any template you want to delete.
- Click **Delete**.

A warning dialog is displayed:

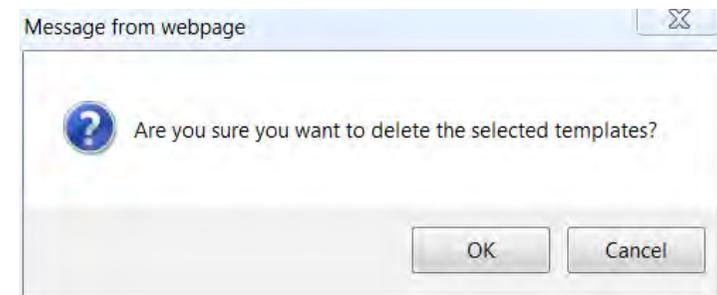
- Click **OK** to go ahead and delete the template file from your project.
- Click **Cancel** to stop the deletion and return to Templates.

Using multiple templates

A project can contain multiple templates. Using multiple templates is particularly handy where the same content must be published to different layouts or page sizes.



An InDesign Template recently added to the project



Warning upon deleting a template.

For example: A company publishing books in different countries might use templates based on document setups. A US document size might be based on ANSI Letter, where the Australian publication requires printing on ISO standard A4.

Content

The Content folder icon reveals the Project content files and contains two content tabs: Documents and Sections.

Documents store the project's Word documents (.doc) and Rich Text Files (.rtf) **The new .docx format is not acceptable at the moment.** Each document in the Documents list contains one or more Sections (if marked up correctly).

Save new Word 2007/2010 .docx file types as earlier Word .doc file types to avoid any problems with checking files into the Typefi Server.

'Sections' are the files that are extracted from Documents in XML format when 'Update Sections' is clicked.

Add documents

To add one or more Word documents to a Typefi project:

- Click **Add Files** in the Content window.
- Next locate the Word (.doc or .rtf) documents on your system and select them.
- Click **Choose** (Mac) or **Open** (PC) to add the file to the Contents folder.

The file is automatically uploaded to the Project > Contents > Documents folder on the Typefi Publish Server. The Word document can then be edited after check out using the Typefi Writer. On conclusion of the editing process the author will check the files back in, so that they become available to other users again.

Display documents

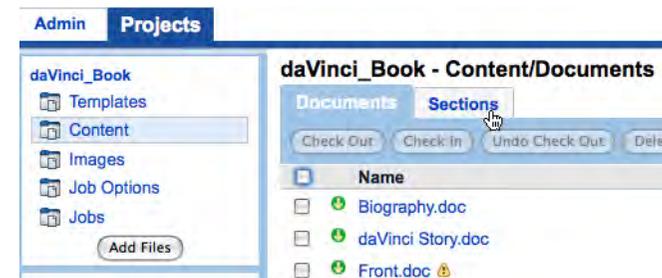
To display Documents:

- Click the **Content** link to display Documents content.
- To display the Documents when Sections content is active, click **Documents**.

To display Sections content:

- Click **Sections**.

Template Sections, Elements, Table Styles and Paragraph and Character Styles set to 'Export to TemplateXML' become available to Typefi Writer (any Styles in folders are automatically excluded, but may be manually chosen). *It is highly recommended that Section, Element and Style names across templates are consistent.* This is to ensure that all Sections, Elements and Styles used in the Word content by the author exist in whichever template is used when Printing or Running a Job (see also [Job Options with 'Full Console' access, p. 35](#)).



Click the Documents tab for a list of documents, or the Sections tab to see extracted Sections listed.

Content / Documents

'Documents' is the content location from where the author can check in/out Word documents for editing purposes. Files in Documents are stored in .rtf or .doc format.

The yellow warning triangle right of the uploaded file in Documents indicates that the document is new to the project and that Sections have not yet been extracted from it.

Content / Sections

Sections list all the individual XML-based section files that were extracted from files in Documents. (This repository may also be used in work-flows where editing is done via check-in and check-out of the individual SXML files.)

Adding sections

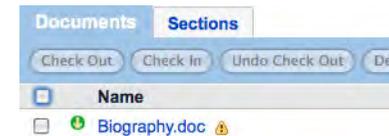
After applying the Update Sections command to a selected Word document in Documents, the XML content will be added to Sections.

To Update Sections:

- Click **Contents** to display **Documents**.
- Ensure that Word documents are checked in.
- Place a check next to the Word documents from which sections must be extracted.
- Click **Update Sections**.
- When the section extraction is complete, the check disappears.



Sections have now been extracted into .sxml documents that represent the individual sections.



A recently-added content file.



Extracted Sections listed.

Updating Sections of a Content file

- Click **Sections** to display the extracted sections.

Once sections are updated they become available to the Job Options (see [Job Options with 'Full Console' access](#), p. 35).

Each time the Word documents are updated by the author, you should 'Update Sections' to ensure the Sections repository contains the latest content.

Images

The Images folder icon reveals the Project graphics referenced by authors in their content files.

Images are added either when the author checks in a Word document after editing it, or by choosing Add Files.

All file formats other than .rtf, .doc and .indd will be automatically added to the Images repository.

To add images:

- Click **Add Files**.
- Next locate the image file(s) on your system and select those to be added.
- Click **Choose (on Mac)** or **Open (on Windows)** to add the file to the project Images folder.

Job Options with 'Full Console' access

Job Options are used by the Typefi Engine during automated page composition and they define which templates, extracted sections, conditions, engines, and scripts must be used during the composition process. They bring together content and template and output professionally-designed InDesign documents (and other file formats if required).

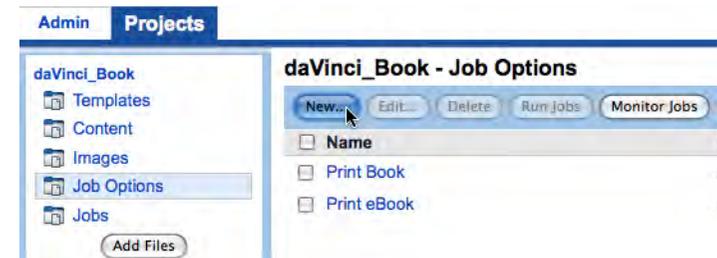
To display available Job Options (with Full Console):

- Click the **Job Options** icon in the project window.

A list of available Job Options is displayed.

New Job Options

To create a new job option:



New job options for project

- Click **New**.

The 'Create Job Option' window opens that contains all of the settings available for page composition.

- Enter the **Job Option Name**.

Choose a meaningful name (such as a description of the final output format), as the Job Option will appear in the Typefi Publish Server Web Interface as well as the Typefi Writer Print dialog in Word.

- Select the **Typefi Template** that is used for the output to InDesign.
- Enter any other Job Option-specific settings.
- Click **Create** to add the Job Option to the Project's Job Options List.

General settings

JOB OPTION NAME

Job Option Name is what appears first in the list of Job Options. In addition to using this to publish from Typefi Publish Server directly, the Job Option name is referenced when publishing from Word (and through the WSI, such as when publishing non-Word content (XML) from a Content Management System to Typefi Publish).

TYPEFI TEMPLATE

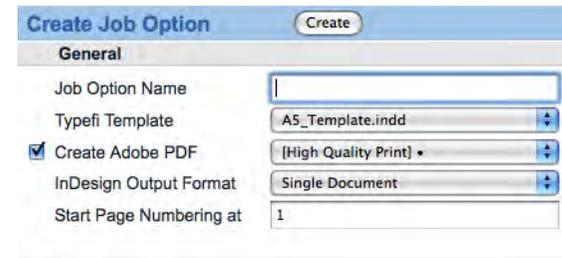
From the list of available templates, select the InDesign Template that is to be used during page composition. For projects containing one template only, the available template is automatically selected when a New Job Option is created.

NB: Further automated template selection occurs when a template referenced by a Job Option is removed from the project (it may not be the one you want, so check after deleting templates).

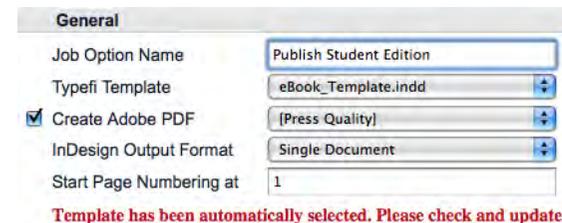
In cases where a specified template is no longer available, the first available template (alphabetically chosen) is automatically selected.

In cases where there are no templates available at all, the Typefi Template setting in the Job Option displays a clear warning that 'There are no templates for this project'.

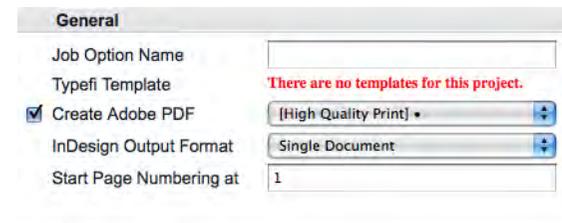
NB: Without an available template no jobs can be published through Typefi Publish.



The Create Job Option window with the option to create a PDF.



Automatically-selected template



Project with a missing template.

CREATE ADOBE PDF

Enable this option to generate a PDF document when publishing jobs through Typefi Publish.

Then choose a suitable Adobe PDF Settings from the dropdown menu.

Note: Available PDF Settings are based on settings added by the Administrator for the Typefi Engine used to run a job. The '--use engine type default --' setting uses the default PDF Export Preset set for the selected Engine Type.

INDESIGN OUTPUT FORMAT

'Single Document' generates a single InDesign document during page composition, merging all sections that make up the selected content (see [Content](#), p. 40) into a single file.

'Book' generates a book file that references individual InDesign documents created during page composition. Each selected section used as Content (see [Content](#), p. 40) generates an individual output file.

NB: As InDesign does not permit a TOC to be targeted at a particular page range, the preferred method for creating section-based TOCs is to ensure you generate these publication parts as separate jobs using the 'Create Book' option.

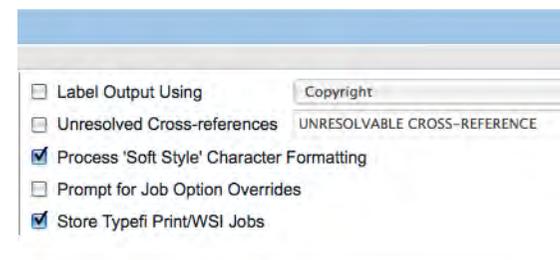
START PAGE NUMBERING AT

'Start Page Number At' defines the page number for the first page of the first section that is being published.

Note: In some cases you might see an additional page added to a document as a result of setting a first page number. Most likely this will relate to the InDesign document setup that is used as a template. The document might be set-up in such a way that it forces a left or right-hand page start. If this occurs, please review the InDesign document template.

LABEL OUTPUT USING

When enabled, the 'Label Output Using' setting controls the naming of published files based on a Project Field value. This Project Field could be specifically set-up for the purpose of naming the files.



General settings in a Job Option.

Jobs published without the use of an output label will use the Job Option name to name the resulting files. For example: if the Job Option Name is “Print Book” the published files would be named: Print Book.indd; Print Book.pdf; Print Book.log; Print Book.cxml

UNRESOLVED CROSS-REFERENCES

When enabled, ‘Unresolved Cross-references’ defines the way to handle cross-references that cannot be properly generated during page composition. Select ‘Keep Last Known Text’ to insert the cross-reference text last used or ‘Replace Text’ and enter the preferred text that is to replace an unresolvable cross-reference. When ‘Specify How to Handle Unresolvable Cross-references’ is not enabled, the default Replace Text “UNRESOLVABLE CROSS-REFERENCE” is inserted during page composition.

PROCESS ‘SOFT-STYLE’ CHARACTER FORMATTING

Character-level formatting applied in Word (using the buttons such as B (Bold), I (Italic), Underline (U) as well as Superscript and Subscript Font Effects) is retained and passed on to InDesign when this option is enabled.

SOFT-STYLES IN WORD AND INDESIGN

Soft-Style success is heavily based on the font choices made by the production designer developing the InDesign templates. Generally speaking, the author working with Typefi Writer in Word would not be using the same fonts, but more likely some common word-processing fonts such as Times or Arial when writing or editing their content.

If a font used by a Paragraph Style defined in InDesign contains a ‘Bold’, ‘Italic’ and ‘Bold Italic’ font-style, you’ll probably see a successful soft-style conversion into InDesign. Generally you can test the inclusion of soft-styles in InDesign by using the soft-style shortcuts Cmd+Shift+B / Ctrl+Shift+B for Bold and Cmd+Shift+I / Ctrl+Shift+I for Italic. Combining the two would generate the “Bold Italic” soft style. However, even when InDesign Desktop correctly applies the soft-styles, you might not be guaranteed success.

The following table gives you an idea of what works and might not work:

For rare cases where the Designer plug-in cannot find a representation for ‘Bold’, ‘Italic’, or ‘Bold Italic’ than CAN be found by InDesign, please file a bug report for the specific font with Typefi. It may be necessary to provide the font as well.

Regular/Roman font in InDesign template	Soft Style in InDesign	Result	Soft Style in Word	Published Result
Adobe Caslon Pro	B	Semibold	Arial + B	Bold
Adobe Caslon Pro	I	Italic	Arial + I	Italic
Adobe Caslon Pro	B + I	Semibold Italic	Arial + B + I	Bold Italic
Century Old Style Std	B	Bold	Arial + B	Bold
Century Old Style Std	I	Italic	Arial + I	Italic
Century Old Style Std	B + I	Bold	Arial + B + I	[Bold Italic] missing style
Arno Pro	B	Bold	Arial + B	Bold
Arno Pro	I	Italic	Arial + I	Italic
Arno Pro	B + I	Bold Italic	Arial + B + I	Bold Italic
ITC Avant Garde Gothic Std	B	Bold	Arial + B	Bold
ITC Avant Garde Gothic Std	I	BookOblique	Arial + I	[Italic] missing style
ITC Avant Garde Gothic Std	B + I	BoldOblique	Arial + B + I	BoldOblique

PROMPT JOB OPTION OVERRIDES

With the 'Allow Job Option Parameters to be Overridden' enabled, any or all Project Field values assigned in the Project options can be overridden when a job is run from the Typefi Publish Server. Furthermore, Engine Configuration, Options and Condition and Scripting Options can be edited before run-time.

STORE TYPEFI PRINT/WSI JOBS

When the Store Typefi Print/WSI Jobs setting is enabled, Typefi documents published from Word or through a third-party application (such as from a Content Management System) are stored in the Jobs directory of the project.

On the Typefi Publish Server, the jobs are stored inside the Filestore/Projects Name/Editions directory.

Engine Selection

Engine availability is dependent on the installation of Typefi Publish Server and the configuration of Engines. Typefi Engines can be set up to run specific composition jobs, or have specific PDF Presets assigned to them as well as Filestore locations and user access.

To select an Engine or Engine type that differs from the Engine settings defined at Project level:

- Check the **Override Project Settings** box.
- Select **Engine Type**.
- Select **Engine**.

'Engine Type' sets the appropriate engine type for your job. A standard Typefi Publish Server install will install a Generic engine.

'Engine' selects the appropriate engine for your job.

Engine Configuration

The 'Set Max Time Per Page' option defines the maximum amount of time spent on a page composition during the automatic composition process.

'Set Max Layouts Per Page' defines the maximum number of layouts the Typefi Engine can try out during the automated composition process.

Condition

From the list of available conditions, check the conditions for which conditional content must be included during page composition. Uncheck conditions for which content is to be excluded during page composition.

Content

The 'Content' section of a Job Option allows you to choose which sections will be included when publishing the job from Typefi Publish Server. All content available comes from the sections that were extracted from Content/Documents or loaded to Typefi Publish from source ContentXML (see also [Content / Sections](#), p. 34).

The screenshot shows the 'Engine Selection' configuration panel. It has a title bar 'Engine Selection'. Below it, there is a checked checkbox labeled 'Override Project Settings (Generic/Sample Engine)'. Underneath, there are two dropdown menus: 'Engine Type' with 'Generic' selected, and 'Engine' with 'Sample Engine' selected.

Engine Selection.

The screenshot shows the 'Engine Configuration' configuration panel. It has a title bar 'Engine Configuration'. Below it, there are two options: 'Max Time Per Page' with a checked checkbox, a text input field containing '30', and '(seconds)' to its right; and 'Max Layouts Per Page' with an unchecked checkbox and an empty text input field.

Engine Configuration.

Condition	Description
<input checked="" type="checkbox"/> Student	Content marked up for student edition only
<input type="checkbox"/> Teacher	content marked up for teacher edition only

Content marked up for student edition is included when publishing using the selected Job Option.

Only sections listed under 'Selected Sections' are included in the output of the job. Sections listed under 'Selected Sections' can be sorted by selecting them from the list and clicking the 'Up' or 'Down' buttons at the bottom of the Selected Sections list.

To add sections to the 'Selected Sections' list, select the sections from the 'Available Sections' list, then click . To add all sections from 'Available Sections' to 'Selected Sections', click .

Remove sections

To remove sections from 'Selected Sections', select the section name (or names) to be removed then click . The removed section is added at the bottom of Available Sections. You may only sort sections in the 'Selected Sections' list.

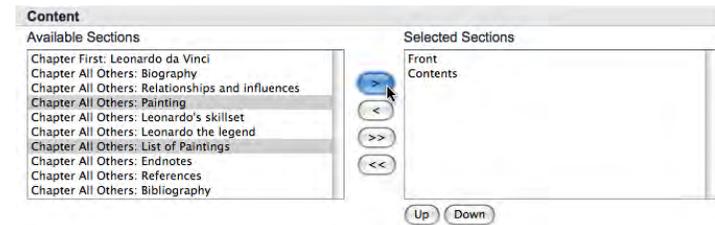
To remove all sections from 'Selected Sections', click . All sections are now listed under Available Sections.

Scripting Options

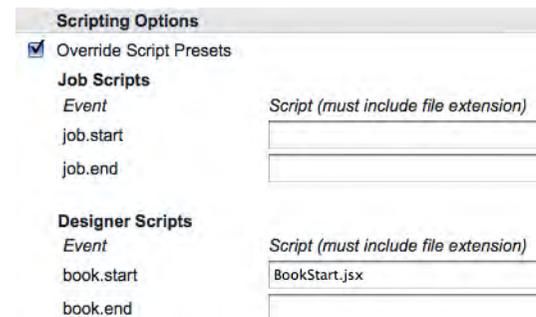
Scripts are files of code that enable alterations to the default configuration settings Typefi Publish applies. Scripts must be installed in their appropriate script folder (such as 'BookStart') on the Typefi Publish Server. The Job Options will run generic scripts (referred to by name in the Job Option setting itself, such as 'BookStart.jsx'), which will access the specific scripts from these predefined locations. Job Scripts and Designer Scripts run before, during or after page composition; or at other times such as the start or end of a job.

Job Scripts are server-based scripts and are installed in the scripts folder inside the Typefi/Publish/Server folder. Job Scripts are invoked by the Typefi Publish Server either before a job is run, or on completion of the job (see also [Running a Job with Full Console access](#), p. 43). Designer Scripts are InDesign Scripts developed in JavaScript (Mac- or PC-compatible), and are installed in the InDesign CS5 Server/Scripts folder.

Override Script Presets: Enabling the Override Script Presets option allows for Job Option-based calling of Job and Designer scripts. With the setting enabled, type the exact name of the script (including its file extension) in the relevant Event field.



A list of 'Available Sections', with some sections moved to 'Selected Sections' for inclusion in the job to be published.



Job option that uses a feature enhancement in the form of a script at the start of creating an InDesign Book.

Editing Job Options

To edit a Job Option:

- Click the **Job Options** folder.
- Check the appropriate Job Option.
- Click **Edit....**

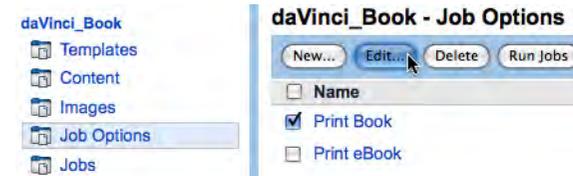
Or:

- Click the Job Option Name link.
- Click **Edit Job Option**.

The Edit Job Option window is displayed.

- Make the relevant changes in the options.
- Click **Save** at the top or bottom of the Edit Job Option window to acknowledge and store an updated version of the job options.

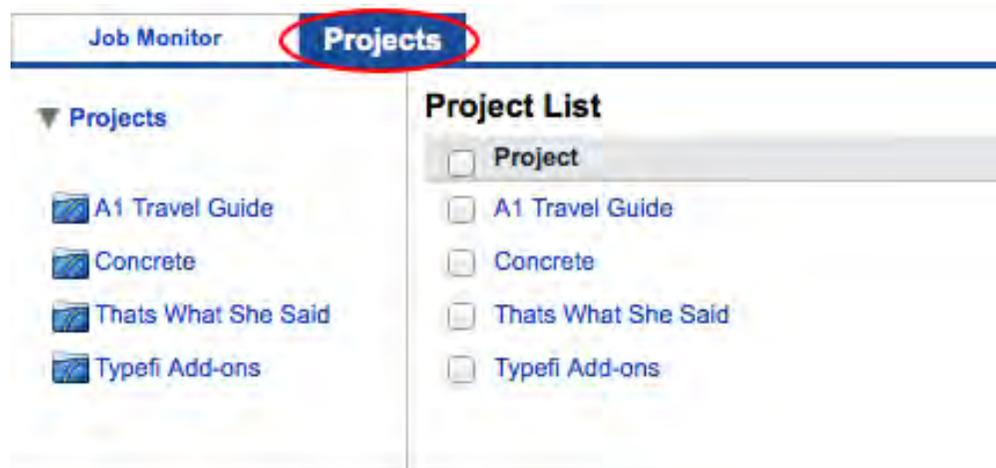
Save Job Options.



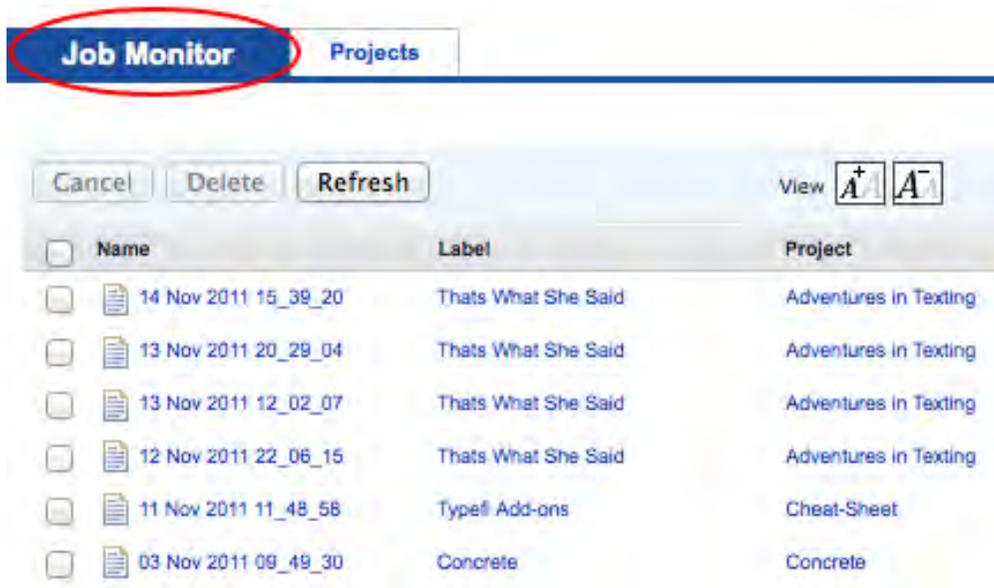
Editing a Job Option.

Job Options with User access

With limited access, users are presented with a simpler screen (depending on whether they were given Full, or Simplified Console access). Here are the screens you would see as a non-Admin User with Full Console access to assigned projects.



Full Console access to assigned projects



Full Console access to Job Monitor

Running a Job with Full Console access

One or more Job Options can exist for each project. In order to commence automated page composition a job must be run.

To publish a Job from the Typefi Publish Server with Full Console access (for Simplified Console, see [Run Jobs with Custom XML](#) on p. 7):

- Click the **Job Options** folder to display a list of available job options.
- Check the Job Option name.
- Click **Run Job**.

Page composition will commence and the Typefi Publish Server automatically displays the Job Monitor listing all Jobs published and being published for the selected Job Option.

When a Job Option is currently being used to publish a job, a progress bar appears next to the Job Option name. If the last job for a particular Job Option failed, a red cross icon will appear next to the Job Option Name.



Run selected job.

On successful completion of a job, the Typefi Publish Server will briefly display a red message window stating that the Job has completed successfully:

Job '16 Jun 2009 23_49_44' has completed successfully.

Job Monitor

The Job Monitor lists all failed jobs; jobs in progress; pending jobs; jobs that were roundtripped; and completed jobs in reverse chronological order.

Job Monitor for Jobs Option

To Monitor Jobs for selected Job Option:

- Click the **Job Options** folder.
- Check the Job Option.
- Click **Monitor Jobs**.

The Job Monitor appears, listing jobs that have been run, and the results.

Filter By option

The default 'Filter By' option is set to 'Project' so that only jobs for the selected project are displayed. Changing the 'Filter By' option to 'Show All' displays all jobs for the selected project regardless of which selected Job Options are listed.

To list all failed, completed, or in-progress jobs for any project:

- Change the **Filter By** option to **Show All**.

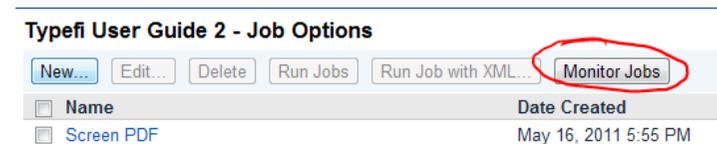
Monitor Jobs from Project

An alternative method to use for displaying all jobs for a particular project is to:

- Click the project name in the Projects list.
- Click the **Jobs** folder link.

The Job Monitor for Project 'project name' window lists all jobs in reverse chronological order. To list all failed, completed, or in-progress jobs for any project:

- Change the **Filter By** option to **Show All**.



Monitor Jobs for selected Job Option.

New in V5 is the ability to monitor the job log generated by the Typefi Engine during job composition. When a job is running clicking on its folder name will display the job event log. New events will be appended to the bottom of the list.

After a job is finished, successfully or not, clicking on the job name will go to the job folder page.

(This new feature is very handy, as you don't have to wait until the Job is finished to see any errors. The Job can be cancelled; any errors dealt with; and the Job run again.)

Admin Jobs Monitor

Users with administrator-level access to Typefi Publish Server can view all jobs for all Projects through the Admin tab in the Typefi Publish Server.

To access the Job Monitor as an Administrator:

- Click **Admin**.
- Click **Job Monitor**.

User Jobs Monitor

Users with non-administrator level access to Typefi Publish Server, will only see jobs belonging to projects of which they are a member.

To access the Job Monitor as a User:

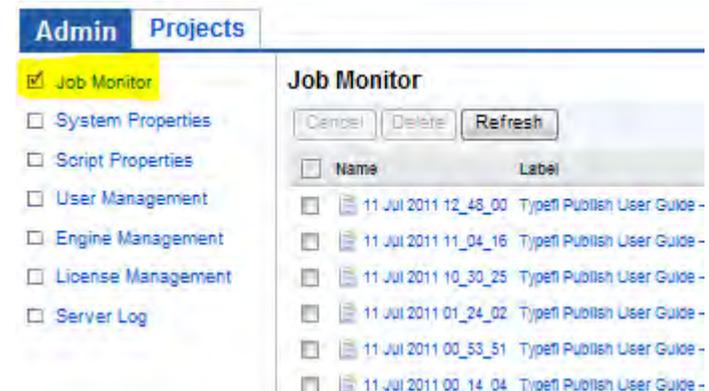
- Click **Job Monitor**.

Monitor Jobs settings

There are three Job Types: Completed, Roundtrip and Print Jobs.

To edit the Monitor Jobs settings:

- Check the checkboxes for the preferred Job Types.



Job Monitor with Admin Access



Job Monitor with only User Access

Job types

Completed Jobs lists jobs published from the Typefi Publish Server. These jobs are run by selecting a Job Option, then clicking 'Run Job'.

Print Jobs list jobs printed from Word using the Typefi Print... command, and contain a small printer icon to the right of their name. (They also include any jobs sent for publication through the WSI):  21 Jun 2009 08_26_37 

Roundtrip jobs list jobs that were created after a previously-run job was updated. When a job has been created via Typefi Print... or Run Job..., the composited InDesign file may be checked out and edited. After editing the InDesign file, save it, close it and check the file in and Update Sections to update the Section content repository. When this updated content is used to Update a Word document and the Word document is published, the job is classified as being 'roundtripped'.

Roundtrip jobs are marked by a small yellow symbol:  16 Jun 2009 23_57_50 

Failed jobs are preceded by a red 'x' icon. This icon will also appear for jobs that have been manually cancelled (see [Cancel Job](#), p. 47):  16 Jun 2009 23_54_32

Jobs in Progress are preceded by a small document and clock icon:  16 Jun 2009 23_49_44

Jobs that are Pending are preceded by a clock icon:  16 Jun 2009 23_54_32

Successfully published Jobs generate content.xml; a completed InDesign document; a log file; and (optionally) a PDF (other possible output includes ePub). For jobs set to output an InDesign 'Book', the job generated contains multiple InDesign files as well as an InDesign Book Document (.indb).

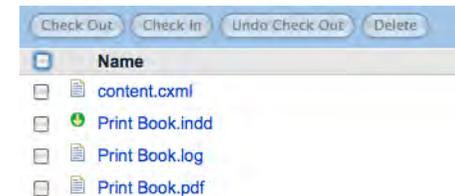
To access job components:

- Click the job name link in the list of Monitored Jobs.
- Click on the particular component (usually the PDF, but often the log and the INDD are very informative).

Jobs that are still in progress are marked by a small clock icon:  16 Jun 2009 23_49_44

Typefi Publish Server automatically updates the Monitor Jobs window if the Freeze option isn't selected, and a progress bar indicates the job progress. To manually update the list of monitored jobs click Refresh.

In version 5, the Job Log is live – you can watch the progress of the Job and pick up any problems as they occur. Just click on the Job Name as soon as it starts, and you will go directly to the Log.



Post-job processing result.

Delete Jobs

To remove a job from the Typefi Publish Server and the Monitor Jobs list:

- Select the job in the Job Monitor.
- Check the Jobs you'd like to remove.
- Click **Delete**.
- A warning "Are you sure you want to delete selected jobs?" appears.
- Click **OK** to delete the job or
- Click **Cancel** to return to the Typefi Publish Server without deleting the job.

Cancel Job

To Cancel a job that is in progress from the Monitor Jobs list:

- Select the job in progress in the Monitor Jobs list.
- Check the job you'd like to cancel.
- Click **Cancel**.
- A warning "Are you sure you want to cancel selected jobs?" appears.
- Click **OK** to cancel the job or
- Click **Cancel** to return to the Typefi Publish Server without cancelling the job.

Exporting a Project

Project export collects all Templates, Content, Images and Job Options belonging to the active project and combines these in a compressed .tzip file (Typefi ZIP).

Project export

To export a project:

- Select the project from the Projects list in the Typefi Publish Server.
- Click **Export**.
- Alternatively click the Project Name and click the **Export Project** button.

The exported project is saved as .tzip file and will contain all job options, templates, contents and images that form part of the project.

Exporting projects is a great way to archive projects (and provide Typefi with work files to trouble-shoot). However, keep in mind that the actual jobs require separate archiving as they are not collected as part of the project export. If jobs require separate archiving you'll have to copy them from the 'Editions' folder inside the Project folder on the Server. **With version 5, you can combine multiple projects into a single '.tzip' archive.** Just select multiple projects and then click Export.

Note: Project scripts, fonts, and jobs are not included in a Project Export. In addition, any Engine override settings are not kept for export.



Exporting a project.

Importing a Project

A previously-exported Typefi Project in compressed .tzip file format can be imported, and added to the Typefi Publish Server.

Project import

Import of Typefi Projects can be useful where existing projects form the basis of a new project or where a project must be recreated on a different Typefi Publish Server or system. In the first scenario, previously-created project template(s) are reused; project field values amended to suit the new project; job options amended; and content regenerated or updated.

Only projects exported from the Typefi Publish Server can be imported. Exported Project files are saved with the .tzip extension. Use the following instructions to import a Typefi Project .tzip file as a new project using the Typefi Publish Server.

Importing a project

In order to import a project you must be a user with administrator user access. Log in to the Typefi Publish Server from your web browser using the Typefi Publish Server address details, then enter username and password supplied to you by the Typefi Publish Server administrator.

- Click the *Projects* tab.
- Next click *Import*.

The Import Project window is displayed.

- Click *Browse* (or *Choose...* on Mac) to navigate to the .tzip file for the project you'd like to import.

Select Archive to Import

The archive may include one or more projects.
Project name(s) and description(s) will be read from the archive.

Project Archive No file chosen

Importing a project from a .tzip file. The name and description are imported in the process.

- Select the .tzip file then click **Open** (PC) or **Choose...** (Mac) to add the location of the .tzip file to the **Archive Path**.

The **Archive Path** now displays the location of the .tzip file.

- Next click **Import**.

The project is (or projects are) added to your project list and the Templates, Content, Images and Job Options that were saved as part of a previous project export are available again.

Note: No jobs will be added when a project is imported to Typefi Publish Server, as jobs are not included when projects are exported.

Production designers and authors can now continue work on InDesign templates using Typefi Designer and content files using Typefi Writer as well as run jobs and print jobs. The project is ready to go.

Typefi Publish

Typefi Publish User Guide - Designer

June 2011



Typefi Designer Plug-In for Adobe InDesign

With the installation of Typefi Designer, several panels, tools, menus and preferences are added to Adobe InDesign. Typefi Designer is a set of plug-ins for InDesign used to transform regular InDesign templates or documents into files that can be used in the Typefi Publish automated publishing process.

Production designers use familiar InDesign panels and techniques to add the automation parameters to the InDesign documents.

Once an InDesign document is prepared for automation, it is uploaded as a template for a publishing project on the Typefi Server (*see 'Adding a template' in the Typefi Systems Server User Guide*). The template is then specified within a Job Option (*see 'Job Options' in the Typefi Systems Server User Guide*) so that content can be published.

Typefi Designer performs several functions: user-based automation design, Typefi Engine-controlled document automation, (post-)editing of Typefi specific additions and round-tripping/export of contents.

This part of the User Guide explains how to convert a layout or an existing InDesign template into a 'dynamic' template using Typefi Designer, and explains what automation options are available to you.

The structural information added to the templates is synchronized by the server with all content in the project – once the template is checked in to the server. This ensures authors have access to all the necessary tools in Typefi Writer to format their Word documents for automated publishing using Typefi Publish.

Typefi Designer for InDesign

The Typefi Designer plug-ins install new panels, an additional tool, extra menu commands and a number of Typefi preferences into Adobe InDesign. It also installs additional panels inside the InDesign dialogs to edit paragraph, character and table styles. Typefi Designer installs the following five Typefi panels in InDesign:

- Typefi Sections
- Typefi Fields
- Typefi Frames
- Typefi Elements
- Typefi AutoFit

Each of the panels plays an important part in using Typefi Designer and is used to create dynamic InDesign templates useable for automated page composition through Typefi Publish.

Typefi Sections

Sections are the divisions within a document that break it into logical chunks such as chapters. Sections specify which master pages to use, and in what order. (See [Typefi Sections](#) on p.69)

Typefi Fields

Fields are text placeholders that automatically update if the author changes the definition. (See [Typefi Fields](#) on p.94)

Typefi Frames

InDesign frames are modified to be dynamic Typefi Frames – they are automatically filled with text or graphics according to specifications. (See [Typefi Frames](#) on p. 81)

Typefi Elements

There are three types of elements: Fixed, Inline and Floating Elements. They can be formed from a single frame, or a group of frames, and can also include line or shape objects. In addition, Elements can contain Element Content or Image frames as well as Fields. (See [Typefi Elements](#) on p. 103)

Typefi AutoFit

The Typefi **AutoFit tool** allows project designers to define parent-child relationships between objects by clicking on them in sequence. When the parent object is moved or resized as a result of content fitting – for example, more text would make a frame grow – the child object will reposition or resize as well. The **AutoFit panel** is used to select from which point it may grow; and to provide limits on its growth/shrinkage. (See [Typefi AutoFit](#) on p. 65)

Preparing InDesign Templates

When you develop InDesign templates to be used for publishing through Typefi Publish, it requires a lot of careful planning and preparation.

Good template design requires you use InDesign ‘best practices’ such as multiple Master pages; ‘heirarchical’ Paragraph and Character styles (styles based on other styles); Table and Cell styles; Text Variables for running headers; and so on.

Typefi’s automatic page composition process relies on the definition and setup of Typefi Sections that call on Master Pages which, in turn, determine the flow of content on document pages. Paragraph, Character, Object and Table styles enable the efficient assignment of text, table, and object-level formatting. Design elements are defined as Typefi Elements that are automatically placed during the composition of a document. Standard InDesign frames are converted into Typefi Frames, which are receptacles for text and image content. So where do we start?

Analyzing the design

The structural information added to an InDesign template defines the styling and other presentation information that is part of that design. ***Any two templates that have the same underlying structure can process the same content***, even if those templates use different page sizes, element formatting, colors and fonts.

Five important components form the structure of a template: Typefi Sections, Typefi Fields, Typefi Frames, Typefi Elements, and tables. Paragraph and Character styles are also integral to the process. We will focus on these in-depth in this user guide.

Example: A publication might be published in different page sizes, such as US Letter and A4 for print, and a layout intended for on-screen reading as well. Building multiple templates with identical structure but different layouts enables run-in of the same content with different output results.

Starting work on the template

You can create a Typefi template from a new document, or you can base it on an existing design or InDesign layout. When creating a Typefi template from a new blank document, a good starting point is to develop a mock-up layout of the publication. This layout will then form the basis for the template creation. Styles are used to maximize the design-driven composition Typefi Publish offers.

Recurring items in a design such as graphics with captions, margin notes, pull-outs, quotes etc. are made into Typefi Elements. These elements are accessible to the author in Word and populated and positioned during page composition with author-defined content.

We will use a mock-up as a starting point for the User Guide Typefi Project.



Sample publication.

Master Pages

When reviewing the use of master pages at the start of your template creation consider the following: Does your design contain different parts? If yes, what are these parts? These parts would probably become InDesign Sections as you are creating the document.

As an InDesign 'best practice', InDesign sections are created in InDesign's **Numbering & Section** options. The pages belonging to a section are based on master pages and can include a section marker. When preparing a design for development of a structured and dynamic Typefi InDesign template, reviewing the consistency in design choices and usage of master pages is a good starting point.

When looking at the daVinci design you might notice some of the following:

The Front Matter of the Document is built up as follows:

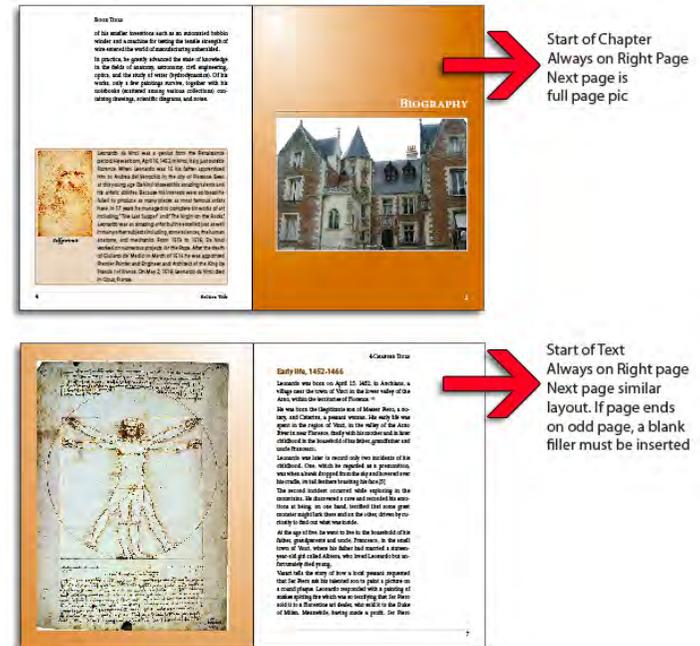
- First Odd Page is Half Title Page.
- Next Even Page is Blank.
- Next Odd Page is Title Page.
- Next Even page is Copyright Information.
- Following the Copyright information a Table of Contents is inserted.
- This is followed by Preface, Introduction and Chapters.
- End Matter finishes the publication.

A Chapter:

- Always starts on an 'recto' or right page which contains the chapter title and number, and an image.
- The next even page starts on a 'verso' or left page and contains a full page photo.
- The editorial text that follows after a chapter start always commences on a right page and has its own master applied to it. This master contains the Publication Title in the left header and the chapter number and chapter title in the right header.

With other projects you will discover other patterns. For example, a Higher Education publication might be structured this way:

- Chapter starts on right/odd page.
- Next left/even page is a picture page.
- Next odd page is a Learning Objectives page.
- Next even page continues Learning Objectives.
- Next odd page is where the Chapter text starts.



Reviewing the daVinci project design. Different section setups for text pages and chapter starts.

Typefi Sections

Typefi Sections determine how particular InDesign document sections such as Chapters are constructed and populated with core content. Sections define which InDesign Master pages are used during the composition process and in which order they appear.

Layers

The use of layers in InDesign allows you to easily show and hide objects contained within a single layer. As an InDesign 'best practice' approach you could consider using layers for some of the following:

- A Background layer to place objects that sit in the background, such as background tints behind pages.
- A Running Headers or Footers Layer where it is important that these items retain their order in the 'stack'.

For Typefi content you could consider using:

- A **Main Content** layer that is used for the automated page composition for the run-in of the core body content flow.
- An **Elements** layer in which Typefi Floating and Fixed Elements are placed.

Styles

InDesign contains several different style-formatting tools, each used to provide consistently looking text formatting in the fastest possible way.

Paragraph and Character Styles

InDesign paragraph and character styles are highly efficient for text formatting. It is important that all of the core content text that is going to be provided by the author can be formatted through use of paragraph and character styles in Word or XML.

Layers are a 'best practice' method that helps control the stacking order of content in InDesign. Isolating content into separate layers ensures that there is consistency in the stacking order and that objects sit above or below other objects as expected. In addition, Layers are also a great way of isolating content types, making it easier to select and edit content.

For those Typefi Publish projects that work in conjunction with Typefi Writer and Word, you can control (from within InDesign) which styles are to be made available to the authors in Word. Paragraph styles can make use of the 'next style' feature as well as the 'nested style' feature available to InDesign.

Style names: Although InDesign has no restriction on style names, you should refrain from using style names such as: "Heading 1, Heading 2, Heading 3, Title, Subtitle" (case-in-sensitive), as these style names are reserved by Microsoft Word and could cause conflicts for the Typefi Engine. To use a similar naming convention you could remove the space in these style names or add a prefix (e.g. A_Heading_1). Ensure that each style name used is unique and do not use leading or trailing space for style names nor bullet characters. (It also causes problems for the Typefi Engine if you only use numbers for style names – not that you would do that!)

Typefi Inline Image Settings

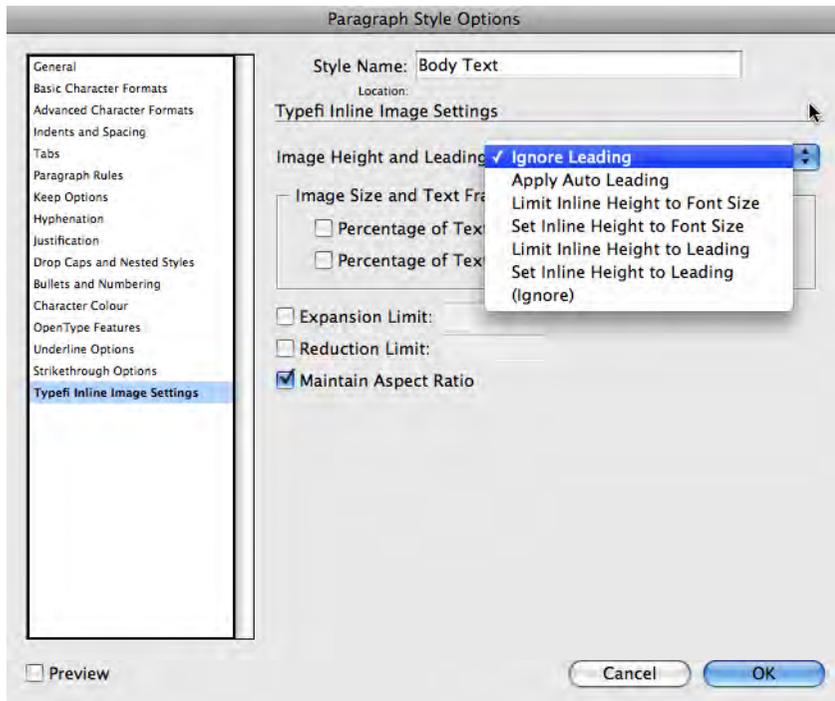
With the installation of Typefi Designer plug-ins, the Paragraph and Character Style Options include an additional category: ***Typefi Inline Image Settings***. The ***Typefi Inline Image Settings*** define how Typefi Designer will handle the sizing of Inline images and the leading.

Inline images are images inserted at the cursor position inside a paragraph that behave as individual characters do. They can be positioned:

- At the start of a paragraph.
- At the end of a paragraph.
- Anywhere inside a paragraph.
- In a separate single line paragraph.

When defining character styles you should create styles that apply minimal formatting, such as all caps, bold, italic, superscript or subscript.

By default, inline images are automatically resized to fit inside the text frame that contains them (as long as interactive preferences are disabled).



Typefi Inline Image Settings

Image Height and Leading

The **Ignore Leading** option retains the original leading for the line in which the Inline image is placed. If the Inline image height exceeds the leading height, the top of the graphic will overlap the text in preceding lines.

Note: Leading is by default a character attribute in InDesign. Enabling the *Apply Leading to Entire Paragraphs* in the standard InDesign Type Preferences will result in a leading setting change for all lines of paragraphs - including lines containing Inline images.

Apply Auto Leading ensures that the leading for the line in which the Inline image is placed is set to 'auto'. InDesign's default Auto Leading setting is set as part of the Justification settings for a paragraph. The default setting is 120% of the font-size. For Inline graphics, the height of the graphic is the basis for the leading. For example if the Inline graphic is 1inch high, the leading will be set to 1.2inch.

Leonardo, whose birth antedates that of Michelangelo and Raphael by twenty three and thirty-one years respectively, was thus in the forefront of the Florentine Renaissance, his life coinciding almost exactly with the best period of Tuscan painting.#



Leonardo was the first to investigate scientifically and to apply to art the laws of light and shade, though the preliminary investigations of Piero della Francesca deserve to be recorded.#

Inline Image in single line paragraph with Apply Auto Leading option enabled.

Limit Inline Height to Font Size ensures that the height of the Inline image does not exceed the font size and images are only resized when their original height is larger than the font size. For example, if the original height of the image is smaller than the font size, the image is placed at its original size and not resized. If the original image height is larger than the font size the image is scaled down to match the font size.

Set Inline Height to Font Size resizes the height of the Inline image to the font size regardless of its original size at placement. For example when the original image height is smaller than the font size the image is scaled up. When the original image height is larger than the font size the image is scaled down.

Limit Inline Height to Leading ensures that the height of the Inline image does not exceed the leading and images are only resized when their original height is larger than the leading. For example, if the original height of the image is smaller than the leading, the image is placed at its original size and not resized. If the original image height is larger than the leading the image is scaled down to match the leading.

When placing small pixel based images and using the Set Inline Height to Font Size or Leading option, upscaling will result in loss of image quality due to reduction of image resolution.

Set Inline Height to Leading resizes the height of the Inline image to the leading regardless of its original size at placement. For example when the original image height is smaller than the leading the image is scaled up. When the original image height is larger than the leading the image is scaled down.

INLINE IMAGE SETTINGS FOR CHARACTER STYLES

Inline Image settings applied as part of paragraph style settings are always positioned on the baseline of the line of text in which they are placed. In order to apply a baseline shift to an inline image, a character style must be used. Set the Typefi Inline Image Settings for this character style and set the baseline shift as part of this style.

After the inline graphic is inserted using the Typefi Writer, a character style must be applied over the top of it.

★ | Green ★ Blue ★ Red ★ Purple: These colours represent the Equestrian statues of the Renaissance.

Original image size smaller than Font Size. Image Height and Leading set to Limit Inline Height to Font Size.

★ | Green ★ Blue ★ Red ★ Purple: These colours represent the Equestrian statues of the Renaissance.

Original image size smaller than Font Height. Image Height and Leading set to Set Inline Height to Font Size.

★ | Green ★ Blue ★ Red ★ Purple: These colours represent the Equestrian statues of the Renaissance.

Original image size smaller than Leading. Image Height and Leading set to Limit Inline Height to Leading.

★ | Green ★ Blue ★ Red ★ Purple: These colours represent the Equestrian statues of the Renaissance.

Original image size smaller than Leading Image Height and Leading set to Set Inline Height to Leading.

green ★ purple ★ red

Inline image with baseline shift applied through character style settings.

Image Size and Text Frame Size

The Image Size and Text Frame Size define the maximum width or height of an Inline image. If the original image exceeds this size, the image will be resized based on the ***Percentage of Text Frame Width*** or ***Percentage of Text Frame Height*** settings. For instance, if the 'Percentage of Text Frame Width' is set to 25%, the width of the graphic will not exceed more than a quarter of the width of the Text Frame in which it is placed.

Expansion and Reduction Limits define the maximum and minimum upsize and downsize scaling percentage for an image during placement.

Maintain Aspect Ratio: When enabled, this ensures that images are resized proportionately.

Style Groups

Style Groups are a way of organizing Paragraph or Character Styles. The Export to Template XML option is **disabled** for style groups by default. This means that **none of the styles that are part of the group will be accessible to the Typefi Writer in Word.**

Before individual styles can have their export options enabled or disabled, the Export to Template XML option for the entire Style Group must be enabled.

Using similarly-named styles could result in the Engine selecting the wrong style during page composition. Although InDesign's Style Groups allows duplicate style names, Typefi Publish only references styles by name, and during text formatting, styles are assigned on a 'first-style' basis. Typefi Publish searches for exported styles first, then non-exported styles. After that, the second level styles (inside Style Groups) marked for Export to Template XML are considered and so on.

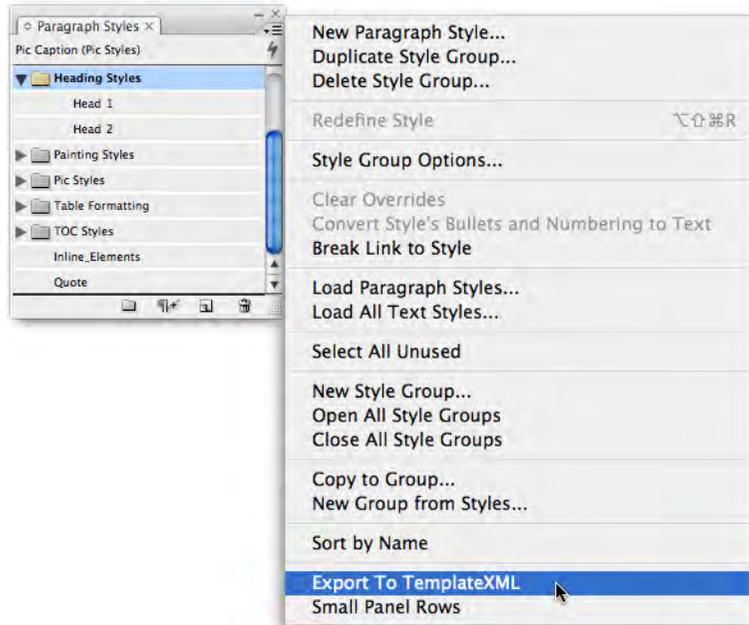
Each Paragraph or Character style with Export to Template XML enabled is available to the author working on a project's content with Typefi Writer in Word. Disable the Export to Template XML option for those styles that need not be accessible to the author in Typefi Writer (such as Table of Contents styles).

Export to TemplateXML

For Paragraph or Character Styles to be available to the author in Typefi Writer, the Export to TemplateXML option must be enabled for the particular style in InDesign. For each Paragraph or Character style created that is not part of a style group, the **Export to TemplateXML** option is enabled by default.

To enable or disable the Export to TemplateXML option for a Paragraph or Character Style:

- Click the style name in the Paragraph or Character Styles list.
- Select **Export to TemplateXML** from the Paragraph or Character Styles panel menu.
- Alternatively select a Style Group containing a series of styles and enable **Export to TemplateXML for the Style Group**.



Note: The [Basic Paragraph] Paragraph and [None] Character Styles are never exported to Template XML. The command is disabled for these styles.

Enabling 'Export To TemplateXML' for a Paragraph Style Group to make its styles available in Writer.

Object styles

Object styles are useful for many reasons, most relating to working more effectively in InDesign. When looking at Typefi structured formatting, you can use object styles for reasons other than efficient control of object appearances (such as stroke, fill, corner effects, paragraph styles, transparency settings etc.). In addition, bear in mind the use of object styles when:

- determining how Inline Elements are positioned during page composition. Both Inline and custom anchored-object settings can come in handy.
- assigning Text Wrap settings for Floating and Fixed Elements.
- formatting element content frames. Appearance and the text content of the frame can be formatted using an object style. If the paragraph style referenced in the object style contains reference to a next style and this feature is enabled, then the paragraph following the first style is automatically formatted.
- formatting of element image frames.

Elements

Elements are design components that are not part of the main paragraph-based text flow but must be positioned within or near it. Typical elements include illustrations, figures and photos, ‘marginalia’ such as sidebars, callouts, quotes and notes, and graphics that can be used to mark a break between topics.

Table Styles

Use InDesign **Table Styles** and **Cell Styles** for formatting of tables in your design. Typefi’s table style-specific features are integrated with InDesign’s Table Styles, adding additional functionality (see [Table Styles, p. 127](#)).

The Tables Styles you design in InDesign may form the basis for Typefi enhanced prototype tables. The prototype layout of a table is part of the Table Style definition.

One thing to remember at this stage is that although your original table design in InDesign might contain merged cells, the structured prototype table that you build with the InDesign’s Table Style and tools is not allowed to contain any merged cells (see [Table Styles, p. 127](#)).

Typefi AutoFit

The Typefi AutoFit panel and tool are used to define relationships between objects, frames and lines, enable automatic text frame resize behaviors, and enforce minimum and maximum object size limits. AutoFit relationships, resize styles and min/max size limits enable designers to create dynamic page objects that react and respond automatically as content changes.

New features in Publish v5 include:

- AutoFit relationships, resize styles, and size limits are now preserved when exporting to a snippet file, an object library or InDesign Interchange (INX) or InDesign Markup (IDML) files.
- Corners are now supported as reference points for AutoFit relationships.
- Bi-directional and multi-parent relationships are also now supported.
- Relationships can now be created between a graphics frame and its content.

AutoFit tool

The AutoFit tool is used to create parent/child relationships between two objects. Resizing or moving the parent object simultaneously triggers a resize or movement of the child object.

- Select the AutoFit tool from the toolbar.
- Using the parent pointer (⇧+↖), select a reference point of the bounding box of the first object.
- Using the child pointer (⇧+↗), select a reference point of the bounding box of the second object.



The Typefi AutoFit tool – added to the Tools panel

Relationships are between reference points of the bounding box, not anchor points on the object path. They can be created between objects that are placed on different layers, but not between inline objects, inline and page objects, or to an entire group (individual objects within a group are allowed). Complex relationships can be created by daisy chaining multiple parent/child relationships, using the same parent with multiple children (one-to-many or many-to-one), or by defining bi-directional (parent-to-child and child-to-parent) relationships.

Reference types

AutoFit relationships have different behaviors depending on which reference point of the bounding box is selected for the child:

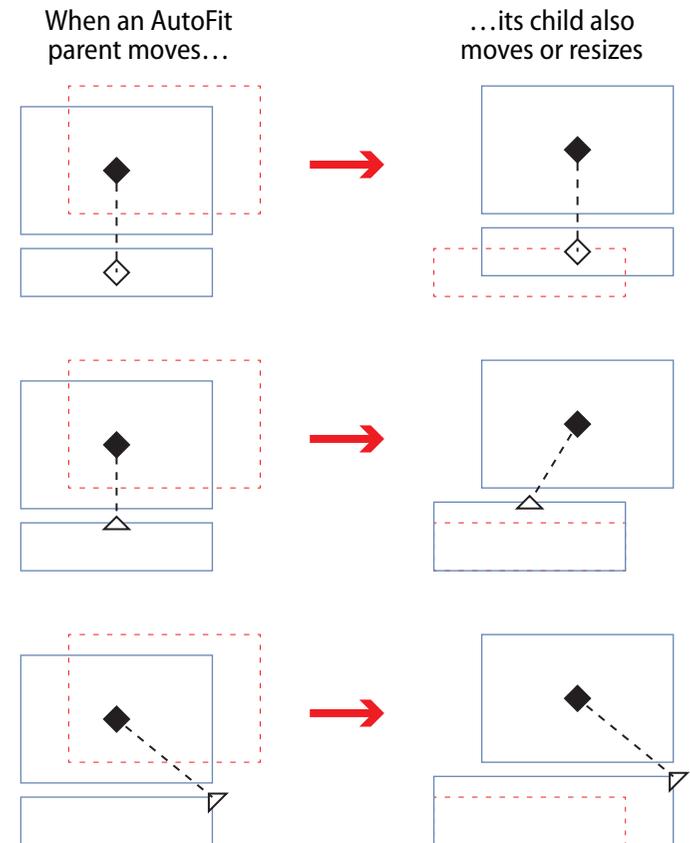
- **Center** reference points (◊) move rather than resize the child object.
- **Edge** reference points (△) resize a child object by stretching the frame along an invisible axis perpendicular to its edge.
- **Corner** reference points (▽) resize an object by stretching the bounding box diagonally along an invisible axis radiating from the center through its corner.

AutoFit will not scale stroke width or the frame contents when resizing objects, however, it can now create relationships between a graphics frame and its content. Objects may also have multiple relationships, where moving or resizing the parent point or object will trigger multiple child relationships.

Changing a relationship

To redefine an existing AutoFit parent/child relationship, simply move the child reference point or object—you can't change a relationship by moving or resizing the parent because the child automatically resizes or moves according to the original relationship.

While AutoFit previously allowed you to invert a parent/child relationship by reversing the selection—using the AutoFit tool to reselect the child first, followed by the parent—these steps now create a bi-directional relationship, where moving or resizing either object triggers a change in the other object.



Removing relationships

AutoFit relationships can be removed by using the AutoFit tool to trace over an existing relationship—reselect the parent reference point first and then reselect the child. Or, choose **Remove Relationships** from the AutoFit panel menu to remove all relationships from the selected object(s).

AutoFit panel

The AutoFit panel is used to enforce minimum and maximum object size limits, and enable automatic resize styles for text frames. When combined with AutoFit parent/child relationships, the AutoFit panel options enable the design of adaptive layouts that dynamically react to content changes.

Minimum and maximum object size

The top portion of the AutoFit panel enables you to limit the width and height of individual page objects. The two controls on the left affect the minimum width and height, while the two controls on the right affect the maximum width and height.

You can type limits into the fields, or click the minimum or maximum width or height buttons to copy the measurements of a selected object. When multiple objects are selected, AutoFit copies and applies the measurements of each object as unique limits.

Removing object size limits

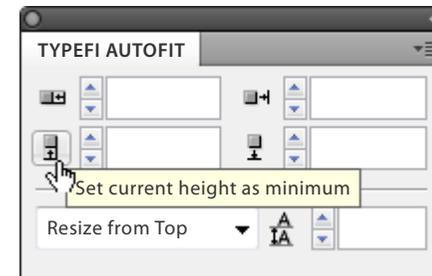
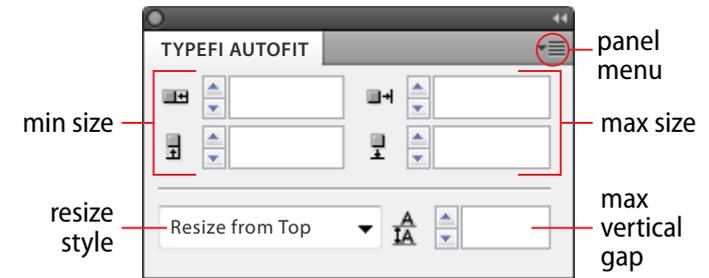
To remove a limit, delete the entered value or enter 0. To remove all limits from a selected object (including any AutoFit resize styles), choose **Remove Attributes** from the AutoFit panel menu.

Automatic resize styles

While you can manually fit a text frame to its content by double-clicking any frame handle, AutoFit-enabled frames dynamically resize as content changes. AutoFit can also automatically balance columns** for multi-column text frames.

* Regardless of the AutoFit minimum height, InDesign forces a minimum 3pt height for text frames.

** Balancing columns is automatic for InDesign CS4, but AutoFit uses the native feature in InDesign CS5, which is controlled by **Object > Text Frame Options > Balance Columns**.



There are four types of AutoFit resize styles:

- **Keep Frame Size** (default) does nothing and is equal to a normal InDesign text frame. Use this option to turn off automatic resizing.
- **Resize from Top** creates a 'soft bottom' text frame where the top of the frame remains fixed while the bottom of the frame snaps to fit all text in the frame.
- **Resize from Center** evenly distributes the height of the text frame above and below the center point while fitting all text in the frame.
- **Resize from Bottom** preserves the position of the bottom of the frame while the top of the frame snaps to fit all text in the frame.

AutoFit attempts to resize text frames to fit all contained text. If the frame is not constrained by an AutoFit maximum height limit, the frame may extend to the limit of the pasteboard. In addition, if the frame contains an inline object whose height is greater than allowed by the AutoFit or pasteboard limit, or if it contains text that is wider than a column (due to Hyphenation Settings, nonbreaking spaces, or the No Break character attribute), the frame will extend only to the last displayable line of text.

Removing resize styles

To remove a resize style, change the frame to **Keep Frame Size** or choose **Remove Attributes** from the AutoFit panel menu (the latter option will also remove any min or max size limits and any applied max vertical gap).

Maximum vertical gap ***

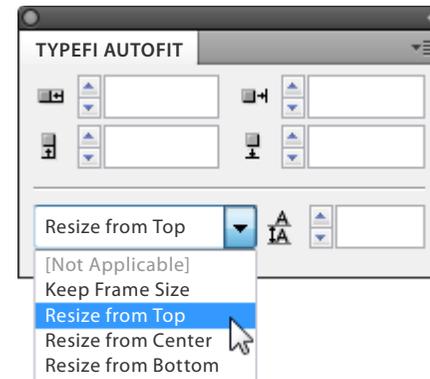
The maximum vertical gap provides additional padding, up to the value specified, between the top or bottom (or both) of the frame depending on its Vertical Justification options.

Publish v5 no longer calculates and automatically applies a maximum vertical gap when creating an AutoFit parent reference point on a text frame.

Scripting AutoFit

AutoFit fully supports scripting as part of Typefi Designer. You can use the object browser offered by the various languages to examine the objects and methods added by AutoFit.

*** The maximum vertical gap setting may be removed in a future AutoFit release.



Typefi Sections

Typefi Sections are similar to InDesign Sections you might use during manual page-compositions. They will assign particular master page designs to document pages; define the type of section content; allow activation of section fields; define the page numbering method; etc..

They define the order in which master pages will be used during automated page composition as Typefi Publish inserts content in the InDesign document that it creates. Additionally, Sections define the page numbering method used, and whether any Section Field data should be inserted (see [Section Fields, p. 96](#)).

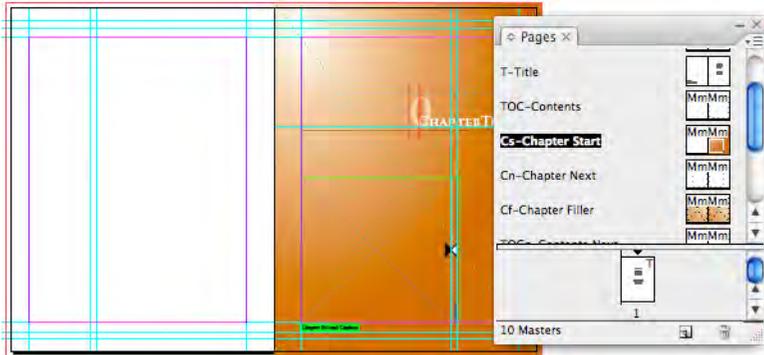
Designing a Section

Prior to creating a new section, review the InDesign design file and determine how you would construct a section. For example, imagine that each chapter in your publication is a book section. Each new chapter must start on a right hand page (or 'recto'), which means that the preceding chapter might require insertion of a filler page when it ends on a right hand page. This first page of a new chapter has its own significant design. The rest of the editorial pages that form part of the chapter will reference their own master page, and might have running headers or footers.

To create a section, consider how the section would be constructed using InDesign master pages you have already generated in your document.

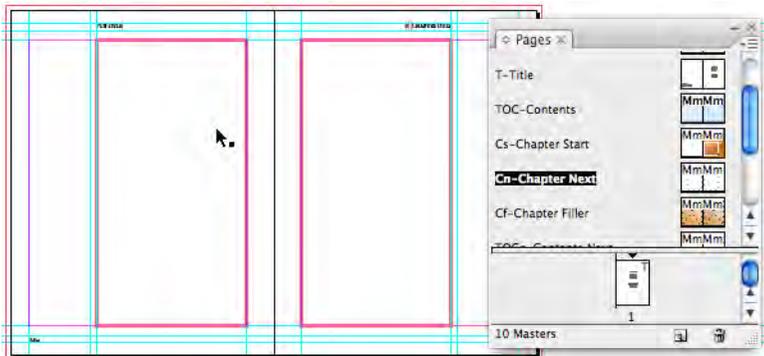
Let's look at some examples.

A chapter starts on a right hand page and has the **Cs – Chapter Start** master page applied to it. This master page contains a Fixed Element (see [Fixed Elements, p. 103](#)) for the graphic, and two Section Fields (see [Section Fields, p. 96](#)) are inserted for the Chapter Title and Number.



Cs – Chapter Start.

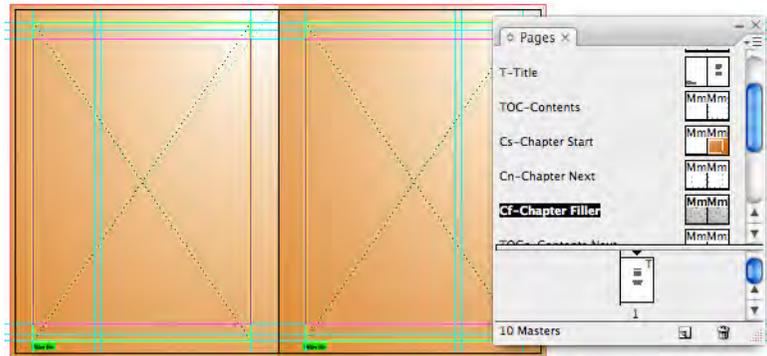
The rest of the pages in the chapter are created using the **Cn – Chapter Next** master page. These pages are repeated until there is no more content for the chapter. As a rule the rest of the pages must start on a right page.



Cn-Chapter Next.

The header on the left master page contains a Project Field (BookTitle) (see [Project Fields, p. 95](#)). The header on the right master page contains two Section Fields for the Chapter Title and Number. Both left and right master also include 'Main Story' frames.

- A single filler page is used immediately following the right page that starts a chapter, so that the textual pages will start on a right hand page and no blank pages appear in the document.
- A blank filler page is used when a textual section finished on a right page, as the next new chapter must start on a right page as well.



Cf-Chapter Filler.

Before defining a new Typefi section ensure that:

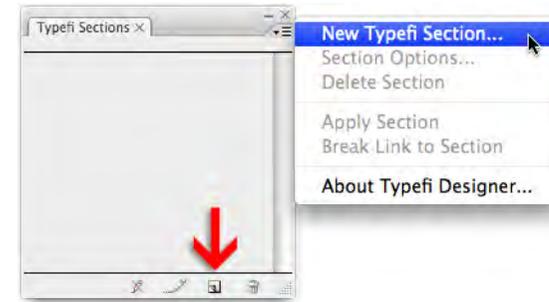
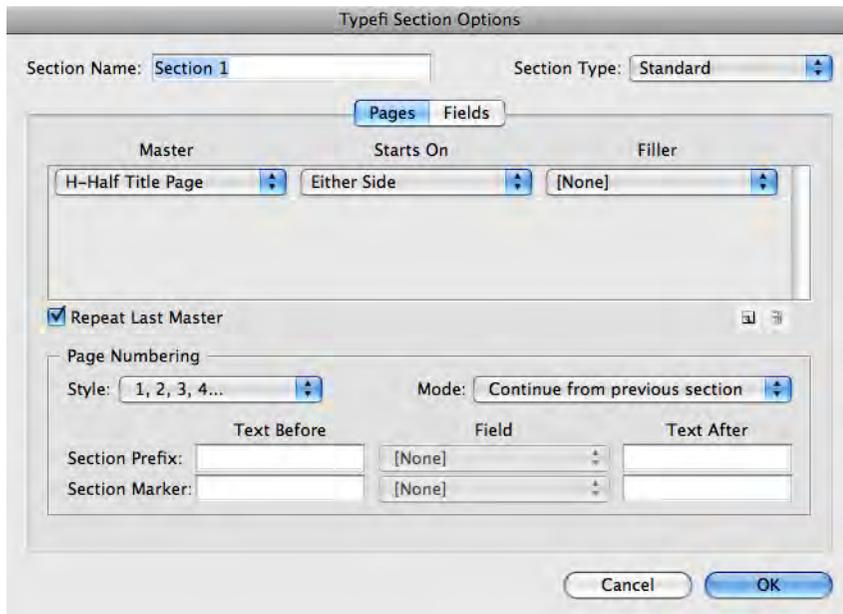
- All relevant Master Pages required for the creation of a Typefi Section are available. This includes filler masters.
- Masters that are part of a Standard Section used for core content run-in contain a 'Main Story' frame.
- Masters that form part of a Table of Contents Section contain a 'Table of Contents' frame.
- Fixed Elements are placed only on Master Pages that are used once per Section. (For instance, the first page of the chapters could contain a Fixed Element for placement of the graphic on that page.)
- Section Fields such as a ChapterTitle or ChapterNumber are inserted where relevant – for instance, in headers or footers and title pages.
- Project Fields are added where relevant – for instance, BookTitle on cover page, and in a footer.

New Typefi Section

To define a new Typefi Section:

- Select **New Typefi Section...** from the Typefi Sections panel menu (**Window > Typefi**).
- Alternatively click the **New Section** icon at the bottom of the panel.

The Typefi Section Options dialog box is displayed.



New Typefi Section...

Typefi Section Options

The **Typefi Section Options** defines how a section is named (**Section Name**), what type of section it is (**Standard** or **Table of Contents**), how pagination occurs (**Masters**), how the **Page Numbering** occurs, and whether any **Section Fields** are part of the section.

- Next enter the **Section Name** (see [Section Name, p. 73](#)).
- Set the **Section Type** (see [Section Type, p. 73](#)).
- Set the **Pages** settings.
- Enable or Disable **Repeat Last Master** option.
- Set the **Page Numbering** settings.
- Then click **Fields** and set the Field settings.
- Click **OK** to save the Section to the Typefi Sections Panel.

Section Name

The section name is a unique name. Use a meaningful name, as the author must start each Word document by inserting a Typefi Section. The Section Names are also referred to by name at the Typefi project level on the Typefi Publish Server (see [Starting a Project in the Typefi Systems Server Guide](#)).

Section Type

There are two Section Types, *Standard* and *Table of Contents*

- *Standard* sections are used for general page composition and content run-in.
- *Table of Contents* sections are used for the run-in of a Table of Contents.

Section Type vs. Content

The choice of section type establishes which type of content takes precedence in determining whether or not more pages must be inserted during page composition. A 'Standard' section contains the main body of the content; a 'Table of Contents' section contains the text that is generated for the Table of Contents. Typefi continues to add pages during page composition until the content type that has precedence has all been formatted and placed. (Usually it is one content type or the other, not both.)

Section Type vs. Typefi Frame Type

In order for Typefi Publish to be able to insert content and generate continuous pages, the Typefi Section defines the sequence in which master page designs are applied to document pages during composition. These master pages must contain 'Main Story' or 'Table of Contents' text frames. The main body of content fills Main Story frames and the Table of Contents text fills Table of Contents frames (see also [Typefi Frame types, p. 81](#)). The goal of the Typefi Engine is to add as many pages as necessary to have no text overset on the type of frame it is focused on.

When the Typefi Engine cannot find a Main Story frame in a Standard section type after it created a page from the possible master pages, the Engine stops the pagination of the section. Similarly, when the Engine cannot find a Table of Contents frame in a Table of Contents section, it complains and stops.

Standard section and Table of Contents frames

The first Master used by a Standard section may contain a Table of Contents frame. When the Typefi Engine encounters such a frame, it will trigger the Table of Contents creation and insert the text into that frame. Such a Table of Contents frame could be used for creation of a short section based Table of Contents for instance.

If the TOC text exceeds the frame length, the text becomes overset when:

- a) There is more TOC content, but no more Main Story content, which means the Engine stops adding more pages.
- b) There is more TOC content, but the master page designs used to run-in the overset text for the Main Story frames do not contain TOC frames.

Table of Contents Section and Main Story frames

A TOC Section First Master may contain a Main Story frame. When the Typefi Engine encounters such a frame, it inserts main body content added by the author into the Main Story frame following the Table of Contents Section insert. (Such a Main Story frame could, for example, be used when writing up an introduction at the start of each chapter.)

If the Main Story text exceeds the frame length, the text in this Main Story frame becomes overset when:

- a) There is more Main Story content, but no more Table of Contents content, which means the Engine stops adding more pages.
- b) There is more Main Story content, but the master pages used to run-in the overset text for the Table of Contents do not contain Main Story frames.

Pages

The next part of the Section Options dialog sets the order in which Master pages are used and repeated as content is flowed into the document.

There is no limit to the number of Master Pages that can be applied to document pages during page-composition. Master pages are used in a top-down order. This means that the first Master page listed is used first, then the next one and so on.

Using short section based TOCs requires publishing to a Book rather than a Single Document (see [InDesign Output Format in the Typefi Systems Server Guide](#)).

Assigning a Master Page to a Section

A New Typefi Section always defaults to the inclusion of the first Master page listed in the Pages Panel.

To assign Master Page(s) to a section:

- Select the **Master** to be used.
- Set the **Start On** preferences (see [Starts On, p. 75](#)).
- Set the **Filler** preference (see [Filler Master, p. 76](#)).

To assign more master page(s) to a section:

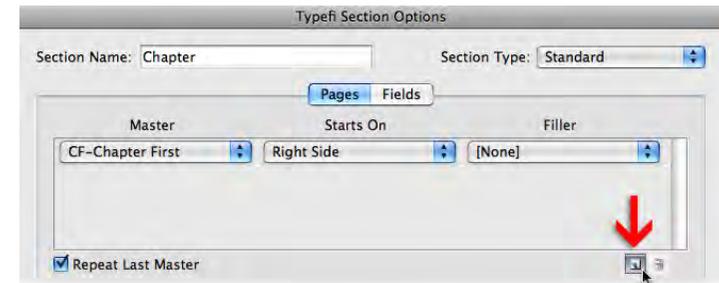
- Click the 'Add Master' button.
- Then set the 'Master page', 'Start On' and 'Filler' settings.
- Continue to click 'Add Master', until you've added all master pages that build a Typefi Section.

For instance, for a Front Matter section of a publication you might set the Pages settings to:

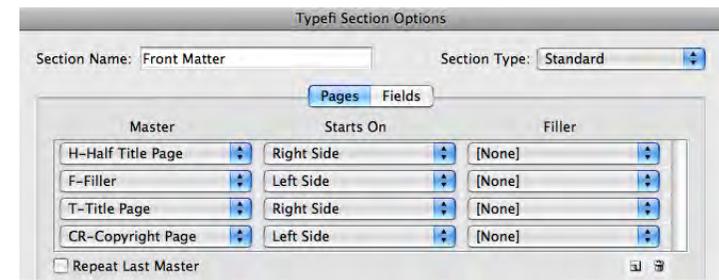
STARTS ON

Starts On determines whether the first page of a section starts on left or right side, or either side, and whether all pages in the master spread are used or not. See the following table for a detailed overview of the Start On options.

Starts On option	Description
Either Side	The first page of the section can start on either a Left or Right page and is determined by the last page of the previous section. For instance, if the previous section finishes on a Right page, then the section will start on a Left page.
Right Side	The first page of the section must be a Right page, regardless of whether the previous section ends on a Left or Right page. The Left page is not used and depending on further settings the Next Master might be used or a last used master repeated.
Left Side	The first page of the section must be a Left page, regardless of whether the previous section ends on a Left or Right page. The Right page is not used and depending on further settings the Next Master might be used or a last used master repeated.
Left Side, Use All pages	The first page of a section must be a Left page. Both Left and Right pages must be used. This means that the Right Page will be inserted whether there is content for it or not.



Adding more Master Pages to the Section definition



Front Matter Section using 4 different master pages during page composition.

Starts On option	Description
Either Side, Use All Pages	The first page of a section can start on either a Left or Right page depending on the last page of the previous section. Both Left and Right page must be used. This means that if the section starts on a Left page, the Right page will be added whether there is content for it or not (or vice versa).
Right Side, Use All pages	The first page of a section must be a Right page. Both Left and Right page must be used. This means that the Left Page will be inserted whether there is content for it or not.
Left Side, Use All pages	The first page of a section must be a Left page. Both Left and Right pages must be used. This means that the Right Page will be inserted whether there is content for it or not.

FILLER MASTER

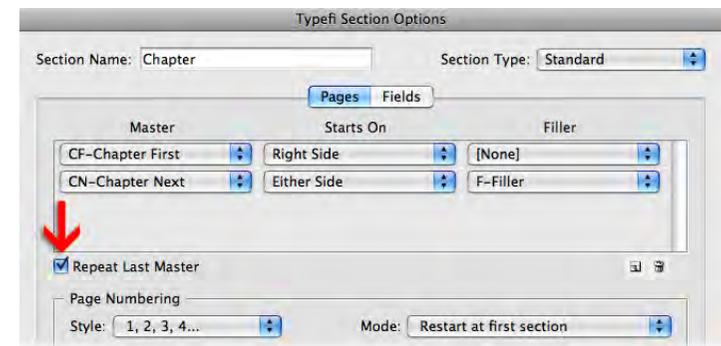
A **Filler Master** is a page that is inserted at the end of a section to ensure the following section can start on a required left or right hand page. For instance, if the next master must start on a Right page, and the previous page is a Right page, then a filler master would insert one additional page. The filler master can be a specifically designed master page or [None], which inserts a blank page. (Since [None] is the default, it can often be left unchanged).

Repeat Last Master

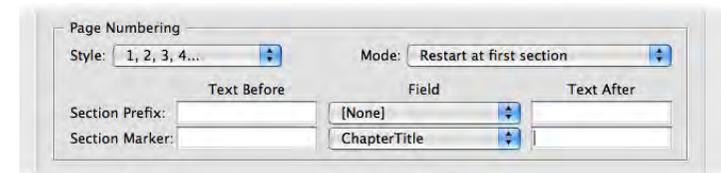
The **Repeat Last Master** option, when enabled, will continue to apply the last master page design during page composition as pages are added to the InDesign document that is being created. The Typefi Engine continues to add pages to the document until all content is inserted (see also [Section Type vs. Typefi Frame Type](#), p. 73).

Page Numbering

The **Restart Page Numbering** option determines whether the page number of a section starts at 1 or follows on from the previous section's page numbering. This setting automatically sets the **Start Page Numbering at** option in InDesign's *Numbering & Section Options*.



Repeat Last Master enabled.



Page Numbering settings in Section Options dialog.

Style

The Page Numbering **Style** defines the type of page numbering that is used for a Section. The default style is Arabic. Alternate numbering styles are **Roman numerals** (i, ii, iii etc.) and **Alphanumeric** (a, b, c etc.) in lower- and upper-case variants. The Page Numbering Style setting automatically sets the **Page Numbering > Style** option in InDesign's **Numbering & Section Options**.

To edit the Page Numbering Style for a section:

- Change the preferred numbering style from the **Style** drop-down.

Mode

The Page Numbering **Mode** is used to define at which stage automated page numbering is reset to "1".

CONTINUE FROM PREVIOUS SECTION

'Continue from Previous Section' means that the page numbering follows-on from the last page number of the previous section that is being published, regardless of which section is preceding the defined section. For example, you might have a document that contains a special Back Matter Section that needs to continue its page numbering from the last Chapter of the document.

RESTART AT FIRST SECTION

'Restart at first section' means that the page numbering is reset to '1' for the **first occurrence of the defined section** in the publication. Any sections following this section will continue their numbering sequentially, including another occurrence of the same type of section.

You could use this setting when the first chapter of a publication restarts its page numbering at 1 after the usual front matter, and the following chapters continue their page numbering,

RESTART AT EVERY SECTION

'Restart at Every Section' means that the page numbering is reset to '1' each time the defined section appears in the publication.

Due to a bug, the UI chooses "001, 002, 003" as default in the UI instead of "1, 2, 3". This is easily changed to the single digit style.

Section Prefix

The **Prefix** is a label that precedes the automatic page numbering in InDesign. The prefix value will also appear in a Table of Contents that includes page numbers.

- All of the Prefix data precedes the placement of the page-numbers.
- Text Before and Text After allows for the inclusion of literal text strings (any text you want).
- Field data is sourced from either a Section or a Project Field value.
- During page composition in InDesign the Prefix data is inserted as: “Text Before” + “Field data” + “Text After” + “Current Page Number”.

Section Marker

When a Section Marker has been included in a Text Frame on a Master Page (**Type menu > Insert Special Characters > Markers**) the Section Marker value added will appear in its place on the document pages.

- All of the Marker data entered populates the Section Marker data in InDesign’s Numbering & Section Options during page composition.
- ‘Text Before’ and ‘Text After’ allows for the inclusion of literal text strings.
- Field data is sourced from either a Section or a Project Field value.
- During page composition in InDesign the Section Marker data is inserted as: “Text Before” + “Field data” + “Text After”.
- **Prefix** and **Section Marker** values are non-changeable values once set by the InDesign Section Options. When you’re looking at using a changeable prefix or section marker in your designs, consider using a Section Field instead.

Assigning Section Fields to a Section

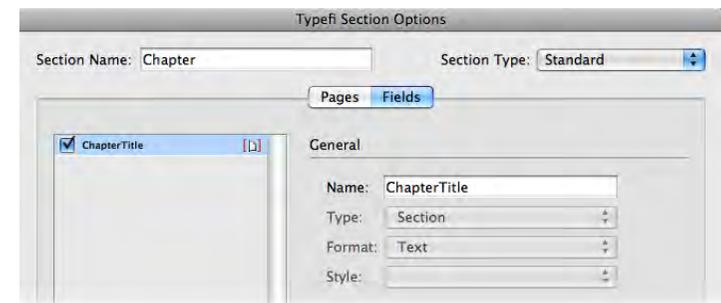
Any fields that are part of the Section must be included in the Section. Fields are discussed in depth in their own chapter (see [Typefi Fields, p. 94](#)).

To assign Section Fields to a Section:

- Click **Fields** in the Typefi Section Options dialog to display the Field section of the dialog.
- Enable those Fields that are to be used by the Section.

Or alternatively, if the Section Field has not yet been defined:

- Define a new Section Field by clicking the **New Field** icon.



Assigning Section fields to a Section

- **Name** the Field.

For all of the Fields assigned to the Section, the author is prompted to provide input data when inserting this element with Typefi Writer in Word.

DELETING A SECTION FIELD

The Field area in the Typefi Section Options can also be used to delete Section Fields. However, this only works for Section Fields you've just defined in Typefi Section Options. Fields added to the Section Fields list whilst the Typefi Section Options dialog is open are listed in Italics when they are not selected, so that they can be distinguished from any Fields defined earlier.

If any other Section Fields need to be deleted please refer to [Deleting a Typefi Field, p. 102](#).

To delete a field:

- Enable the field you've added earlier.
- Click the **Delete** icon at the bottom of the Fields list (see image).

Apply Section

You can apply Typefi Sections in InDesign if needed. The Apply Section command controls whether a section starts on a left or right page, but does not apply Master page designs to master pages that are part of a section. Typefi Section field behaviour can be tested in the InDesign document when a Section has been applied.

To Apply a Typefi Section:

- Show the **Typefi Sections** panel (**Window > Typefi** menu).
- Select the document page in the Pages panel that is to become the start page of a section.
- From the Typefi Sections panel menu choose **Apply Section**.
- The Typefi Section has now been applied.

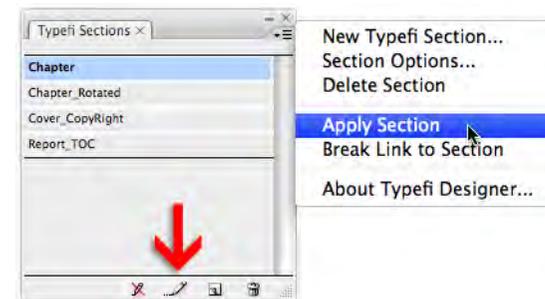
Break Link to Section

Breaking a Link to a Typefi Section, does not remove the InDesign Section marker that has been added to a section, nor does it alter the document pagination.

Fields may be used to store hidden meta-data that does not appear in the final output, but is required for the content and the XML into which the content is ultimately transformed.



Deleting selected field using the Rubbish Bin icon in the Fields list



Apply Section command and button

To Break the Link to a Section that has been applied:

- Show the **Typefi Sections** panel (**Window >Typefi** menu).
- Select the document page in the Pages panel that is the start page of a section.
- Select **Break Link to Section** from the panel's menu.
- Alternatively click **Break Link to Section** at the bottom of the Typefi Section panel.

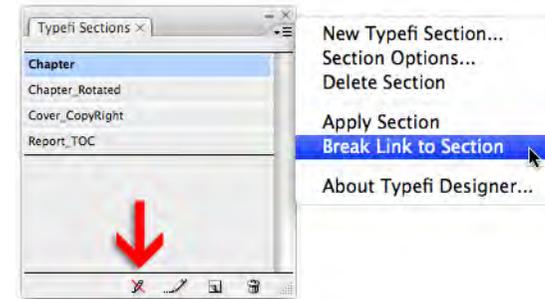
The pages in the section are now no longer associated with the Typefi Section.

Delete Section

To delete a Section from the Typefi Section Panel:

- Show the **Typefi Sections** panel (**Window >Typefi** menu).
- Select the Section that is to be removed.
- Choose **Delete Section** from the panel menu.
- Alternatively click the **Delete Section** icon at the bottom of the panel.
- Click **OK** to go ahead and delete the Section.

The Section will no longer be listed in the Typefi Sections panel and Applied Section references are removed from the document.



Break Link to Section.

Typefi Frames

Frames are containers for text or other objects, such as graphics. InDesign defines three types of content for frames: Text, Graphic and Unassigned. Typefi Frames are InDesign frames that contain additional attributes that turns them into frames that can dynamically receive content during page-composition.

Typefi Frame types

The **Typefi Frames** panel provides an easy way to designate InDesign text and graphic frames as Typefi Frames and to add additional parameters to control how those frames should behave when paginated.

There are four types of Typefi Frames:

- Main Story
- Table of Contents
- Element Image
- Element Content

To help distinguish Typefi Frames from InDesign frames, the borders of the frames are colored with a 2.5 pt stroke.

Frame Type	
Main Story	Red
Table of Contents	Dark Blue
Element Content	Cyan
Element Image	Yellow

When Typefi Publish flows content into Typefi frames, existing content that appears in these frames is automatically replaced during population of the frames at time of page composition.

Borders only display when **View > Show Frame Edges** is enabled, **Object > Overprint Preview** is disabled and the document **Screen Mode** is set to **Normal**. The default Typefi Border can be altered by editing the Typefi Border preferences (see [Typefi Borders, p. 150](#))

Main Story

Main Story frames are the more common Text Frame type seen in Typefi Templates. Main Story frames are placed on Master Pages used by Typefi Sections.

Typefi publishes content into Sections and uses the Master Pages defined by the sections during the composition process to create document pages. Typefi Publish automatically runs content into Main Story frames, creating new document pages and filling these frames, until all content is placed according to the rules defined in a **Standard Section** (see [Typefi Sections, p. 69](#)).

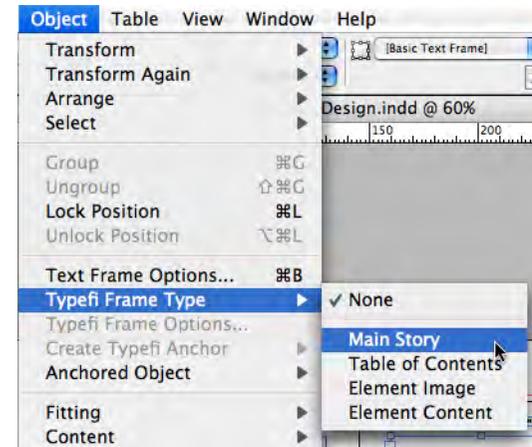
An exception applies for a **Table of Contents (TOC) section** that contains a Main Story frame on only the first page of the section and not the following pages. In this case the main story content only runs into the first page of the section, even if the TOC runs over multiple pages. However, if a TOC section does include Main Story frames on following pages, then the Typefi Designer plug-in will automatically run main story content into following pages for the length of the TOC section.

Creating a Main Story frame

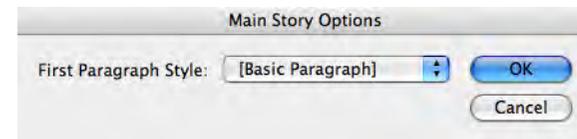
To create a Main Story frame:

- Open the Master page and insert a normal InDesign Text Frame on the left and right master.
- Select the Text Frame with the selection tool.
- Choose **Typefi Frame Type > Main Story** from the **Object** menu.
- Alternatively right-click the frame.
- Select **Typefi Frame Type > Main Story** from the contextual menu that displays or select **Main Story** from the **Typefi Frames** panel **menu**.

The **Main Story Options** prompts you to select the First Paragraph Style.



Typefi Frame Type.



Main Story Options.

First Paragraph Style

With the **First Paragraph Style** set to either **[Basic Paragraph]** or any Paragraph Style, the first paragraph style that appears in the Main Story thread is formatted using the defined first paragraph style, regardless of the style assigned by the author for that first paragraph.

The First Paragraph Style option is a useful way to apply drop caps or special first paragraph formatting to the content without having to specifically set that style at content level. This can enhance the reuse of that content. For example, when content is reused for web-purposes, it might be irrelevant that the first paragraph was formatted with a drop cap originally.

Setting First Paragraph Style to **[None]** gives the author full control over the text formatting. (This is the default setting, so often doesn't need changing.)

- Select the preferred **First Paragraph Style**.
- Click **OK**.

The Main Story Frame Type has now been applied and is distinguished by its thick red frame edge.

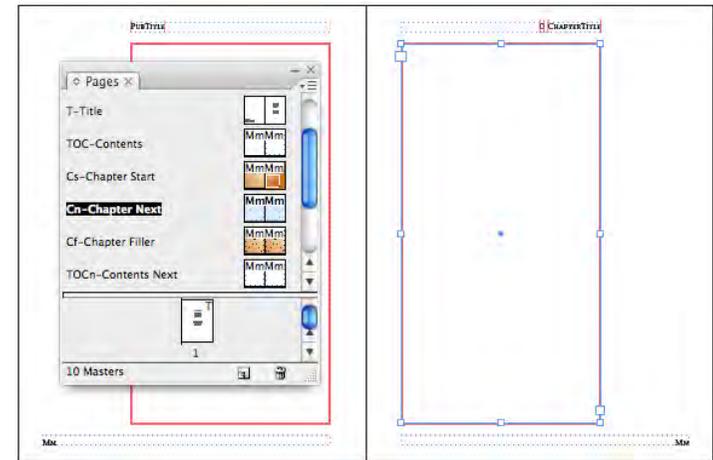
Table of Contents

Table of Contents (TOC) frames are special text frames designed specifically to be populated with table of contents data. The data that fills the TOC frames is based on the InDesign Table of Content Style assigned to the frames. Pagination of TOC frames occurs after all other pages have been composed. This is because all of the source data that is going to be used to populate the TOC frames must be laid out in the paginated document first so that their assigned page location is known.

TOCs may be created at publication or section level. Publication level TOCs source their content from all sections of a publication. Section level TOCs source their content from the section to which they belong.

About section level TOCs:

As InDesign does not permit a TOC to be targeted at a particular page range, the preferred method for creating section level TOCs is to ensure each section is produced as an individual InDesign document that ultimately will be bound into a book. To automatically compose multiple sections and build section level TOCs use the **Create Book** option in the **Job Options** for page composition (see also **New Job Options in the Typefi Systems Server Guide**).



Main Story frame property applied to Text Frames on Left and Right Ch_ChapterNext page.

Like Main Story frames, Table of Contents frames are placed on master pages that are used as part of Sections.

Table of Contents Styles

Table of Contents are always based on InDesign's native Table of Contents Styles.

Start by creating one or more Table of Contents Styles as part of your InDesign template prior to assigning the Typefi Frame Type - Table of Contents to a Text Frame.

To create a Table of Content Style in InDesign:

- Select **Layout > Table of Contents Styles**.
- Click **New**.
- **Name** the Style (e.g. TOC_Figures).

Under the **Other Styles** list, all of the paragraph styles used in the document are listed. From this list:

- Select any styles that are applied to content you'd like to see extracted into the fully populated TOC frame.
- Click **Add**, to add these styles to the Include **Paragraph Styles** list.

Using the Table of Contents Styles dialog you can set additional settings for formatting of the TOC data that is extracted from your document pages during page composition, such as the position of the page number, the style with which particular data is formatted and the level. For full details on all of the options and settings available for creation of Table of Contents Styles in InDesign, please refer to InDesign's Help menu.

If you've created separate Paragraph Styles for formatting of the various content levels in your Table of Contents, consider placing these in a separate Style Group that has Export To TemplateXML disabled. None of the TOC paragraph styles need to be accessible in the Typefi Writer in Word.

When used within TOC sections (see [Section Type, p. 73](#)), Typefi Publish automatically generates the table of contents, creating new Table of Contents frames and pages until all TOC content is placed. This happens after all other Standard sections are paginated.

The settings in the Table of Contents dialog that allow you to choose 'Replace Existing Table of Contents' and 'Include Book Documents' are NOT used when the TOC frame gets updated by the Typefi process, however they would be used if called upon by a script, or by the InDesign User Interface.



Bk_Contents Table of Contents Style preset created for the daVinci project in InDesign.

Note: Because TOC sections are created as the last step in the process, Typefi Publish forces the first Standard section following a TOC section to start on the right side and does not allow pages to 'shuffle'. This may result in a filler master being inserted after a TOC section.

Creating a Table of Contents (TOC) frame

To create a TOC frame:

- Open the Master page and insert a normal InDesign Text Frame.
- Select the Text Frame with the selection tool.
- Choose **Typefi Frame Type > Table of Contents** from the **Object** menu..
- Alternatively right-click the frame and select **Typefi Frame Type > Table of Contents** from the contextual menu that displays. Alternatively select **Table of Contents** from the **Typefi Frames** panel **menu**.

The **Table of Contents Options** dialog prompts you to select the InDesign Table of Contents Style on which to base the Typefi TOC.

- Select the appropriate InDesign TOC style.
- Click **OK**.

The Table of Contents Frame Type is applied and is recognizable by its thick dark blue frame border.

About TOC frames

A TOC frame can also be included on a normal master page in the document, and can share that page with a Main Story frame. This permits inclusion of smaller TOCs throughout a document. For instance, you could use this to include a section-based TOC on the first page of a new section. The section itself doesn't need to be defined as a TOC (see also [Section Type, p. 73](#)). Such a TOC frame will not thread onto further pages if the TOC becomes overset on the first page of the section (The TOC frame will thread to a next page of a section **if there is another page in the section that uses a TOC frame for the same TOC style**). Within a normal section, the Engine will not add pages just because there is an overset TOC frame). InDesign does not permit a TOC to be targeted at a particular page range, so the preferred method for creating section-level TOCs is to ensure they are separate documents that ultimately will be bound into a book. You can select a **Book**

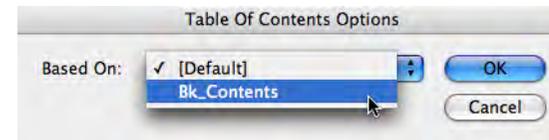


Table of Contents Options.

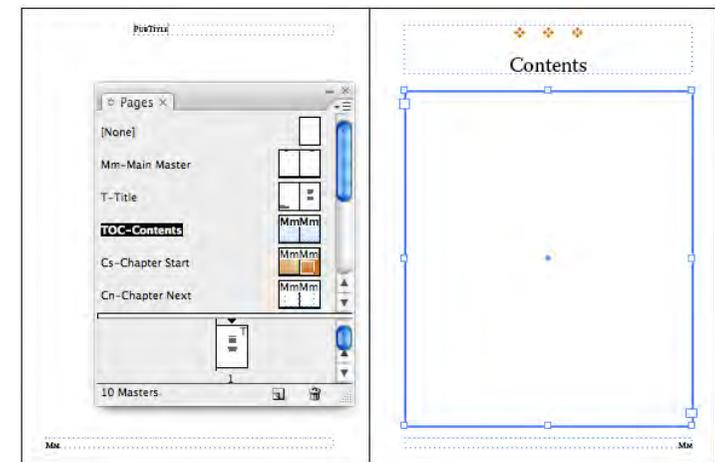


Table of Contents frame property applied on Text Frame on TOC Contents master page.

output from the Job Options in the Server (*see also [New Job Options in the Typefi Systems Server Guide](#)*).

Use multiple TOC frames to generate different TOC types such as Table of Tables, Table of Figures and so on. Due to the limitations of InDesign's TOC styles, these must currently exist as separate frames. Although additional TOCs can be appended to the main TOC, this would require a Typefi feature enhancement to be added to your project in the form of a **script**.

Element Image

Element Image frames are placeholder graphic frames used within Typefi Elements (see [Typefi Elements, p. 103](#)) and provide a number of options to control the fitting and placement of images. For an Element Image frame to become active it must become part of an element and it must have an image associated with it from content.

Creating an Element Image Frame

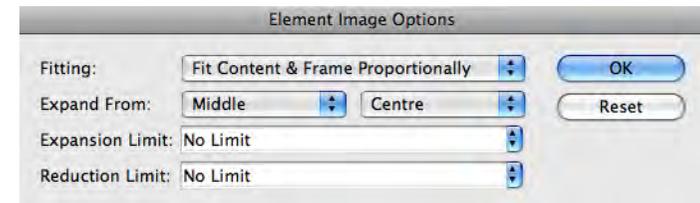
To create an Element Image frame:

- Select an InDesign Graphic Frame, created with one of the frame tools, with the selection tool.
- From the **Object** menu select **Typefi Frame Type > Element Image**.
- Alternatively right-click the frame and select **Typefi Frame Type > Element Image** or select **Element Image** from the **Typefi Frames** panel menu or select **Element Image** from the **Typefi Elements** panel menu **Typefi Frames** submenu.

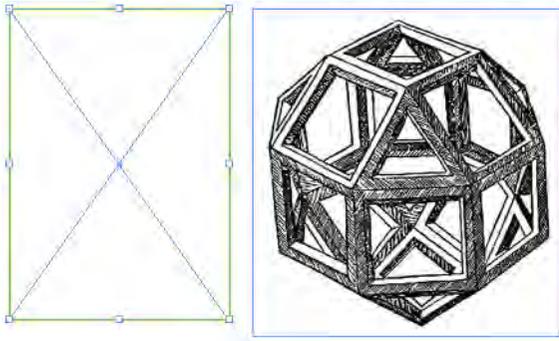
The **Element Image Options** dialog prompts you to select the image expansion and fitting options.

- Select the appropriate **Fitting** setting.
- Set the **Expand From** option.
- Set the **Expansion** and **Reduction Limits**.
- Click **OK**.

An Element Image frame can also be used directly on a master page. In that case, an inline image from the content of the main story could be placed in that frame rather than being placed as an InDesign inline image (a feature since the first version of Typefi).



Element Image Options



Element Image Frame (left) and Original Image Size (right)

The Element Image Frame Type has now been applied and is distinguished by its 2.5pt Yellow frame border.

Element Image Options

Let's review the Element Image Options using a few examples.

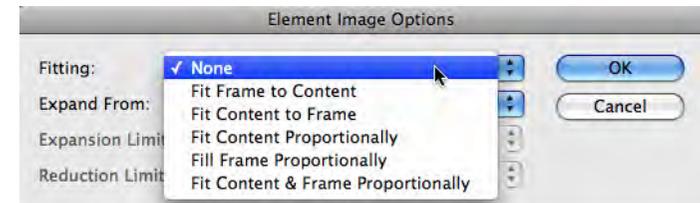
Fitting

The fitting options automatically adjust the size of an image or its frame when placing a graphic into the element image frame during page composition.

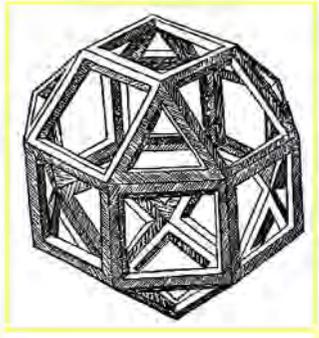
Frame resize behavior in turn may also be dependent on the inclusion of minimum or maximum frame width and height settings applied to the frame by AutoFit.

FIT FRAME TO CONTENT

'Fit Frame to Content' resizes the Element Image frame to the full image size, therefore the image is always placed at 100%.



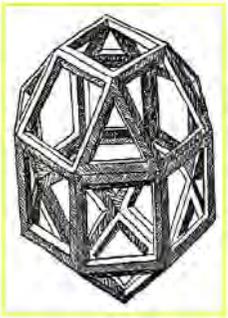
Fitting Options



Fit Frame to Content

FIT CONTENT TO FRAME

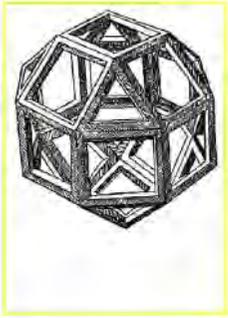
'Fit Content to Frame' resizes the image to fit in the Element Image frame. No frame resizing occurs. Where the image proportion doesn't match the frame proportion the image is placed non-proportionally and may appear stretched.



Fit Content to Frame

FIT CONTENT PROPORTIONALLY

'Fit Content Proportionally' resizes the image to fit in the Element Image frame. The image is resized proportionally. No frame resizing occurs, perhaps resulting in part of the frame appearing empty if the proportions of the image differ from those of the frame.

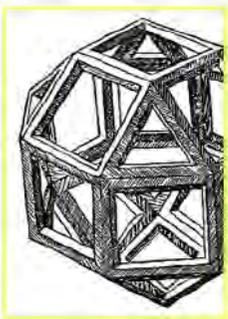


Fit Content Proportionally

(This setting could be used where image frame sizes must remain consistent throughout the page composition and no part of the image may be masked. This setting is suitable for instances of illustrative or technical graphics that must be placed without cropping.)

FILL FRAME PROPORTIONALLY

'Fill Frame Proportionally' resizes the image to fill the entire Element Image Frame. The image is resized proportionally. No frame resizing occurs, often resulting in part of the image being masked out.

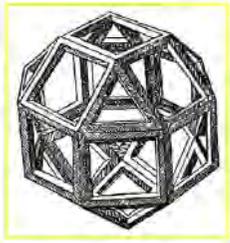


Fit Frame Proportionally

(This setting could be used where image frame sizes must remain consistent throughout the page composition and part of the image may be masked. It is a setting normally used for photo placements.)

FIT CONTENT AND FRAME PROPORTIONATELY

'Fit Content & Frame Proportionally' starts by resizing the image to fit in the Element Image frame. (The image is resized proportionally and displayed without cropping.) Immediately following the image resizing, the frame is reduced in size and fitted to the content.

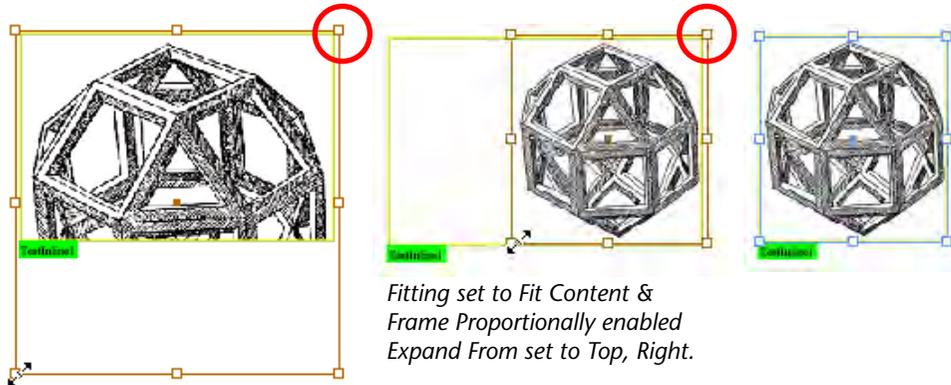


Fit Content & Frame Proportionally

Expand From

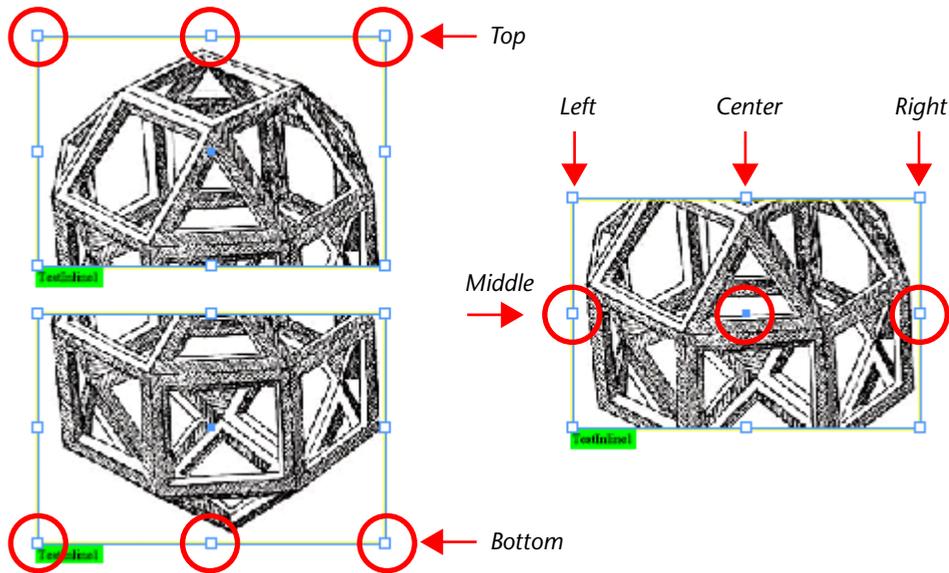
This option allows project designers to automatically align imported graphics to any edge of an Element Image frame.

Select the side and corner of the image frame that will act as the reference points for any size change of the image. These are 'frozen' and the frame will resize from those points.



Expand From example.

For example (see graphic above) when fitting is set to Fit Image to Frame, setting Expand From to **Top | Right**, causes the Bottom | Left corner of the image to resize to the frame, and then the frame resizes to match the new graphic size.



Expand From settings.

Setting Expand From to **Middle** causes the corners to move equally in opposite directions. For example, selecting **Middle | Center** will cause the image or frame to shrink or grow precisely from the center point of the image or frame.

Top, **Middle** and **Bottom** generate horizontal positioning, and **Left**, **Center** and **Right** generate vertical positioning.

Expansion Limit

The expansion limit sets the maximum scaling percentage allowed for an image during fitting to the Element Image frame. The minimum value is 100%. Select a preset expansion limit from the pop-up list, type your own percentage, or choose **No Limit** to ignore this option.

Reduction Limit

The reduction limit sets the minimum scaling percentage allowed for an image during placement in the Element Image frame. The maximum value is 100%. Select a preset reduction limit from the pop-up list, type your own percentage, or choose **No Limit** to bypass this option.

To apply absolute height or width limits, for example 1.25 inch wide, use the Typefi AutoFit panel.

Element Content

Element Content frames are placeholder Text Frames used within Typefi Elements.

Note: Fields placed inside Element Content frames are deleted during page-generation, and are therefore best placed inside normal InDesign Text Frames.

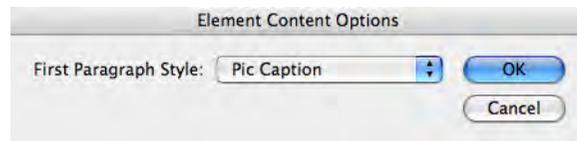
Creating an Element Content Frame

To create an Element Content frame:

- Select the Text Frame with the selection tool.
- From the **Object** menu select **Typefi Frame Type > Element Content**.
- Alternatively right-click the frame and select **Typefi Frame Type > Element Content** or select **Element Content** from the **Typefi Frame** panel menu or select **Element Content** from **Typefi Element** panel menu, **Typefi Frame Type** submenu.

The **Element Content Options** dialog prompts you to select the **First Paragraph Style**. This is the paragraph style that is to be applied for the very first paragraph that populates the Element Content frame.

- Select the **First Paragraph Style**.
- Click **OK**.

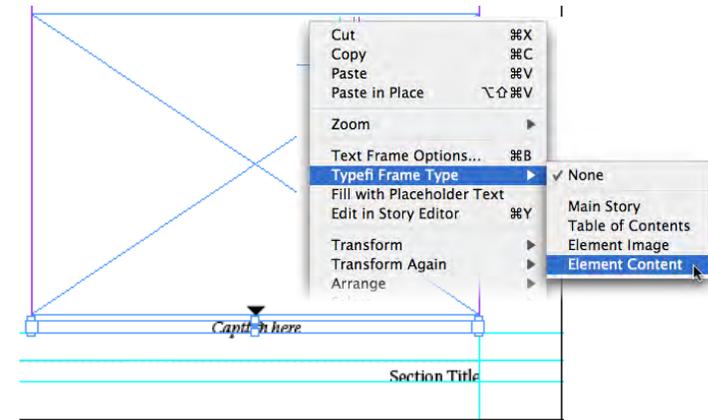


Element Content Options.

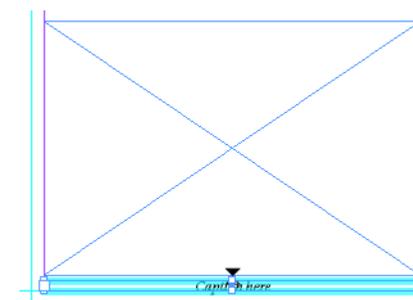
First Paragraph Style

Similar to the Main Story frame, the **First Paragraph Style** setting overrides the style of the first paragraph that appears in the content. You can use this in the same way to apply specialized formatting to the element content regardless of the actual paragraph style applied by the author in Typefi Writer.

(For example, you could use this setting to automatically apply a first paragraph heading style or a special formatting to sidebar content without the author needing to set the style manually in Typefi Writer.) As with the Main Story frame option, this enhances content reuse without having to change markup.



Element Content Frame.



Element Content Frame with default border color(cyan) property applied to Text Frame (bottom).

The Element Content Frame Type has now been applied and can be distinguished by its thicker cyan frame edge.

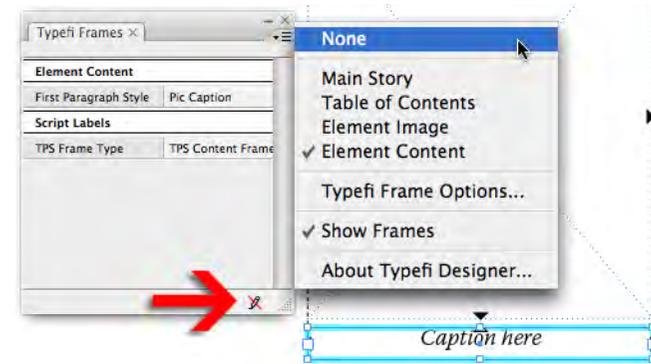
Clearing Typefi Frame Type

Note: the Script labels displayed in the Typefi Frames panel are used by scripts to read information about Typefi Frames, Typefi Elements and Typefi Anchors.

To clear a Typefi frame property from an InDesign frame:

- Select the frame with the selection tool.
- Choose **Typefi Frame Type > None** from the **Object** menu.
- Alternatively right-click the frame and select **Typefi Frame Type > None** or select **None** from the **Typefi Frames** panel menu or select None from the **Typefi Elements** panel menu **Typefi Frames** submenu.

You can also click the **Clear Frame property** icon at the bottom of the **Typefi Frames** panel.



Clearing Typefi Frame Property.

Typefi Fields

Typefi Fields are content placeholders that carry values assigned by the author at the element, section or project level. The text that populates fields is automatically inserted into each instance of that field that appears in the InDesign document during page composition.

Fields can exist on document title pages; as part of a running section header; or in a Typefi Element. When determining whether a field is relevant for usage in your InDesign template, look for text that repeats itself throughout a layout. For example, you can use them for chapter titles, chapter numbers, project names, dates, document references, author name, ISBN and so on.

The following table provides some examples of Typefi Field uses:

Field Type	Scope	Sample uses	Value supplied from
Project	Field value can be used across all pages and sections in the current project.	Document title, author name, customer name, reference number, publication date, product name, part number	Project home page on Typefi Server or Inserted during Typefi Print... from Word.
Section	Field value can be used across all pages in the current section.	Part title, chapter title, section number, component name	Section Insert in Typefi Writer
Element	Element Fields for the inclusion of content in an element.	Captions, copyright data, figure number, date	Element Insert in Typefi Writer

Project Fields

A **Project Field** is a field in which the value remains the same throughout all sections of a publishing project, regardless of the section in which it might appear.

Imagine you are working on a publishing project that is part of a series of publications. Each publication would have different titles, subtitles and author details.

When we look at the title page design for the publication, several potential Project Fields could be identified:

- Publication title - this text is repeated on the left page of the general content pages for the publication.
- Publication subtitle - this field text doesn't repeat, but in a series of publications, this content could be entered at project level, so that during running of the job this text is automatically inserted.
- Publication author - this field also doesn't repeat. However, in a series of publications, this content could be entered at project level similar to the Publication subtitle.
- Publisher – this field could repeat on the copyright page.
- Inside cover contains copyright information. The copyright year and owner could be set as a Project Field.

Create Project Field

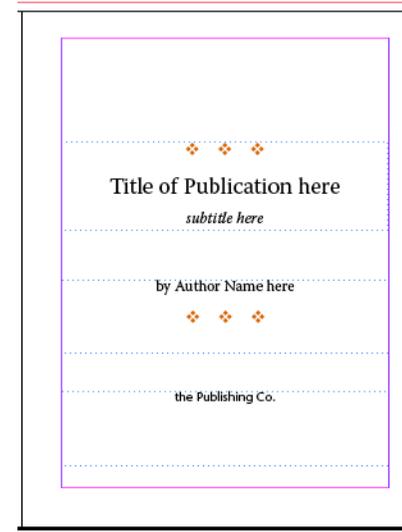
To create a New Project Field:

- Display the **Window > Typefi > Fields** panel.
- Select **New Field** from the panel menu. Alternatively click the New Field Definition icon at the bottom of the panel.

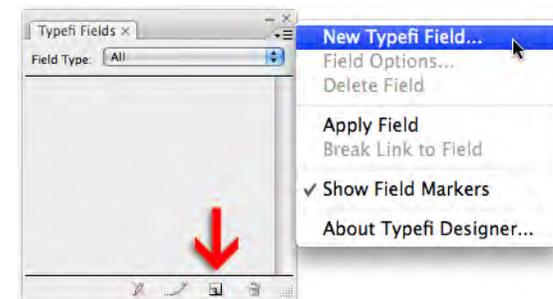
The **Field Options** dialog is displayed.

- Enter a unique **Name**.
- Set the **Type** to Project.
- Click **OK** to create the new Project Field.

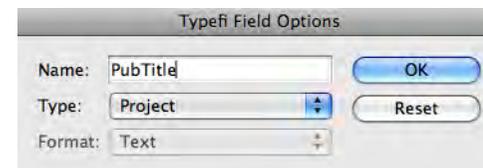
The Project Field is added to the Typefi Fields panel. In addition, any Project Fields that you add will appear as part of the Project Settings on the Typefi Server (*see also Starting a Project in the Typefi Systems Server Guide*).



Title page design for daVinci project.



New Field.



Field Options dialog.

Section Fields

While Project Field values remain the same throughout a publication (unless they are manually changed at 'Run Job' level), **Section Fields** only retain their value throughout a single Typefi Section (see also [Typefi Sections, p. 69](#)).

Section Fields, in addition to text, can include counters. **Counters** are useful for tracking chapter numbers, or could be used as a prefix for figure numbers that belong to a certain chapter number. The value (number) of the counter does not need to be explicitly defined within the content by the Author. Instead, counters are automatically updated by the Typefi Designer plug-ins during page composition.

Note: When editing the published InDesign file post page-composition: Counters are updated automatically only when new Typefi Sections are inserted. Insertion of standard InDesign sections will not result in Counters being updated. This is because Section Fields are only associated with Typefi Sections.

Regardless of the order in which Sections are published through Typefi Publish, Counter Fields will count sequentially.

Examples of text that may be formatted using Section Fields include:

- Chapter Number
- Chapter Title

In some cases chapters might form part of an InDesign 'book'. Each part name or number could also be a Section Field.

Create Section Field

To create a new Section Field:

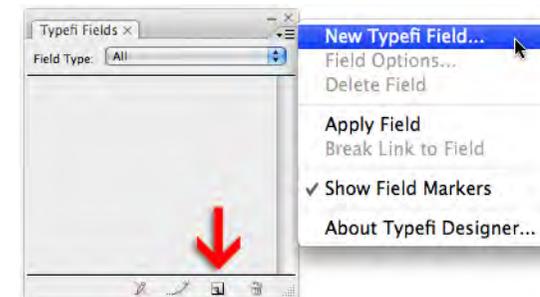
- Display the **Window > Typefi > Fields** panel.
- Select **New Field** from the panel menu. Alternatively click the New Field Definition icon at the bottom of the panel.

The Typefi Field Options dialog is displayed.

- Enter a unique **Name**.
- Set the **Type** to Section.
- Set the **Format** to either Text or Counter.



Potential Section Fields.



Create New Field.

- Click **OK** to create the new Section Field.

Field Format settings define the field's data type. Section Fields have their **Format** set to either Text or as a Counter.

Text

Fields with Format set to 'Text' are populated with literal text data provided by users at Section level.

To create a text-based Section Field:

- Set **Format** to Text.
- Click **OK** to accept the setting and create the Section Field.

The New Section Field is added to the Typefi Fields panel.

Counter

Fields with Format set to 'Counter' are populated with numbers automatically. The numbering mode is defined as part of the Typefi Section definition (see [Typefi Sections, p. 69](#)).

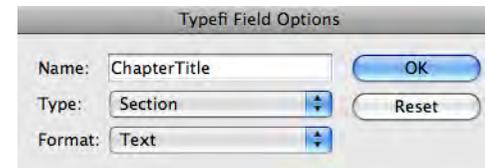
A Counter Field carries a numerical value that is incremented automatically as page-composition inserts each Typefi Section. For example, consider a project job option set to publish a number of chapters that are each generated as an individual section in the publication. As each section is compiled, the chapter number is automatically incremented. If you opt to alter the order of sections at Run Job level, the numbering will adjust accordingly.

To create a Section Field that works as an automatic counter:

- Select **Counter** as the **Content Type** for the Field.
- Click **OK** to accept the setting and create the Section Field.

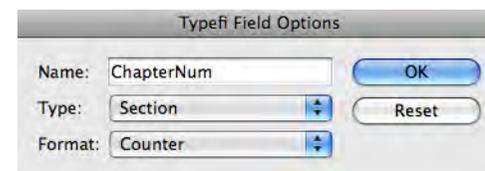
The new Section Field is added to the Typefi Fields panel.

Note: Section Fields can also be defined as part of the Typefi Section (see [Typefi Sections, p. 69](#)).



The screenshot shows a dialog box titled "Typefi Field Options". It contains three rows of controls: "Name:" with a text input field containing "ChapterTitle", "Type:" with a dropdown menu set to "Section", and "Format:" with a dropdown menu set to "Text". To the right of these controls are two buttons: "OK" and "Reset".

Field Options: Section Field with Format set to Text.



The screenshot shows a dialog box titled "Typefi Field Options". It contains three rows of controls: "Name:" with a text input field containing "ChapterNum", "Type:" with a dropdown menu set to "Section", and "Format:" with a dropdown menu set to "Counter". To the right of these controls are two buttons: "OK" and "Reset".

Field Options, Section Field with Format set to Counter.

Element Fields

An **Element Field** is a Field that is used by a Typefi Element. In contrast to Section Fields, Element Fields do not support counters and are given a value during element insertion. The content author is prompted to enter a Field value when an Element containing Fields is inserted with the Typefi Writer in Word.

As the elements are inserted during the automated pagination the Element Fields are filled with the author-assigned values.

Create Element Field

To create a New Element Field:

- Display the *Window > Typefi > Fields* panel.
- Select **New Field** from the panel menu. Alternatively click the New Field Definition icon at the bottom of the panel.

The *Typefi Field Options* dialog is displayed.

- Enter a unique **Name**.
- Set the **Type** to *Element*.

The Format for Element Fields is automatically set to Text.

- Click **OK** to apply the settings and create the New Element Field.

The New Element Field is added to the Typefi Fields panel.

Note: Element Fields can also be defined as part of the Typefi Element (see [Assigning Element Fields to an Element](#), p. 112)

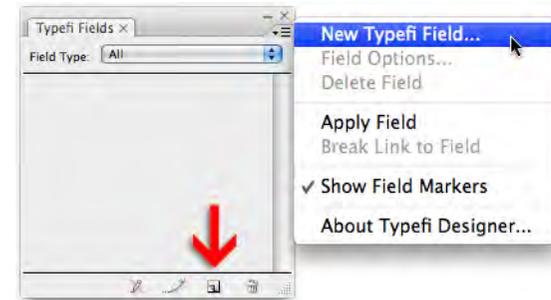
Applying Fields

Fields are always inserted in standard InDesign text frames and never in Typefi Frames, as any pre-existing content in Typefi Frame types is replaced by actual content during the page-composition process.

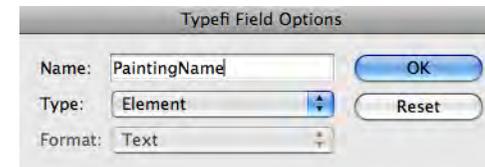
Apply Field with text highlight

When applying a field to highlighted text, the text becomes the default data value for this Field.

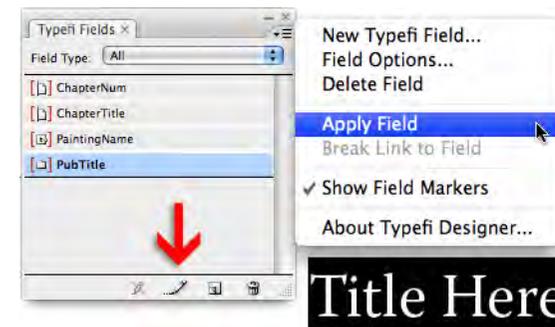
Note: When including an Element Field as part of a Typefi Element, ensure that the Text Frame is a normal InDesign Text Frame and not a Typefi Element Content frame. Typefi Frame content is totally refreshed during the pagination process, thereby removing the field markers.



Create New Field.



Field Options: Element Field with Text as Content Type.



Applying Selected Field.

To apply a field to highlighted text inside a text frame:

- Highlight some text with the Type tool.
- Select the Field Name in the Typefi Fields panel.
- Select **Apply Field** from the panel's menu or click **Apply Selected Field** at the bottom of the Typefi Fields panel.
- Alternatively double-click the Field Name to add Field Markers around the highlighted text.

Field Markers appear as red square brackets around the highlighted text and indicate that the Field Definition is applied to the text. If you opted to apply a field at the text cursor insertion point, without highlighting text, you will see the Field Name surrounded by Field Markers instead.

To display **Field Markers**:

- Enable **Show Field Markers** option from the Typefi Fields panel menu.

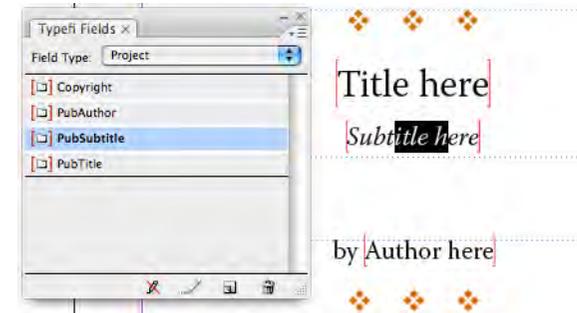
During page composition the template text marked up with Project Field Markers is replaced by the assigned Project Field values. When publishing a job from the Typefi Server the field values are picked up from the Project Settings (*see also 'Starting a Project' in the Typefi Systems Server Guide*). When printing a job from Typefi Writer, the values are picked up from the values entered in the Typefi Print dialog (*see also 'Publishing from Word' in the Typefi Systems Server Guide*).

Apply Field without text highlight

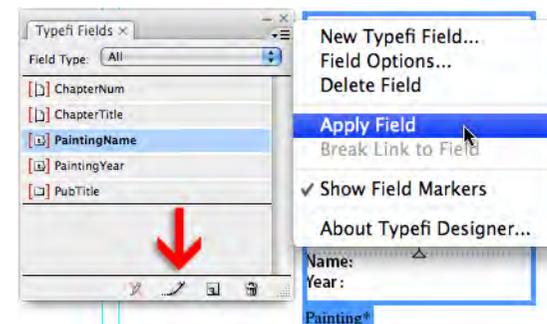
To insert a field in a text frame without having existing text highlighted:

- Place your cursor at the insertion point in the Text Frame.
- Select the Fieldname of the Field in the Typefi Fields panel.
- Select **Apply Field** from the panel's menu.
- Alternatively double-click the Field name to add Field Markers around the highlighted text or click **Apply Selected Field** at the bottom of the **Typefi Fields** panel.

For example, let's assume the Element design requires the author to enter the name of a painting, as well as the date and painter's name. To prompt the author for data entry when the Element is inserted into the Word document with the Typefi Writer, you could assign three Element Fields as part of the Element



Typefi Fields applied.



Apply Element Field example.

definition. One Element Field is used for the name of the painting; a second field for the date; and a third for the painter's name.

An InDesign Text Frame can contain multiple Fields as well as pre-defined text. The Element example here contains a Text Frame that not only fills two different Fields with text but also pre-populates the Text Frame with the words 'Name' and 'Year'. When the author inserts the Element in Word using Typefi Writer a prompt will appear asking the author to assign values to 'PaintingName' and 'PaintingYear' fields.

Field synchronization

When you change the content of any one Field, Typefi Designer updates all other instances of that Field throughout the document. You can use this feature to test how your document will react to certain Field values. Will a lengthy chapter title prove too long for the current page header design? If so, you can either redesign the page header or use AutoFit (see [Typefi AutoFit, p. 65](#)) to adjust the frame as needed.

Synchronizing Project Fields

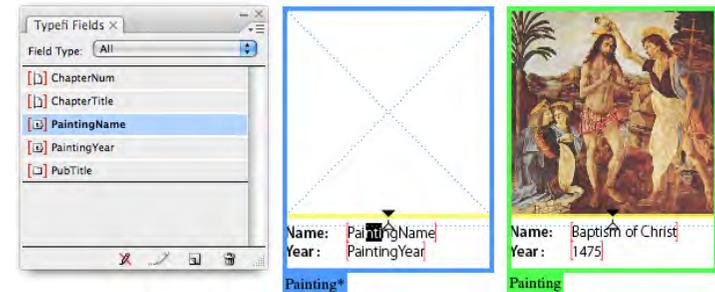
When a Project Field value is amended in a text frame that is positioned on a Master page, the field value is updated on all other master pages on which it appears. However, if document pages contain overridden text frames, the original project field values are retained.

Project Field values that reside within overridden text frames on document pages change globally across all document pages when their value is amended.

Synchronizing Section Fields

Where a Section Field value is amended in a text frame that is positioned on a Master page, changes are applied only to occurrences of the Section Field within the Master Spread pages.

Section Field values (when changed within an overridden text frame on a document page) only change on document pages that are part of the section to which the overridden text frame belongs.



Element with two Element Fields (left) and example pagination (right).

When Section Counter fields are amended, a follow-on effect will occur in those Sections following it, as the counter values are set automatically.

Synchronizing Element Fields

Element Field values that are changed are only updated within the Element to which they are applied. If the Element contains nested Elements, and the field repeats within these nested Elements, the nested Element field values update as well.

Breaking Links to Fields

To Break the Link to a Field that has been applied:

- Place your type cursor anywhere between the open and close Field Markers.
- Select **Break Link to Field** from the panel's menu.
- Alternatively click **Break Link to Field** at the bottom of the Typefi Fields panel.

The Field Markers should now no longer be visible, indicating that the text has not been marked up with a Field Marker.

Renaming a Field

To rename a Field:

- Select the Field from the **Typefi Fields** panel.
- Select **Field Options...** from the panel menu and change the Name.
- Click **OK** to acknowledge the name change.
- Alternatively, locate a text frame in your InDesign document that references the Field and place the type cursor anywhere between the Field Markers, then double-click the highlighted fieldname in the **Typefi Fields** panel to access the Field Options... and change the name.

Each of these methods will update the Field name, but not the text that is listed between the Field Markers. To alter the text between the Field Markers you must edit it manually.



Break Link to Field.

Deleting a Typefi Field

When a Typefi Field is deleted from the Typefi Field panel, the Field Markers throughout the template are removed. The text between the original field markers is then 'normal' text and therefore not affected by the removal of the field markers when the Typefi Field definition is removed.

To delete a Field from the Typefi Fields Panel:

- Show the **Typefi Fields** panel (*Window >Typefi* menu).
- Select the Field that is to be removed.
- Choose **Delete Field** from the panel menu.
- Alternatively click the **Delete Selected Field** icon at the bottom of the panel.
- Click **OK** to go ahead and delete the Field.

The Field will no longer be listed in the Typefi Fields panel, and related Field Markers are removed from the document.

Typefi Elements

Typefi Elements can be compared to assets stored in an InDesign Object Library. A Typefi Element – like a library asset – is created once, and then re-used throughout the InDesign layout with different content for each instance that is placed.

Elements work in conjunction with Typefi Frame Types (see [Typefi Frames, p. 81](#)) and (not in every case) Typefi AutoFit (see [Typefi AutoFit, p. 65](#)) and can be formed from a single frame, or a group of frames, and can also include line or shape objects. In addition, Elements can contain Element Content or Image frames as well as Fields.

There are three types of elements: Fixed, Inline and Floating Elements.

Fixed Elements

Fixed Elements are elements for which each instance appears in a predefined context and location. This is in contrast to Inline and Floating Elements which are placed and positioned based on their contextual relationship to content and layout rules during page composition.

The positioning and placement of Fixed Elements is based on their original master page position. The master page on which they are placed must be part of a Typefi Section (see also [Typefi Sections, p. 69](#)). During page composition the content of this element is inserted and the Element position is based on its original position on the Master page. You can use **only one instance of a particular Fixed Element per section**.

Fixed Elements may also be used as a nested Element inside Fixed, Inline or Floating Elements (see [Nested Elements, p. 123](#)). Fixed Elements also differ from Inline and Floating Elements in that they are not based on a prototype element.

Inline Elements

Inline Elements compare best with InDesign's inline or anchored objects. They are inserted into the main story text flow during page composition. The Inline position of these elements can be controlled by an External Paragraph Style (see [External Paragraph Style, p. 111](#)) or anchored object options applied through an Object Style.

Floating Elements

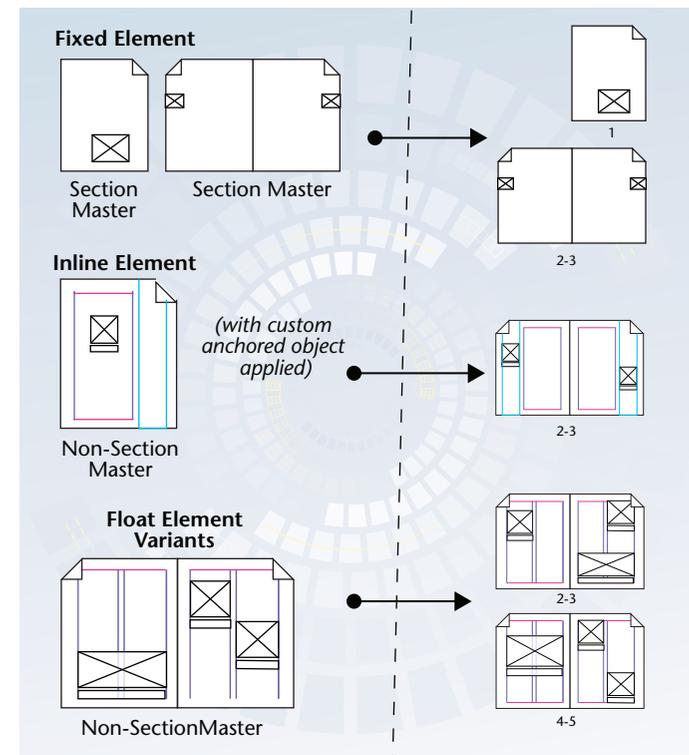
Floating Elements are designed objects that are placed outside the main content thread. The Typefi Engine places and positions them on a page according to layout rules and priorities. Floating Elements may use 'variants', which are layout design alternatives. They can be automatically selected during page-composition based on layout rules that you specify, or the design choice can be made by the author as the Element is inserted in the Word document. (Where Floating Elements overlap Text Frames, enable Text Wrap settings on the Element Group.)

The layout rules are only applied by the Typefi Engine during page composition. They are not considered if the user edits a document manually or if a script is applied. In other words, in contrast to all other features of the Typefi Designer, the Typefi Designer plug-in does not update floating element positions (neither automatically nor on demand).

Element creation process

Elements use various Typefi components such as Typefi Frame Types, Typefi AutoFit, Typefi Fields. Elements can also contain normal InDesign objects such as Text Frames, Graphic Frames or Lines. When creating a Typefi Element you could use the following steps as a 'best practice' approach:

- Step 1 – Create the Element artwork in InDesign
- Step 2 – Set AutoFit relationships and attributes
- Step 3 – Define Typefi Frames and Element Fields
- Step 4 – Apply Frame Types



Elements overview (simplified diagram).

- Step 5 – Define Elements and apply Fields
- Step 6 – Apply the defined Element to artwork
- Step 7 – Define Floating Elements, Variants and Layout Rules

As an example of how you'd run through the element creation process, we'll use the 'Painting Element' that's part of the da Vinci publication. This element is going to be a Floating Element.

Step 1 – Create the artwork

Start by creating the artwork in InDesign, and then determine what type of element you will be creating: Inline, Fixed or Floating. The element you create is a prototype that Typefi uses throughout its page composition process whenever the element is inserted by the author in the content.

Elements that appear more than once in a section, with different content in each element, are always either Inline or Floating. Each appearance of such an element throughout the paginated document is an *occurrence* of the *Element prototype*, or an *occurrence* of the *Element prototype variant*. Such elements cannot be Fixed, as only one occurrence of a Fixed Element can exist within a section.

The artwork for our example element has already been created (see next graphic).

Placement of elements

Although – in contrast to Fixed Elements – Inline and Floating Elements can be placed for use during page-composition on document pages in the InDesign template, it is good practice to keep the number of normal pages in a template document down to a minimum.

Therefore, as 'best practice', create your Inline and Floating Elements on separate master pages that are not used by Typefi Sections and create individual masters for each element type. Typefi Publish will use these elements as objects that it can draw from during the page composition process. To have more control over Floating Elements consider placing them on their own layer. Avoid placing Inline or Floating elements in the Pasteboard area.

Tip: For more accurate placement of Floating Elements, position them on Master Pages that are based on pages used by sections, so that margin and column settings are retained.

There is nothing to prevent you from creating more than one instance of a fixed element of a given name within a section or within another element.

In work-flows that don't use the Writer (like plain XML-based work-flows), any number of fixed elements with the same name can occur in the layout for a single section or a single element instance. The Designer plug-in will just create the anchors to these elements in an order that depends on the order of elements in the containing section or the containing element.

However, it is not recommended to use more than one fixed element of the same name in a section or another element, since it is not obvious for a user in which order the fixed elements will be filled. And if the Typefi Writer is used, it will not allow you to use more than one instance of a fixed element per section or element.

The very 'best practice' would be if the template document is limited to just one normal page with no content and the master page [None] applied to it. This is just a recommendation if performance matters, since the more normal pages a template document contains, the more time it will take the Typefi Designer plug-in to open and clear the normal content pages. During template development, however, it could be helpful to have a lot of example content to experiment with. That is one of the reasons why inline and floating element prototypes on normal pages are allowed (the other one is that it makes it fairly straight forward to mark-up a document with an already desired layout for use as a template document).

Step 2 – Setting AutoFit relationships and attributes

Next analyze the artwork and determine the AutoFit relationships and fitting attributes for the various objects that make up the Element. Use the AutoFit tool and AutoFit panel to set these relationships and fitting attributes.

Let's review the sample element again:

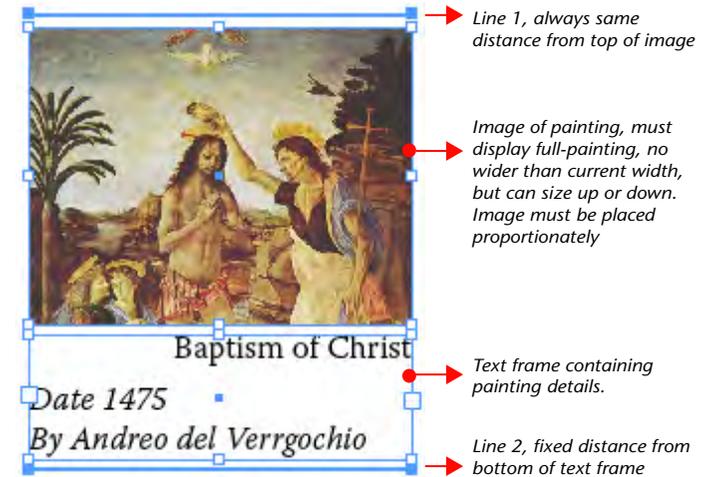
What are the relationship and fitting requirements?

- When the graphic frame is resized as a result of image sizing, the Line 1 must be moved with it, as it must retain a fixed distance to the top of the graphic frame. This is a parent-child relationship between the top of the graphic frame and the line.
- The Text Frame containing the caption must be repositioned as the bottom of the graphic frame is repositioned. This is a parent-child relationship between the bottom of the graphic frame and the top of the Text Frame.
- The Text Frame itself must grow from the top down as more content is entered. This is an AutoFit attribute: Size from Top.
- As the bottom of the Text Frame grows to make text fit, the line below it must move. Hence, there must be an additional parent-child relationship between the bottom of the Text Frame and Line 2.
- We assume that the element has a fixed width, as it is going to appear as a marginal note. You could consider setting a maximum width on the graphic frame, that does not exceed this margin width.

Consider width and height requirements

When working on elements consider the use of frame height restrictions, such as maximum height for the purpose of ensuring that an element cannot grow past the page dimensions.

Minimum size settings could be handy when an author inserts an element, but has not yet received content for that particular element. A minimum size setting would ensure that a certain amount of space is reserved in the layout for the element during page composition.



Sample Element comprising multiple objects



Set AutoFit Relationships and Attributes.

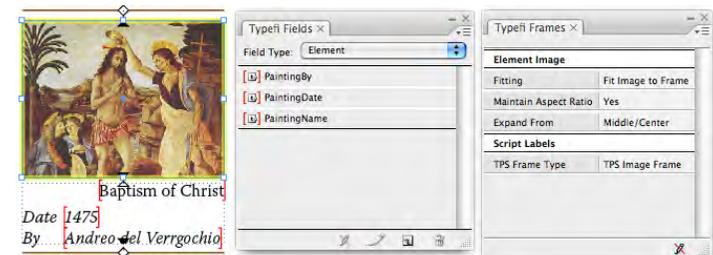
Step 3 – Typefi Frames and Element Fields

With the AutoFit relationships and fitting attributes set, it is time to determine which element items or components are going to be defined by Fields and which will become Typefi Frames.

Consider the following:

- Element Fields are generally used for entry of data by the author that is limited in length and would be inserted in standard InDesign Text Frames.
- Fields inserted inside Element Content frames will always have their entire content overwritten, thereby clearing any literal and Field data that pre-existed in these frames.
- The Element Content frame is normally applied to the Text Frame that is to hold the bulk of the element's text, and can hold multiple paragraphs of text.
- An Element can only contain one unthreaded Element Content frame. Where multiple Element Content frames are required, they must be threaded, then grouped. To use multiple Element Content frames within an Element, use nested Elements (see [Nested Elements, p. 123](#)). Text frame threading must be retained within the element and may not thread to frames in other (nested) elements.
- An Element can contain one or more Element Image frames. However, as the placement order for the images depends on the order in which the images were added to the Element Group, it is difficult for the Typefi Designer to control placement of images in intended order. An alternate solution would be to build a series of fixed elements containing element image frames and nest these inside the Element.

In our example we can use three Fields to set the detailed information for painting name, date and painter, as this data resides in a single Text Frame. If we were to use an Element Content Frame instead, then the author would have to remember in which order to type in these details, as all content must be provided by the author. In addition, the words 'by' in front of the painter's name and 'date' in front of the year in which the painting was first finished must be included. The graphic frame would become an Element Image frame.



Element Example

Step 4 – Apply Field(s) and Frame Types.

Set the Element Content and Image Frame Types. Then for the remainder of the Text Frames apply the Fields. (For more information about defining and applying Fields see [Nested Elements, p. 123](#). For additional information on Frame Types see [Typefi Frames, p. 81](#).)

Step 5 – Define Elements

In order to create an element prototype from the artwork you've created, you must first define the element itself.

To define a new element:

- Select **New Element** from the Typefi Elements panel menu.
- Alternatively, click the New Element icon at the bottom of the Typefi Elements panel.

The **New Typefi Element** dialog box appears.

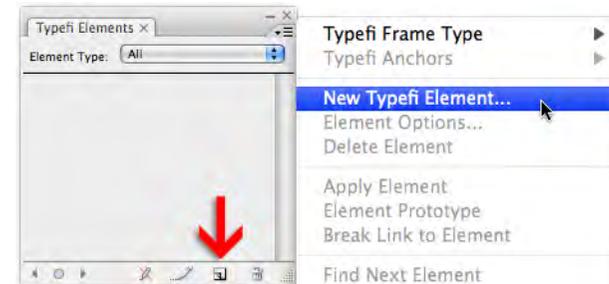
- Set the **Element Type** to either Fixed, Floating or Inline.
- Next enter the rest of the settings as appropriate.
- Click **OK** to save add the Element.

The newly defined Element is now listed in the Typefi Elements panel.

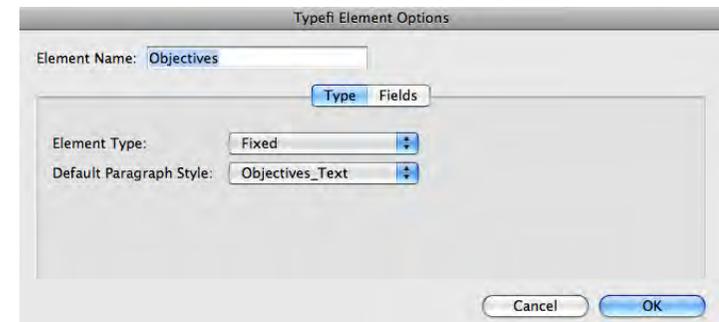
Defining a Fixed Element

To define a Fixed Element:

- Select **New Typefi Element** from the **Typefi Elements** panel menu. Alternatively click the New Element icon at the bottom of the **Typefi Elements** panel.
- Enter a unique **Element Name**.
- Set the **Element Type** to **Fixed**.
- Set the **Default Paragraph Style**.
- Click **Fields** and Assign **Element Fields** that are to be used by the Element (see [Assigning Element Fields to an Element, p. 109](#).)
- Click **OK** to add the New Element to Typefi Elements.



Defining a New Element.



Setting Fixed Element options.

DEFAULT PARAGRAPH STYLE

The **Default Paragraph Style** is the paragraph style assigned to the Element Content area when the Element in question is inserted through Typefi Writer in Word and is therefore only meaningful in Typefi Publish processes that include Typefi Writer usage.

If the Element Content frame options define a **First Paragraph Style** other than [None] (see [First Paragraph Style, p. 92](#)), the first paragraph of the Element Content will be formatted using the First Paragraph Style during pagination, regardless of the Default Paragraph Style that is applied at content level by Typefi Writer.

The Default Paragraph Style formats subsequent paragraphs, and may be overridden with other styles if needed by the author using the Typefi Writer.

Where the First Paragraph Style is set to **[None]** for the Element Content frame, text will be formatted based on paragraph styles applied at element content level by the author in Typefi Writer. Setting the Default Paragraph Style in that case could be an efficient way of formatting the majority of the element content.

For example, if an Element Content frame is to contain lots of normal text paragraphs with the occasional subheading, you'd set the Default Paragraph Style to 'Normal Text' (or whatever the style is named), so that the author would only need to apply the 'subheading' styles for text that is different.

ASSIGNING ELEMENT FIELDS TO AN ELEMENT

Any fields that are part of the Element must be included in the Element. For extensive information on Element Fields and insertion of Fields in Text Frames (see [Element Fields, p. 98](#)).

To assign Element Fields to an Element:

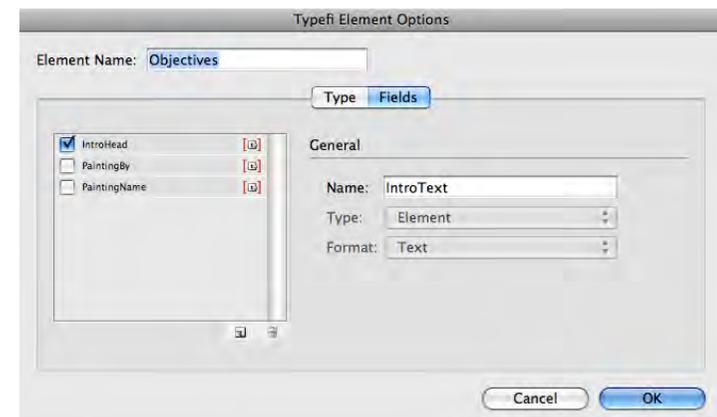
- Click **Fields** in the Typefi Element Options dialog to display the Field section of the dialog.
- Enable those Fields that must be used by the Element.

Alternatively, if the Element Field has not yet been defined:

- Define a new Element Field by clicking the **New Field** icon.
- **Name** the Field .



Element Content Options.



Enabling Element Fields in Typefi Element Options.



For all of the Fields assigned to the Element, the author is prompted to provide input data when inserting this element with Typefi Writer in Word.

Fields may be used to store hidden meta-data that does not appear in the final output, but is required for the content and the XML into which the content is ultimately transformed.

DELETING AN ELEMENT FIELD

The Field area in the Typefi Element Options can also be used to delete Element Fields. However, this only works for Element Fields you've just defined in Typefi Element Options. Fields added to the Elements Fields list whilst the Typefi Element Options dialog is open are listed in Italics when they are not selected, so that they can be distinguished from any Fields defined earlier.

If any other Element Fields need to be deleted please refer to [Deleting a Typefi Field, p. 102](#).

To delete a field:

- Enable the field you've added earlier.
- Click the **Delete** icon at the bottom of the Fields list.

Defining an Inline Element

To define a New Inline Element:

- Select **New Typefi Element** from the **Typefi Elements** panel menu. Alternatively click the New Element icon at the bottom of the **Typefi Elements** panel.
- Enter a unique **Element Name**.
- Set the **Element Type** to **Inline**.
- Set the **Default Paragraph Style**.
- Set the **External Paragraph Style**.
- Click **Fields** and Assign **Element Fields** that are to be used by the Element.
- Click **OK** to add the Element to Typefi Elements.

DEFAULT PARAGRAPH STYLE

The **Default Paragraph Style** is the paragraph style used by Typefi Writer in Word (see [Default Paragraph Style, p. 109](#) for more extensive information).

EXTERNAL PARAGRAPH STYLE

An Inline Element is usually placed within its own paragraph into the main story content during page composition in InDesign. (Like images, inline elements can appear within or outside a paragraph. The external paragraph style is therefore not applied if an inline element is inserted within a paragraph). The **External Paragraph Style** points to a paragraph style that formats this paragraph in which the Inline Element is placed.

Consider creating unique paragraph styles for Inline Element placement in InDesign. The style would contain at least a setting for alignment and leading. **Auto Leading** adjusts the leading according to the height of the Element, thereby preventing it from overlapping text.

ASSIGNING ELEMENT FIELDS TO AN ELEMENT

Any fields that are part of the Element must be included in the Element (see [Assigning Element Fields to an Element, p. 109](#)). For more information on Element Fields and insertion of Fields in Text Frames (see [Element Fields, p. 98](#)).

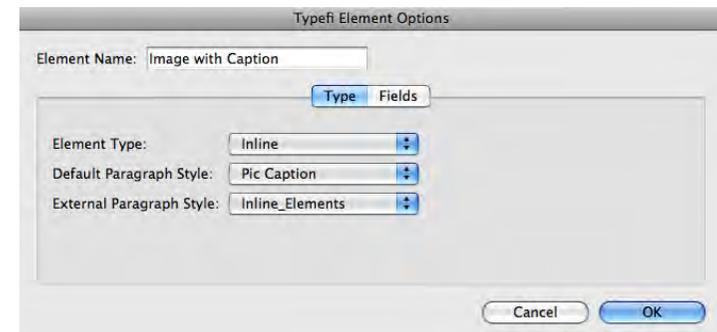
Defining a Floating Element

To define a Floating Element:

- Select **New Typefi Element** from the Typefi Elements panel menu. Alternatively click the New Element icon at the bottom of the Typefi Elements panel.
- Enter a unique **Element Name**.
- Set the **Element Type** to **Floating**.
- Select the **Default Paragraph Style**.
- Enable **Keep floats in order** if required.
- Click **Fields** and Assign **Element Fields** that are to be used by the Element.
- Click **OK** to add the Element to Typefi Elements.

DEFAULT PARAGRAPH STYLE

The **Default Paragraph Style** is the paragraph style used by Typefi Writer in Word (see [Default Paragraph Style, p. 109](#))



Inline Element – Typefi Element Options.

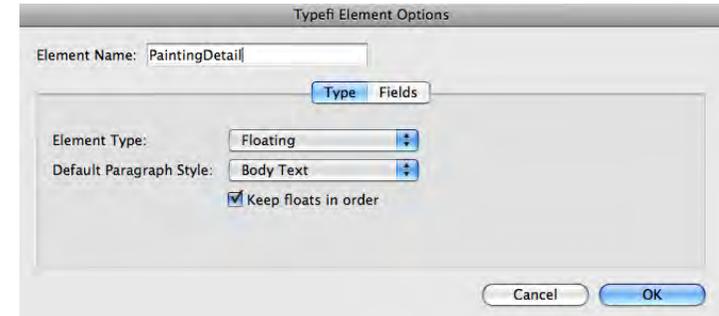
KEEP FLOATS IN ORDER

Keep floats in order ensures that the order of appearance of Floating Elements is retained during page composition. Disabling the option means that the Typefi Engine is at liberty to change the order of the Floating Elements during pagination, if this provides a better placement option.

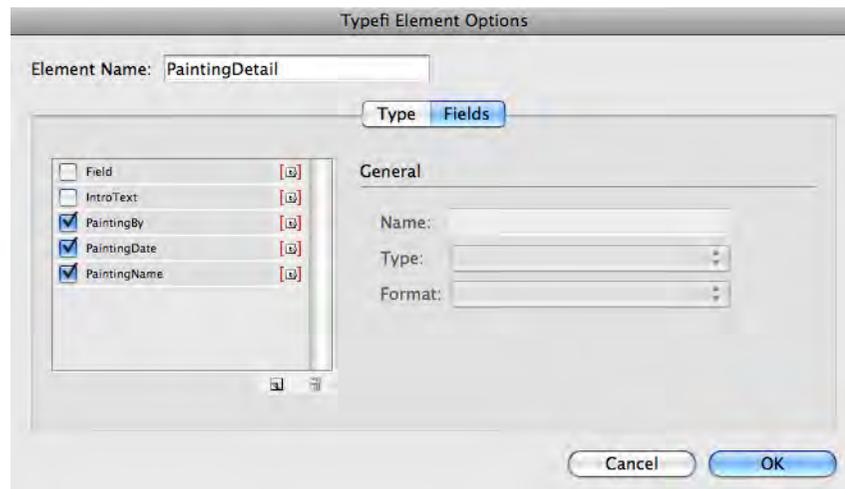
ASSIGNING ELEMENT FIELDS TO AN ELEMENT

Any fields that are part of the Element must be defined as part of the Typefi Element (See [Assigning Element Fields to an Element, p. 109](#)).

In the example above, we're defining the Floating Element for PaintingDetails. The three Element Fields added earlier must all be listed in the Used Fields list, so that the author will be prompted to enter the specific information requested by each of the Fields. E.g. Name of the Painting (PaintingName), Date of the painting (PaintingDate) and the Name of the painter (PaintingBy).



Defining a Floating Element.



Assigning Element Fields to the Typefi Element.

Element listing

All Elements are listed in the Elements panel. Each element type is preceded by an element specific icon. To display all Element Types in the Elements panel, select **All** from the **Element Type** pop-up menu.

For projects containing a large amount of elements, you might want to view only elements of one particular type. From the Element Type pop-up menu select the Element Types (Inline, Fixed, Floating) you'd to like display in the Elements panel.

Step 6 – Apply the element.

At this stage we've prepared all of the artwork and defined a new Typefi Element. We have not yet defined the artwork itself as an Element Prototype. Applying the Element to selected artwork defines the Element Prototype.

To apply a defined element to your artwork, whether it is a Fixed, Inline or Floating Element:

- Select all of the frames and lines that make up the element with the Selection tool.

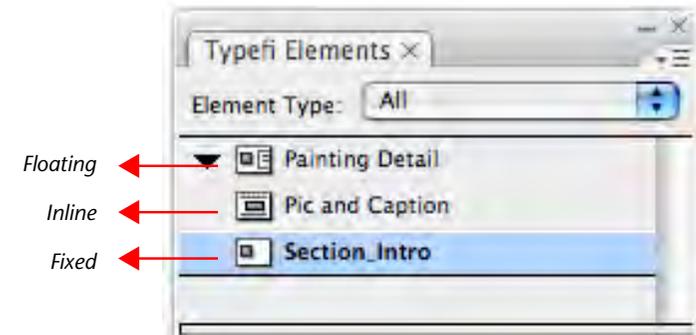
AUTOMATICALLY GROUP SELECTIONS

Artwork that is going to have an Element applied to it must be grouped. However, you won't need to manually group the objects before applying the Element. Simply enabling the **Automatically Group Selections** option in the Typefi Elements panel menu will do.

- From the **Typefi Elements** panel menu verify that the **Automatically Group Selections** option is enabled.
- Select the Element Name from the Typefi Elements panel. If you can't see the Element name, ensure that the Element Type menu lists **All** elements.
- Select **Apply Element** from the panel menu. Alternatively click **Apply Selected Element** at the bottom of the panel.
- A default Light Blue colored border appears around the group for Floating or Inline Elements, with a name tag in the lower left hand corner. Fixed Elements display a default Green border.

ELEMENT PROTOTYPE

Element designs for Inline and Floating Elements must be Element Prototypes of an Element in order for them to be useable by Typefi Publish during page-composition.



Different Element Types.

The default Element Prototype Typefi Border color is Light Blue. Disabling the **Element Prototype** option from the Typefi Elements menu turns the Element into an instance of an Element. The default Element Instance Typefi Border color is Green.

Element Prototype and Instance Typefi Border colors could appear differently for documents with alternate Typefi Border Preference settings (see [Typefi Borders](#), p. 150).

Apply Fixed Element

An example of a Fixed Element would be a graphic that appears on the Chapter Title page:

To apply a Fixed Element:

- Select all objects that form part of the Element design.
- Select the Element in the Typefi Elements panel
- Choose **Apply Element** from the panel menu.
- Alternatively click **Apply Selected Element** at the bottom of the panel.

The Green Border indicates you've created a Fixed Element Instance.

Apply Inline Element

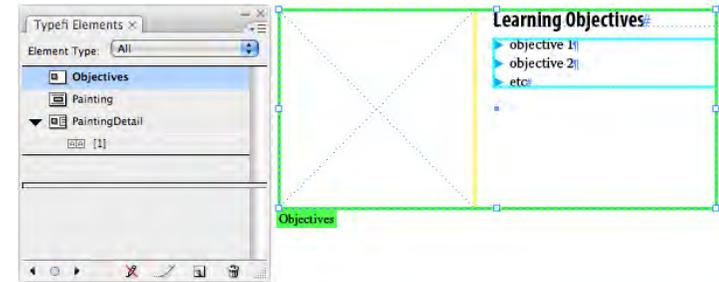
To apply an Inline Element:

- Select all objects that form part of the Element design.
- Select the Element in the Typefi Elements panel.
- Choose **Apply Element** from the panel menu.
- Alternatively click **Apply Selected Element** at the bottom of the panel.

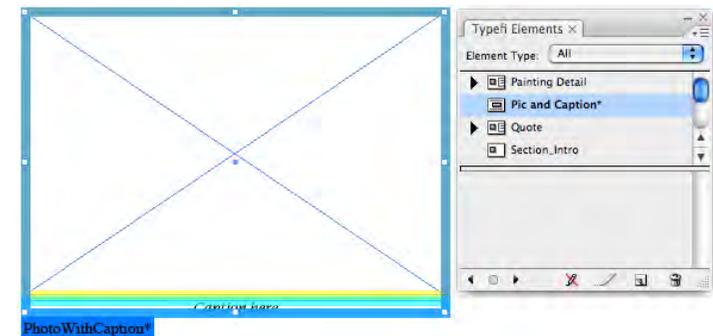
A blue group border indicates the Inline Elements is applied to the artwork and the artwork is marked up as the Element Prototype.

After applying the element to the artwork, consider applying an Object Style to the element that sets specific anchored object settings that position the Inline Element during page composition.

Note: As Typefi places content dynamically, please ensure that the 'Prevent Manual Positioning' option in the Anched Object Options is disabled when applying an Object Style to Inline Elements.



Applying a Fixed Element to a selected group of objects.



Inline Element applied.

Apply Floating Element

To apply a Floating Element:

- Select all objects that form part of the Element design.
- Select the Element in the Typefi Elements panel.
- Choose **Apply Element** from the panel menu.
- Alternatively, click **Apply Selected Element** at the bottom of the panel.

The default blue group border indicates the Floating Elements is applied to the artwork. As a Floating Element must have at least one variant, a single variant is listed immediately below the Element, with a [1] marker next to it, indicating that this is Floating Element variant 1.

The default Light Blue group border further indicates that the selected variant is marked up as the Element Prototype. Disabling the **Marked as Element Prototype** option from the **Typefi Elements** panel menu turns the Element into an instance of the selected variant. The default group border color changes to Green.

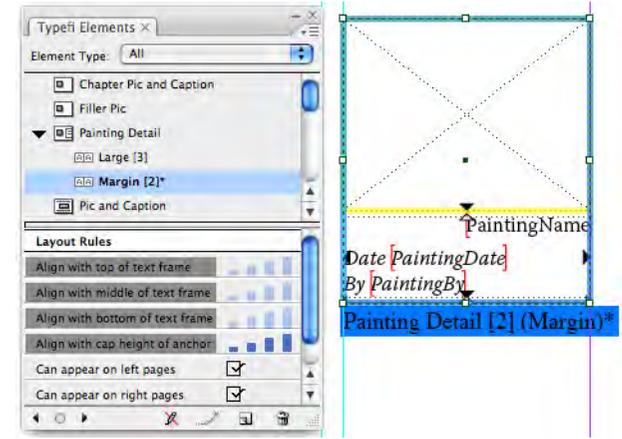
As Floating Elements are often placed over the Main Story content, applying Text Wrap to them will ensure that the content of the Main Story flows around the elements. (To apply consistent and easily changeable Text Wrap settings to Floating Elements you could create and apply an Object Style to the element that only sets the Text Wrap settings to the element.)

Step 7 – Define Floating Element Variants and Layout Rules

Floating Elements differ from Inline Elements as their prototypes are always variants. Each variant has its own set of layout rules controlling variant selection and placement during page composition. An Inline Element, in contrast, has only one prototype that must exist for pagination.

Floating Element Variants

Variants represent a design for a Floating Element. Every Floating Element must have at least one variant, but may also have more than one variant. Variants can be used to create asymmetrical versions of the same element. One element design may be targeted at a left-hand page, and another at the right. Variants can also be used to define different horizontal span sizes for elements. For example, a variant may span both columns in a two-column design, while another variant of the same element fits neatly into a single column.



Floating Element applied.

Positioning of variants is controlled through layout rules. The layout engine will choose and place the variants based on these rules. Authors could limit that choice further, by specifying that a particular variant should be used as they are inserting the element in content. This also permits variants to be defined and used for special purposes such as for reserving the right amount of space on the page for an illustration that is still to come. One variant could reserve a full page, while another could reserve half a page.

Let's take a closer look at Variants and Layout Rules for Floating Elements.

Creating Variants for Floating Elements

A variant is automatically created when you first apply a Floating Element to selected artwork (see [Apply Floating Element, p. 115](#)).

To create additional variant prototypes for a Floating Element:

- Select alternate element design artwork.
- Click the Floating Element name in the Typefi Elements panel.
- Choose **Apply Element** from the Typefi Elements panel menu or alternatively click **Apply Selected Element** at the bottom of the Typefi Elements panel.

Variants are automatically numbered [1], [2], etc., and during page composition each variant prototype is considered for placement.

VARIANT OPTIONS

Variant Options set variant specific settings such as: variant name, layer in which the variant is placed during pagination. As well as minimum space allowed between variants.

To edit the **Typefi Element Variant** options:

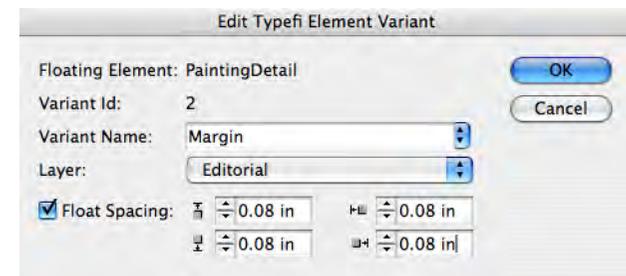
- Select **Element Options** from the Typefi Elements panel's menu.
- Alternatively, double-click the variant in the Typefi Elements panel.

The **Typefi Element Variant Options** dialog is displayed:

- Enter the **Variant Name** (if needed).

A variant name will be visible to the author in Typefi Writer and enable the author to choose which particular variant is to be used during page composition. Leaving the Variant Name empty will not provide the author with the choice of variant. The choice of variant is then made during page composition by the Typefi Engine.

A variant must have a name in order for the author to be able to select it in the Writer.



A Variant (named 'Margin') of a Floating Element (named 'PaintingDetail')

Different variants of an element can carry the same name. For instance, if there are right and left page versions for the Margin_Float, similar to the margin notes in this user guide. Creating two variants one for the left and one for the right hand page designs carrying the same name, will prompt the Typefi Engine to use the appropriate design when the element is inserted on either left or right hand page.

Variants that contain significant difference in appearance or layout rules could be given different variant names so that the author can distinguish them when inserting an Element and choosing its variant.

- Select the **Layer** in which the variant should appear.

By default the layer in which the current variant is placed is selected.

- Set **Float Spacing**.

To prevent multiple Floating Elements placed on individual pages from overlapping, enable **Float Spacing** for the element variant and set the minimum space settings. These space settings are acknowledged during page composition.

- Click **OK** to apply the Variant Options to the selected Variant.

Setting Layout Rules

Each variant has its own set of Layout Rules. These layout rules are considered by the layout engine during page composition and play an important role in determining where on a page a Floating Element will be placed.

To display a variant's Layout Rules:

- Select the variant in the Typefi Elements panel.
- The **Layout Rules** display in the lower half of the panel.

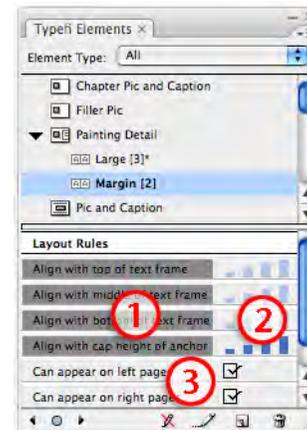
Layout Rules for variants consist of three different rule components:

- 1) **Align with...** rule options that set rules for vertical and horizontal placement of the element.
- 2) **Priority bars**, that the layout engine uses to prioritize the four Align with... rule settings when placing elements.
- 3) **Can appear on...** settings that define whether an element can be placed on Left, Right or both pages during page composition.

Notes:

The element prototype and all element instances will be placed on that layer.

If you move the prototype of a floating element to a different layer in InDesign, this setting will be modified as well, moving also all element instances to that layer.



Layout Rules for selected variant, with cursor setting priority rules for variant alignment.

ALIGN WITH... RULE OPTIONS

Align with ... rule options determine the vertical and horizontal positioning of variants during page composition.

To define the **Rule Options**:

- Click the dark gray **Align With...** bars in the Layout Rules section of the Typefi Elements panel.

There are **four Align with... rule options** that can be set for a variant, namely:

- Align with top of ...
- Align with middle of ...
- Align with bottom of ...
- Align with ... of anchor

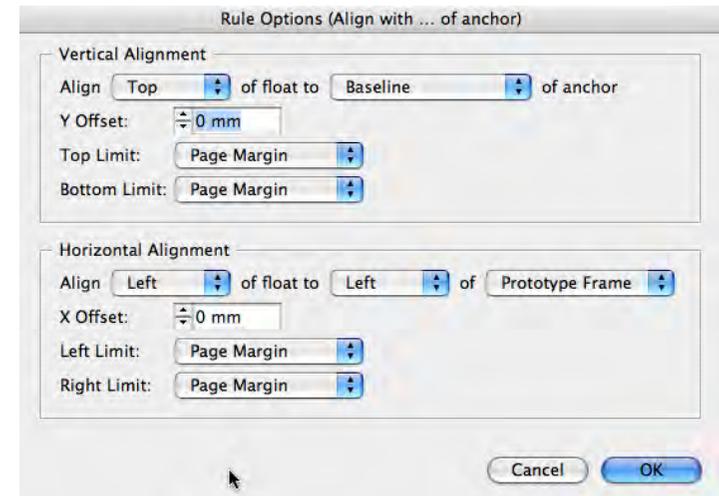
The first three rule options: Align with top, Align with middle and Align with bottom point to vertical positioning in association to the Text Frame position (Main Story Frame) by default. The fourth rule is set to Align with Baseline of anchor by default.

VERTICAL ALIGNMENT

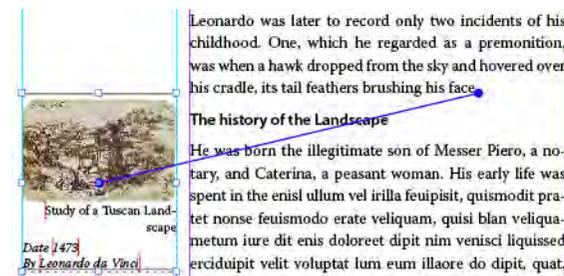
Vertical Alignment settings determine the vertical positioning (top/bottom) of the Floating Element variant on the page.

The **Align with Top, Middle** and **Bottom** of ... rule options define:

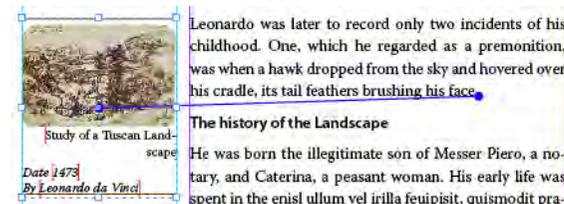
- Which part of the Floating Element Variant (Top, Middle or Bottom) is going to align to the **Top** of either **Column Edge, Text Frame (default), Page Margin, Page Edge** or **Prototype Frame**.
- Which part of the Floating Element Variant (Top, Middle or Bottom) is going to align to the **Middle** of either **Column Edge, Text Frame (default), Page Margin, Page Edge** or **Prototype Frame**.
- Which part of the Floating Element Variant (Top, Middle or Bottom) is going to align to the **Bottom** of either **Column Edge, Text Frame (default), Page Margin, Page Edge** or **Prototype Frame**.



Rule Options (Align With ...).



Vertical Alignment example: Top of float aligned with Baseline of anchor.



Vertical Alignment example: Top of float aligned with Top of Paragraph of anchor.

As an element is inserted in content using Typefi Writer a link is defined between the element and the text position where it was referenced in the text. After page composition, these links can be made visible in InDesign. The markers that display the link are called Typefi Anchors.

To display Typefi Anchors in InDesign:

- Select **Show Typefi Anchors** from the **View Menu**.

The **Align with...** of anchor option defines which part of the Floating Element Variant (Top, Middle or Bottom) is going to align to either the **Baseline**, **Cap Height**, **Top of Leading**, or **Top of Paragraph** of the anchor position. The anchor position relates to the point at which an author inserts an element into the Word document.

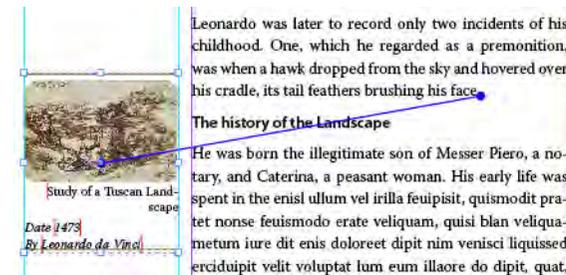
The following table summarizes the anchor based vertical alignment options.

Option	Description
Baseline	Positions the top, middle or bottom of float to the baseline of the Anchor location for the element.
Cap Height	Positions the top, middle or bottom of float to the Capital Height of the line of text in which the anchor is placed.
Top of Leading	Positions the top, middle or bottom of float to the Top of the Leading of the line of text in which the anchor is placed. This means that the top, middle or bottom of the float is seemingly aligned with the bottom of the previous line.
Top of Paragraph	Positions the top, middle or bottom of float to the top of the paragraph in which the anchor is placed. If the anchor is placed at the end of the paragraph, the alignment will relate to the top of the first line of that paragraph.

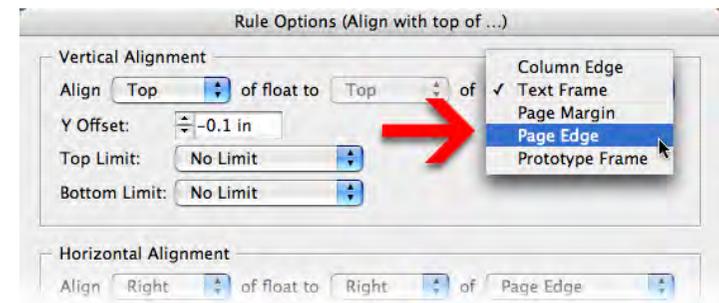
When an Align with... option is edited, the Layout Rules text display for the option in the Typefi Elements panel is updated.

For instance, let's look at the default **Align with top of Text Frame** rule option. If we change this to **Align Top of float to Top of Page Edge**, the rule text will change to **top of page edge**.

The **Y-offset** value defines a further vertical movement for the element after placement according to the **Align with...** rule options. A negative value will move the element up; a positive value will move the element down. The value (-0.1



Vertical Alignment: Top of float to Top of Leading of anchor.



Rule Options for Align with Top of ... settings.

in) assigned for the Y-offset in the previous Rule Options screenshot, moves the element outside the page area into the document bleed.

The **Top** and **Bottom Limit** options further constrain the positioning of the variant vertically. Keep in mind that these options carry the highest level of priority and overrule other Vertical Alignment settings. For instance, setting the Top Limit to Page Edge and entering a negative Y-offset value (-0.1 in) in the example above will push the Element -0.1 in into the bleed area of the document. The Top Page Edge value (equal 0 in), would override the negative Y-offset value.

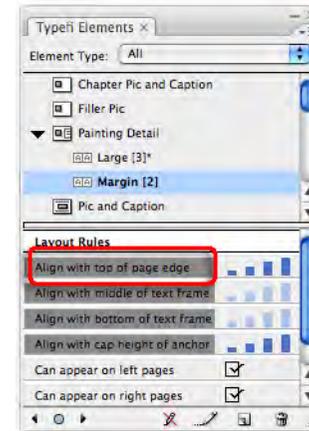
Vertical Alignment Limit Options	Description
No Limit	Variant placement can fall inside as well as outside the page boundaries. Where No Limit is selected, the Y-offset and Align with... options will take precedence.
Column Edge	Variant placement must fall within the top and bottom edge of the text column position frame on the page. This will be the text column that contains the Typefi Anchor to the variant.
Text Frame	Variant placement must fall within the top and bottom edge of the Text Frame on the page. This will be the main story frame.
Page Margin	Variant placement must fall within the top and bottom margins defined for the page on which it is placed.
Page Edge	Variant placement must fall within the top and bottom edge of the page.
Prototype Frame	Variant placement must fall within the top and bottom position of the actual prototype frame. Setting these limits to prototype frame ensures vertical positioning is set to the current prototype variant position.

HORIZONTAL ALIGNMENT

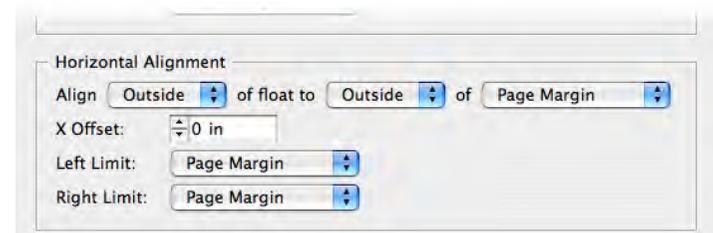
Horizontal Alignment options define the horizontal positioning (left/right) of the variant on the page.

The **Align with...** rule options define:

- Which part of the Floating Element Variant (**Left, Center, Right, Outside, Inside**) is going to align to the **Left, Center, Right, Inside, Outside** of either **Column Edge, Text Frame, Page Margin, Page Edge** or **Prototype Frame (default)**.
- Which part of the Floating Element Variant (**Left, Center, Right, Outside, Inside**) is going to align to the **Anchor**



Edited Align with... rule.



Horizontal Alignment Options.

Inside/Outside settings refer only to the documents with facing pages (left/right-spreads).

- **Inside** refers to the spine-side.
- **Outside** refers to the trim-side.

The use of Inside/Outside alignment options allows a single variant to be applied to Left and Right pages.

The **X-offset** value defines a further horizontal movement for the element after placement according to the Align with rule... options. A negative value moves the element to the left; a positive value moves the element to the right.

The **Left and Right Limit**, determine the outermost positions at which the variant may be placed in the page composition.

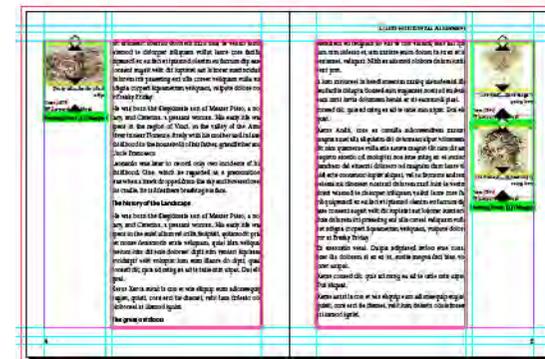
Horizontal Left / Right Limit Setting	Description
No Limit	Variant placement can fall inside as well as outside the page boundaries. Where No Limit is selected, the X-offset and Align with... options will take precedence.
Column Edge	Variant placement must fall within the left/right edge of the text column position frame on the page. This will be the text column that contains the Typefi Anchor for the variant.
Text Frame	Variant placement must fall within the left/right edge of the Text Frame on the page. This will be the main story frame.
Page Margin	Variant placement must fall within the left/right margins defined for the page on which it is placed.
Page Edge	Variant placement must fall within the left/right edge of the page.
Prototype Frame	Variant placement must fall within the left/right position of the actual prototype frame. Setting these limits to prototype frame ensures horizontal positioning is set to the current prototype variant position.

PRIORITY BARS

Each **Align with...** rule has its own priority bar. The **Priority Bars** set the importance level of the rule. Priorities can range from none (0), to some (1, 2, 3), to full (4).

To edit the priority level for an **Align with...** rule:

- Click on the bars with the mouse.



Element variant placement in double-sided layouts



Priority Bars indicating rule preferences

Clicking to the left of the smallest bar sets the *priority level to none*.

During page composition, the Typefi Engine considers all rules and priority levels set for the variants. It then determines the best possible layout through placement of elements according to the highest combined priority levels. When one *Align with...* rule has a priority setting and others don't, the Typefi Engine will use the priority setting and matching Align with... rules for placement of the element variant.

For example, to align an element to the top of the page and never any other position, set the align top of frame rule to the highest priority and set the priority level to none for all other Align with... rules.

Overall, variants with a higher overall priority setting will take precedence on the page during page composition.

CAN APPEAR ON OPTIONS

The *Can Appear On* left or right page options define whether a variant may be placed on a left page, right page or both left and right pages. Select *Can Appear On ...* text, to allow placement. Deselect *Can Appear On ...* text, to disallow placement.

More on Fixed Elements

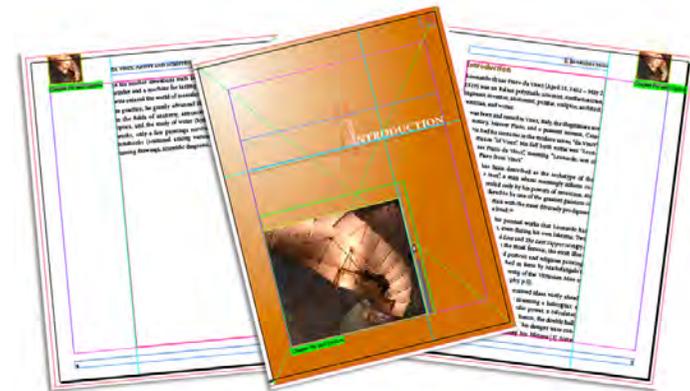
The same Fixed Element can be applied to artwork on different Master Pages used as part of a Typefi Section definition. However, content for an individual fixed element is only assigned once per section. This means that where an Element is repeated on other master pages, the same content is inserted for each occurrence of the Element.

Warning: Although this feature works on Element Image frames, Typefi does not provide support for use of this feature in Element Content frames, as conflicts with cross-references, bookmarks and Table of Contents generation could occur where the same element is repeated across a section.

It is generally recommended that Fixed Elements are used on the Master Page that starts a section, rather than on the repeating pages.

Can appear on left pages	<input type="checkbox"/>
Can appear on right pages	<input checked="" type="checkbox"/>

Choosing whether an Element can appear on left or right-hand pages (or both)



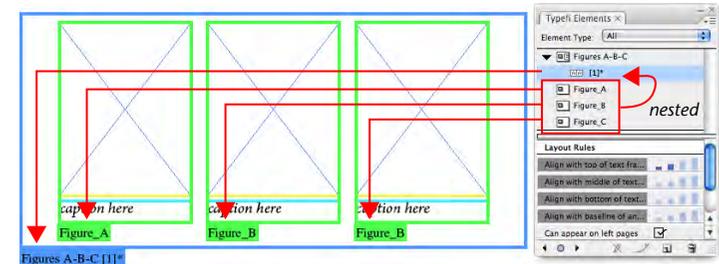
Fixed Element placed on different pages.

Be consistent in usage of Typefi frame types for Fixed Elements, especially where they are applied to different artwork on various Master Pages that are part of sections. In addition, you should refrain from using Fixed Elements of the same name more than once, as different pagination results could be generated in different versions of Typefi Publish.

Nested Elements

Fixed Elements may be nested inside Fixed, Floating or Inline Elements. An example would be a Floating or Inline Element that consists of three graphic+caption components.

Each of these sub-components could be defined as an individual Fixed Element and included in the Floating or Inline Element. The Floating or Inline Element must contain an Element Content frame (set to be non-printing and made very small) in order to populate this with the Fixed Elements it contains. Using this technique makes it easier to provide prompts for authors in regards to insertion of multiple images or fields in an element.



Three Fixed Elements nested within a Floating Element.

Typefi Anchors

Anchors are markers that indicate where an element is referenced in the content. The location of the element in relation to its anchor is determined by the element's layout rules.

Displaying Anchors

In a paginated InDesign document that contains placed elements, the relationship between an element and its reference point in the text can be displayed by selecting **View > Show Typefi Anchors**.

When displaying a story that contains **Typefi Anchors** in the **Story Editor (Edit menu)**, anchors are displayed using the same icon InDesign uses to display Anchored Objects.

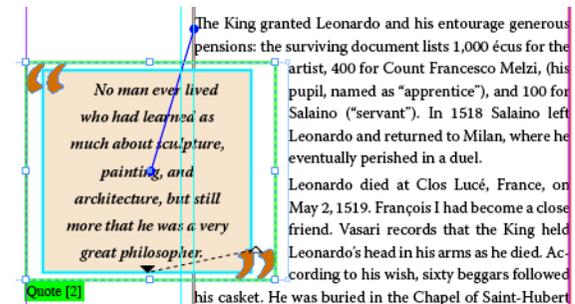
For Fixed and Floating Elements, the Story Editor will display a single Anchor icon. For Inline Elements, the Story Editor displays two Anchor icons. The first of these is the Typefi Anchor and the second is the InDesign anchor. Deleting the first anchor will leave the Element artwork in place, but it loses its reference to Typefi. Deleting the second anchor will result in total deletion of the Element and both anchors will be deleted.

Repositioning Anchors

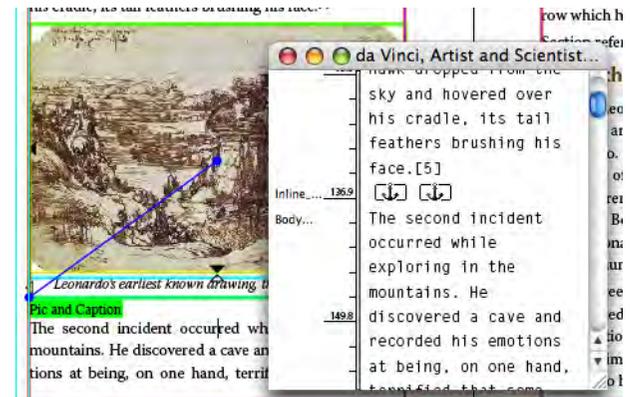
To edit the Anchor position:

Drag and Drop Text Editing for the Story Editor must be enabled in **Preferences > Type** in order to drag and drop anchors into new positions.

- Start by displaying the Typefi Anchors.



Floating Element with Anchor relationship displayed.



Inline Element with double Anchor displayed in the Story Editor.

- Place your text cursor close to the anchor position in the text.
- From the **Edit** menu select **Edit in Story Editor**.
- The Story Editor window appears. Locate the anchor or anchors and highlight them.

To reposition the Anchor:

- Place the cursor roughly in the highlighted area and when the drag and drop text icon appears, click and drag the highlighted anchor(s) to their new position.
- Close the Story Editor window when finished.

Creating Typefi Anchors

When a new Element instance is added to an InDesign document post-pagination, a Typefi Anchor is not automatically inserted.

It is important to create Anchors, as without these Element references, elements will stay behind during the round tripping process from InDesign back to CXML and therefore won't appear in any new content files that are created or updated based on the CXML file.

Note: Anchors created for Inline Elements are always inserted next to the InDesign anchored object anchor.

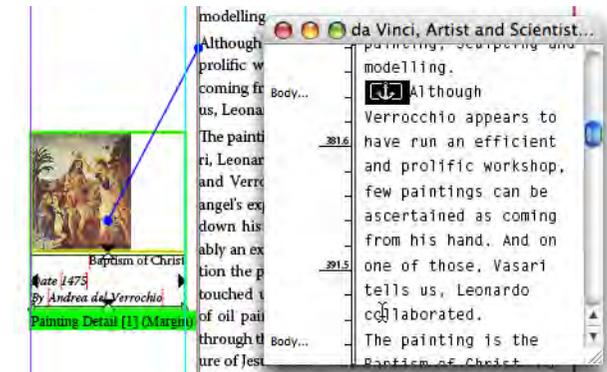
To create Typefi Anchors after placement of new Elements:

- Select the **Create At Start of Page** or **Create At End of Page** from the **Object > Typefi Anchors** menu.

Anchors will be created for all Elements that lack a reference.

Create At Start of Page

Create At Start of Page inserts the Anchors at the start of the first paragraph on the page that contains the Element. If this paragraph starts on the previous page, the anchor is actually inserted at the end of the previous page.



Anchor position changed.

Create At End of Page

Create At End of Page inserts the Anchors at the start of the last paragraph on the page that contains the Element. If this paragraph continues on the next page the anchor is actually inserted at the start of the next page.

To move an anchor to a different location after creation, use the steps outlined in [Repositioning Anchors, p. 124](#).

Remove all Anchors

When performing a lot of post-processing editing tasks in InDesign, such as moving elements to different pages or locations, it might be useful to remove all anchors prior to (re)creating them.

To remove all anchors:

- Select *Remove all Anchors* from the *Object > Typefi Anchors* menu.

Table Styles

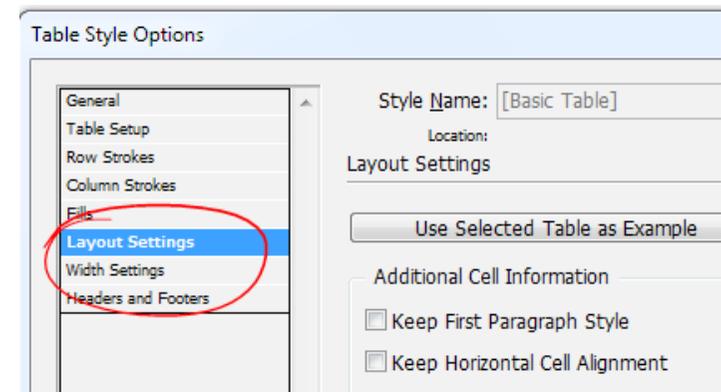
A Table Style is a style that prescribes how a table is to be formatted. When you define a table style and apply it to many tables, the tables will take on the same formatting as that defined by the style. As you edit the table style, any tables formatted with the style will automatically be updated throughout the document.

Table Styles include specific properties, such as table formatting and column width behavior that is used during pagination. It isn't often that tables inserted in Word by the author have the same number of columns or rows as the table used as the source of the Table Style created in the InDesign template.

Typefi Table Styles features are added to the InDesign Table Styles Panel. . Three additional settings categories are added: Layout Settings, Width Settings and Headers and Footers.

All of the Table Style settings as well as the settings enabled for a table by the author in Word (such as header and footer rows) assist the layout engine in working out which formatting it should apply to the various rows and columns of the table.

Table Styles must be added to the InDesign template so that the author can use them in Word. These tables, once marked-up appropriately with Typefi Writer, will then reformat themselves during page composition in accordance with the Typefi Table Style settings.



Three extra categories are added to the InDesign Table Styles dialog.

Creating Table Styles

So where do we start when it comes to creating Table Styles with Typefi Table Style functionality?

Table Styles can be created from a base table style design that was created using InDesign's built-in Table Styles, Cell Styles, and Table feature, and then further formatted to the design requirements.

Although not necessary, it would not be a bad practice to create potential prototype tables on a separate master page that isn't used by Typefi Sections. In contrast to how Elements work, Table Styles are fully self-contained and don't require the original table to be kept, similar to how paragraph, character and object styles work. For example, once you've created a new Table Style, which could be based on a table style you'd started with, the original table style is no longer required for formatting purposes.

Designing tables for Table Styles

Let's assume a table design was created by the project designer:

Most project designers will make a table design look the way it needs to look once the layout is finished. When designing tables for the automated Typefi Publish workflow there is one important thing to keep in mind: The prototype table from on which you base the Table Style is not allowed to contain any merged cells. A Table Style, when applied, does not generate any merged cells and is used solely to determine which formatting is applied where. As any number of cells can be merged by the author in Word or editor of an InDesign document, unmerged data is required as a reference to this formatting.

This means that when you're looking at the previous table design, you'd need to recreate the table and count how many rows and columns the table would have in its unmerged version, and use this unmerged table as the source design for a new Table Style.

In short: to start the development of a Typefi Table Style, generate a table design that contains NO merged cells. The author inserting a table with Typefi Writer in Word **can** merge cells, as can the project designer who inserts a new table in InDesign.

HEADING OF TABLE HERE		
	artworks	exhibitions
childhood	Arno Valley	June 2007
1452-1466	Verocchi David	August 2008
1466-1476	Baptism of Christ	July 2009
1476-1519	Study of horse	January 2010

Table design in InDesign containing Merged Cells.

HEADING	artworks	exhibitions
childhood	Arno Valley	June 2007
1452-1466	Verocchi David	August 2008
1466-1476	Baptism of Christ	July 2009
1476-1519	Study of horse	January 2010

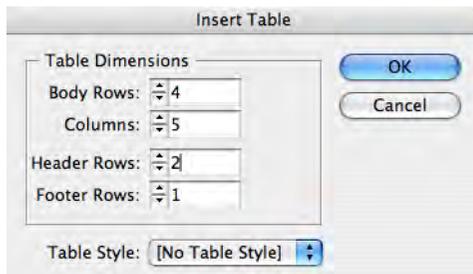
Unmerged version of the table design, which can be used for development of Typefi Table Styles.

A note of caution: try to use just the minimum of rows and columns to define all necessary repeating patterns. Large table prototypes can create problems as soon as the InDesign document would get converted to a new version of InDesign or a new version of a plug-in that requires a different plug-in specific data format.

To ensure the best level of automation when creating a table design or table style that forms the basis for the Typefi enabled Table Style use the following approach:

Insert Table

To insert a new table, ensure you have created a Text Frame first and inserted the Type Cursor at the table insertion point. To insert a new table select **Table > Insert Table**. The Table Dimensions dialog appears, prompting you to enter header, footer, body rows and columns settings. To create a new table that is not based on an existing Table Style, ensure the Table Style option is set to [No Table Style].



Insert table.

Enter at least the minimum rows and columns settings required to create a table that can contain all table attributes. For instance, if your table design will have two Header Columns and one Footer Column, then a minimum of 3 Columns must be included.

Column and Row Types

Header Rows are rows located at the top of the table and can repeat themselves when a table is broke across columns, frames or pages during pagination. **Header Columns** are columns located at the left side of the table. **Footer Columns** are columns located at the right side of the table. **Footer Rows** are rows located at the bottom of the table and can repeat themselves when a table breaks across columns, frames or pages during pagination.

HEAD1	HEAD1	HEAD1	HEAD1	HEAD1
head2	head2	head2	head2	head2
header col	head col2	body	body	footer col
header col	head col2	body	body	footer col
header col	head col2	body	body	footer col
header col	head col2	body	body	footer col
footer	footer	footer	footer	footer

Example of table containing two Header Rows, two Header Columns and one Footer Row.

Table header and footer rows are introduced and managed by InDesign, while header and footer columns are introduced and managed by the Typefi Designer plug-ins.

Format table

You're now ready to continue formatting the table. Start by using InDesign's **Table Options** and **Cell Options** to define **Table Setup**, **Alternating Row/Column Stroke** or **Fill Settings**, **Text Inset**, **Row Height** etc. and format the header rows/columns, footer rows/columns and body cells with paragraph styles. In addition, use InDesign's Cell Styles to format rows and columns.

When formatting the InDesign table keep in mind the following formatting differences between InDesign's native Table Style definition and Typefi's extended Table Style definitions. InDesign's Table Styles are limited, applying just one cell style for the formatting of Header Rows or Footer Rows. In addition, InDesign can only define a different layout for one Left and one Right column. Typefi's Table Style extension allows for different header and footer row designs and multiple header and footer column designs.

New Table Style

Once you've created and formatted the Table in InDesign you are ready to create a new Table Style.

To create a New Table Style:

- Select the entire table.
- From the Table Styles panel menu select **New Table Style** or alternatively click the New Table Style icon.

The **New Table Style** dialog box appears.

- Enter a unique **Table Style Name** for the style you are creating.

This table style name will be available to the author as a table is inserted in content using Typefi Writer.

- Next make the appropriate table attribute changes where required for each of the categories listed in the dialog: **General**, **Table Setup**, **Row Strokes**, **Column Strokes**, **Fills**, **Layout Settings**, **Width Settings**, **Headers and Footers**.
- Click **Ok** to add the Table Style to the Table Styles panel.

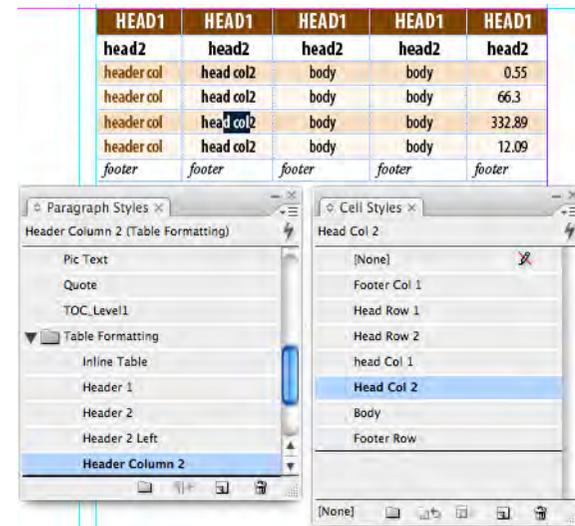
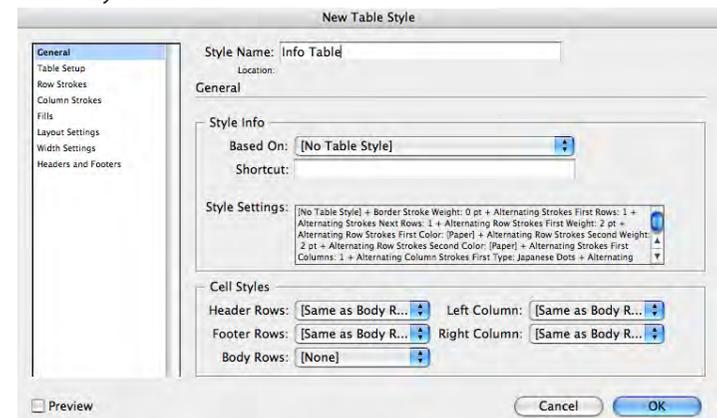


Table fully formatted.



New Table Style dialog.

Table Setup, Row/Column Strokes, Fills and Header and Footer settings are identical to InDesign's settings. Creating a new table style from a table style that is already formatted in InDesign automatically copies across the Table Setup, Row/Column Strokes, Fills and Header and Footer settings.

Create Table From Style

The InDesign menu 'Table' contains two additional Typefi Publish specific items:

'Create Table from Style...': This is an alternative to InDesign's 'Insert Table...'. The item opens a dialog to allow you to select a table style that is used to apply the Typefi table prototype information to a newly-inserted table. The dialog also allows you to choose whether the prototype table or a new table instance should be created.

'Typefi Table' is a sub menu with:

'Apply Typefi Style Attributes': Just (re-)applies the Typefi specific table style attributes.

'Avoid Table Cell Oversets': Active if the selected table has cells with overset text. The Typefi plug-ins try to modify the cells of the selected table such that no overset occurs (which might ignore the maximum table width setting of the style to some extent).

'Mark as Prototype Table': Applies the current prototype table settings. Needed to specify empty cells definitions. You will need to update the table style setting by opening the table style dialog and apply 'Use Selected Table as Example' in the 'Layout Settings' panel.

Layout Style Settings

To copy all table attributes from the selected table into the New Table Style:

- Click ***Use Selected Table as Example***.

Where the new table design isn't based on a table containing Typefi specific table attributes, some settings will require additional setup, as these aren't defined in the current table attributes. For instance, the Header Columns and Footer Columns settings default to "0".

Reset Typefi Attribute

To clear all Typefi specific table attributes from the Table Style and retain only InDesign table attributes, click **Reset Typefi Attributes**.

Additional Cell Information

Text inside cells for the table design from which you are creating the Typefi Table Style might be formatted using a Paragraph Style or Cell Style that applies a Paragraph Style.

Keep First Paragraph Style

The **Keep First Paragraph Style** records the paragraph style applied to the first paragraph of each table cell as an attribute of the Table Style definition.

Enabling this option means that regardless of the paragraph style formatting applied by the author to first paragraphs in table cells, the style recorded as the table attribute is applied.

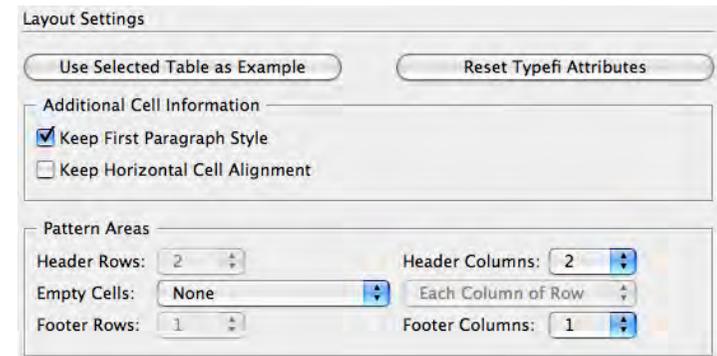
This feature is particularly handy for tables that contain fixed formatting of cell data, where the cell formatting is predictable, such as those we see in reports. However, where the table data must be formatted with a range of different paragraph styles, this option should be disabled. It consequently means that no paragraph-based formatting is recorded for the table style at all, and an author must apply the appropriate paragraph style to each individual table cell.

Keep Horizontal Cell Alignment

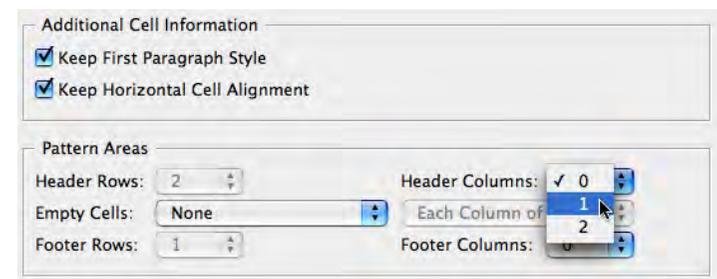
This option records the horizontal alignment of each cell in the current table and applies these alignment settings to new tables. You can use it to enforce the cell alignment in each new table. (This can be useful in financial tables where the cell alignments are unlikely to match those provided by default when creating the content.)

Pattern Areas

This section defines how the table style's header and footer row and column behave. If the table design from which you are generating the new Table Style already contains header and footer columns, these settings will be grayed out, as



Layout Settings category.



Additional Cell Information and Pattern Areas.

the *Use Selected Table as Example* option has already filtered out these settings from the table itself.

Header and Footer Rows

Header Rows defines the number of rows formatted differently at the top of a table. Header Rows do not need to have a similar design for each row. For example if your table design contains a heading and subheading row, then set the number of Header Rows to '2'. A table can have a maximum of '25' header rows. Header Row information is accessed from the table design that is used as the source of the Table Style and cannot be changed in the Table Styles dialog. The number of rows is therefore listed grayed out.

Footer Rows defines the number of rows formatted differently at the bottom of a table. Footer Rows do not need to have a similar design for each row. For example if your table design contains a sub-footer and footer row, then set the number of Footer Rows to '2'. A table can have a maximum of '25' footer rows. Footer Row information is accessed from the table design that is used as the source of the Table Style and cannot be changed in the Table Styles dialog. The number of rows is therefore listed grayed out.

If the Typefi Table Style contains header rows and the table inserted by the author in Word contains more header rows than the Table Style, the header rows data from the style is applied cyclically on the additional header rows in the table.

Let's say the Table Style defines 2 header rows and the inserted table contains 5 header rows, the header row data would format as follows:

In other words, row specifications from the Table Style for header, body and footer rows are applied in a cyclic way on the corresponding table rows.

Header and Footer Columns

Header Columns define the number of columns on from the left side of the table that are defined with as being different from the rest of the columns in the current table style. As InDesign only supports a single Header Column, you must manually set the number of Header Columns when basing your Table Style on an InDesign table design.

Footer Columns set the number of columns on the right side of the table that are formatted differently. As InDesign only supports a single Footer Column, you must manually set the number of Footer Columns when basing your Table Style on an

head row 1					
head row 2					
body row	body row	body row	head row 3	head row 3	head row 3
body row	body row	body row	head row 4	head row 4	head row 4
body row	body row	body row	head row 5	head row 5	head row 5
body row					
body row					

Defined table style (left), applied to table with 5 header rows (right)

Header columns and footer columns are always maintained in the output table regardless of the number of body columns

InDesign table design. Just like for Header and Footer Rows, the Footer Column designs for each column can be different.

In contrast to Header and Footer Row behavior, where an inserted table can contain more Header or Footer Rows than the Table Style, Header and Footer Columns behave differently. Header and Footer Column formatting is not applied cyclically, Body Columns are applied cyclically. When designing prototype tables containing multiple Header and Footer Columns, ensure that the table design contains at least one additional column that sets the Body Column formatting.

When tables are inserted and formatted using a Table Style containing Header or Column rows keep the following in mind:

- 1) The first 'h' columns of the table will have the Header Columns settings applied that were captured by the Table Style, but not more than there are columns in the table.
- 2) If there are more than 'h' columns in the table, the last 'f' columns will have the Footer Columns settings applied that were captured by the Tables Style (from last column toward the first column), but not more than the number of table columns remaining after step 1.
- 3) The columns left after applying Header and Footer Columns formatting are the remaining b Body Columns. Body Column formatting is applied cyclically from first body column to last body column.

Empty Cells

Empty Cells settings control the cell formatting of cells in a table that contain no data. For instance, they might contain a different cell fill or stroke or inclusion of diagonal lines. To define how Empty Cells are formatted select which cell or cells in the Selected Table are formatted as an empty cell.

Empty Cell formatting is applied during page composition and editing in InDesign and applies only to normal tables and will not be applied for tables marked as prototype tables.

The Empty Cell settings are:

- **None** : There is no specific formatting for Empty Cells defined in the selected table.

h=number of header columns defined in the Table Style

f=number of footer columns defined in the Table Style

b=number of body columns

- **First Body Row:** The prototype table defines an empty cell layout in the first body row of the table.
- **Last Body Row:** The prototype table defines an empty cell layout in the last body row of the table.

With either First Body Row or Last Body Row selected, an additional three options become available for selection:

- **First Column of Row:** Empty cell formatting defined by the single cell of the first column of the specified body row of the prototype table.
- **Each Column of Row:** Empty cell formatting is defined column specific by each cell of the specified body row of the prototype table.
- **Last Column of Row:** Empty cell formatting is only defined by the single cell of the last column of the specified body row of the prototype table.

In a table that gets the table style applied, there is **either** a single empty cell style used for every cell of the table that has no content (no matter in which column the empty table cell appears), **or** the empty cell style format is determined by the table column that corresponds to the column in the table style's prototype table. In that case, header and footer columns are also considered, and the repeating empty cell style selection applies to them as well.

Empty Cells defined in prototype table		
	First Body Row	Last Body Row
First Column of Row	Empty cell is defined in the first row of the table by giving the very first cell of that row the defined formatting. During page composition empty cells are formatted using the cell attributes of the first body column of the first body row of the prototype table.	During page composition empty cells are formatted using the cell attributes of the first body column of the last body row of the prototype table.
Last Column of Row	Empty cell is defined in the first row of the table by giving the very last cell of that row the defined formatting. During page composition empty cells are formatted using the cell attributes of the last body column of the first body row of the prototype table.	Empty cell is defined in the last row of the table by giving the very last cell of that row the defined formatting. During page composition empty cells are formatted using the cell attributes of the last body column of the last body row of the prototype table.

Empty Cells defined in prototype table		
	First Body Row	Last Body Row
Each Column of Row	Empty cell formatting is defined in each cell of the first row of the table.	Empty cell formatting is defined in each cell of the last row of the table.
Last Column of Row	Empty cell is defined in the first row of the table by giving the very last cell of that row the defined formatting. During page composition empty cells are formatted using the cell attributes of the last body column of the first body row of the prototype table.	Empty cell is defined in the last row of the table by giving the very last cell of that row the defined formatting. During page composition empty cells are formatted using the cell attributes of the last body column of the last body row of the prototype table.

Width Settings

Width Settings relate to the width of the table itself as well as the column widths.

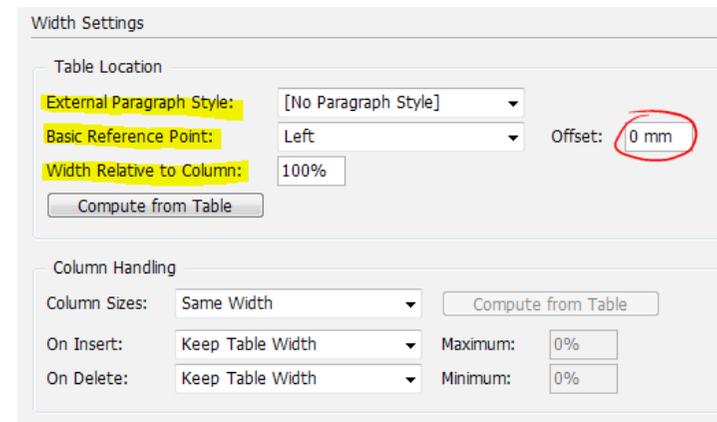
Table Location

Tables are always placed in a paragraph of their own. The **Table Location** setting controls the horizontal positioning of the table within this paragraph as well as overall width of the table in relation to its parent Text Frame.

The horizontal positioning is controlled via an External Paragraph Style or Basic Reference Point setting.

External Paragraph Style

The **External Paragraph Style** setting places the table in a paragraph that is formatted using a standard InDesign paragraph style during page composition. This paragraph style controls not only the alignment (left, center, right etc.) and indentation setting (left indent, right indent etc.), it can also define other settings available to paragraph styles, such as space before/after, widow/orphan protection etc. These are settings you can't include when using the Basic Reference Point option.



Width Settings category including the choice of External Paragraph Style

Column Handling

You can specify that the table creates columns of equal widths, or creates a table with specific widths you must set first, and then click the 'Compute From Table' button to store those widths. Then, when a table is inserted using Writer, those widths will be maintained (if possible) up to the limits of the page layout.

Basic Reference Point

When the External Paragraph Style is set to **[No Paragraph Style]**, the horizontal positioning within the Text Frame is purely controlled through the **Basic Reference Point** settings.

The **Reference Point** sets the horizontal alignment to either **Left**, **Center** or **Right**.

The **Offset** value sets the indentation. A **Positive Offset** value equals a left indent, a **Negative Offset** value equals a right indent.

For example: when the Basic Reference Point is set to Left, and the Offset value is 0.125 in, the table will be moved 0.125 in from the left edge of the Text Frame in which it is positioned.

Width Relative to Frame: Defines the total width of the table relative to the parent Text Frame width.

Column Sizes:

Same Width: All columns will have the same width by default. This is similar to InDesign's default when creating a new table through "Table->Insert Table"

Specific Width: The table prototype stores the individual width for each column relative to the width of the prototype table. 'Compute From Table' will be active if the selected table uses any different column width settings.

Click **Compute From Table** to calculate the Table Location settings based on the currently selected table.

On Insert:

Keep Table Width: The width of all columns gets evenly reduced to fit the columns into the intended table width.

Column Handling			
Column Sizes:	Specific Width	Compute from Table	
On Insert:	Keep Column Widths	Maximum:	91.68%
On Delete:	Keep Column Widths	Minimum:	0%

Choosing to maintain the column widths of the Table – up to the specified percentage of column width.

Keep Column Width: Additional columns may be added to the existing body columns. The width of the columns directly used from the prototype stays the same. 'Maximum' will be active in that case and will be greater than or equal to the 'Width Relative to Column' in the table location setting, e.g. the user specifies to what extent the overall table width might increase.

On Delete:

Keep Table Width: The widths of all columns get evenly increased to have the columns fit into the intended table width.

Keep Column Width: The width of the remaining columns from the prototype stays the same. 'Minimum' will be active in that case and will be less than or equal to the 'Width Relative to Column' in the table location setting, e.g. the user specifies to what extent the overall table width might decrease.

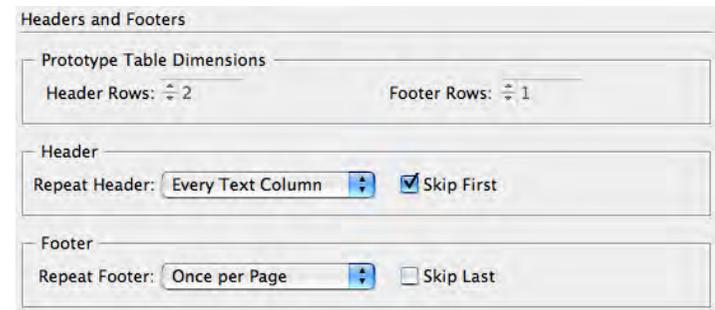
Headers and Footers

Headers are always the top row(s) of a table and can be formatted to repeat across columns, frames or pages. **Footers** are the bottom table row(s) and can also be repeated. Refer to the Adobe InDesign User Guide for more extensive information on Headers and Footers.

If you base your new table style on a table that contains InDesign header and footer rows, the number of header and footer row settings will be entered automatically.

When the author inserts a table of this style with Typefi Writer and defines a number of headers and footers, the table that is generated during the page composition automatically formats the header and footer rows based on the Table Style settings. For example, when a Table Style is designed with two header rows (each with a different format) and a table with four header rows is inserted, the four header rows will be formatted.

If the author does not define the header/footer information in Word, only body rows are created during page composition for the selected Table Style.



Headers and Footers category.

Typefi Cross-References

Cross-references are textual references within a publication that direct the reader to source text located elsewhere in the same publication. An example of a cross-reference would be a 'see also ...' source reference that refers to a chapter title or page number the reader may refer to for additional information.

Cross-references may be inserted by an author using Typefi Writer and appear fully formatted in the paginated InDesign document. They can also be inserted or edited post-pagination in the InDesign document.

The Typefi Designer plug-in allows for easy editing and creation of cross-references based on selection of cross-reference sources that point to the following categories:

- **Project Field:** such as a Book Title. (See also [Project Fields, p. 95](#)).
- **Section Field:** such as a particular Chapter Title or Number. (See also [Section Fields, p. 96](#)).
- **Paragraphs:** text formatted using a selected paragraph style, such as a Heading, Caption etc. The cross-reference actually points to the start of a selected paragraph formatted with the selected paragraph style.
- **Bookmarks:** references pointing to InDesign bookmarks. Bookmarks created as InDesign bookmarks can point to page, graphic or text references.

Note: Bookmarks created from highlighted text in InDesign insert a single reference marker at the start of the text as a Bookmark. However, where bookmarks were originally created in Word based on some highlighted text, the resulting InDesign file that is published through Typefi Publish will display Bookmark markers around the highlighted text.

Inserting a Cross-reference

A cross-reference may use selected text as a starting point, or use source text or page number details from the selected cross-reference source. Cross-references inserted in InDesign can point to any currently open document. The active document is the root of the cross-reference source.

To insert a new cross-reference either highlight text or place the text cursor at the cross-reference insertion point:

- Highlight text if you'd like to turn the text into a cross-reference hyperlink or if you want to ensure that the text is not updated even when the source changes.
- Use the text insertion point option if you'd like to copy across the source text derived from the selected cross-reference source.
- Next, select **Typefi Cross-Reference > Insert Cross-Reference...** from the **Type** menu.

The **Insert Cross-Reference** dialog box is displayed.

Project Field Cross-Reference

To insert a cross-reference to a Project Field:

- Set the **Category** to **Project Fields**.
- Next, select the relevant Field name from the **Type** menu.

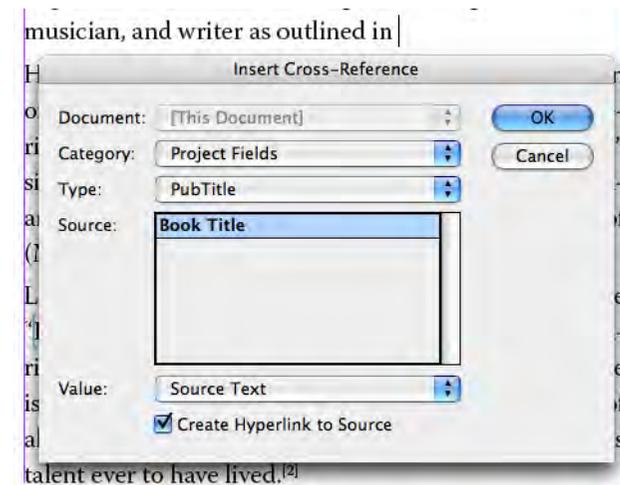
The **Source** indicates the value of the Project Field.

Set the **Value** to:

- **Source Text**, to copy the Project Field value to the insertion point of the cross-reference.
- **Source Page Number**, to copy the Project Field page number to the insertion point of the cross-reference. This page reference points to the first page of the selected document.
- **Selected Text** to use the currently highlighted text as the source for the cross-references.

To turn the cross-reference into an interactive hyperlink that can be used in the PDF-output:

- Select **Create Hyperlink to Source**.
- Click **OK**, to insert the Project Field cross-reference in the InDesign document.



Insertion of Project Field cross-reference and cross-reference source text.

musician, and writer as outlined in **da Vinci, Artist and Scientist**.

Project Field cross-reference inserted.

Section Field Cross-Reference

To insert a cross-reference to a Section Field, set the **Category** to **Section Fields**. Next, select the relevant Field name from the **Type** pop-up menu.

In the example above, we point to a different **Document** and select the ChapterTitle Section Field. The **Source** indicates the available ChapterTitle sections. Select the appropriate cross-reference source from the Source list. For documents containing multiple sections, the source list would list different values for the selected Section Field.

Set the **Value** to:

- **Source Text**, to copy the Section Field value to the insertion point of the cross-reference.
- **Source Page Number**, to copy the Section Field page number to the insertion point of the cross-reference. This page reference points to the first page of the section.
- **Selected Text** to use the currently highlighted text as the source for the cross-references.

To turn the cross-reference into an interactive hyperlink that can be used in the PDF-output:

- Select **Create Hyperlink to Source**.
- Click **OK**, to insert the Section Field cross-reference in the InDesign document.

Paragraphs

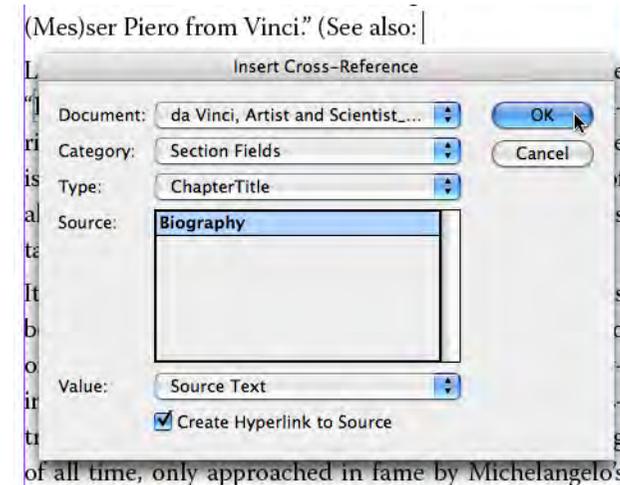
To insert a cross-reference that points to a paragraph:

- Set the **Category** to **Paragraphs**.
- Next, select the relevant paragraph style name from the **Type** menu.

In the example shown, the cross-reference will point to a Heading 1. The **Source** lists all paragraphs that are formatted using the Heading 1 paragraph style. Select the appropriate cross-reference source (paragraph) from the Source list.

Set the **Value** to:

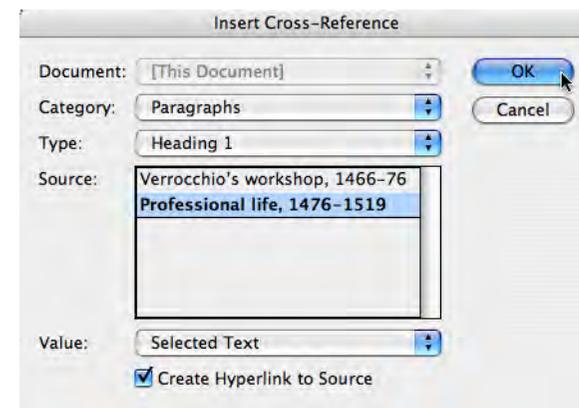
- **Source Text**, to copy the Paragraph value to the insertion point of the cross-reference. Please note that tables, images and Inline Elements are disregarded, whereas paragraph end markers are converted to forced line breaks. In addition,



Insertion of Section Field cross-reference and cross-reference source text.

(Mes)ser Piero from Vinci." (See also: [Biography](#), p.5).

Section Field example that points to ChapterTitle and Page Number.



Insertion of paragraph cross-reference.

any other markers, such as cross-references, bookmarks or hyperlinks that are part of the selected paragraph will be ignored.

- **Source Page Number**, to copy the Paragraph page number to the insertion point of the cross-reference.
- **Selected Text** to use the currently highlighted text as the source for the cross-references.

To turn the cross-reference into an interactive hyperlink that can be used in the PDF-output:

- Select **Create Hyperlink to Source**.
- Click **OK**, to insert the paragraph cross-reference in the InDesign document.

Bookmarks

To insert a cross-reference that points to an InDesign bookmark, you must first ensure that InDesign bookmarks are created.

- Set the **Category** to **Bookmarks**.
- Next, select the relevant Bookmark text from the **Type** pop-up menu.

In the example above the cross-reference will point to the “Early life” bookmark. The **Source** will display the names of all available InDesign bookmarks.

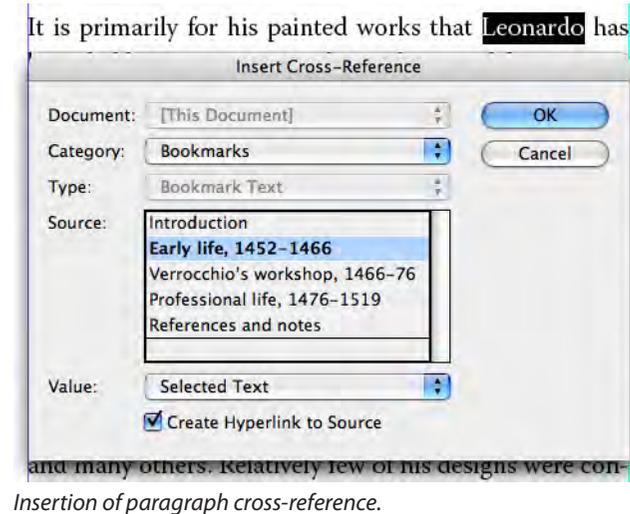
- Select the appropriate cross-reference source (name) from the Source list.

Set the **Value** to:

- **Source Text**, to copy the Bookmark value to the insertion point of the cross-reference. Please note that tables, images and Inline Elements are disregarded, whereas paragraph end markers are converted to forced line breaks. In addition, any other markers, such as cross-references, bookmarks or hyperlinks that are part of the selected paragraph will be ignored.
- **Source Page Number**, to copy the Bookmark page number to the insertion point of the cross-reference.
- **Selected Text** to use the currently highlighted text as the source for the cross-references.

To turn the cross-reference into an interactive hyperlink that can be used in the PDF-output:

- Select **Create Hyperlink to Source**.
- Click **OK**, to insert the Bookmark cross-reference in the InDesign document.



It is primarily for his painted works that **Leonardo** has

Cross-reference added.

InDesign Bookmarks and Hyperlinks

Without the Typefi Designer plug-ins installed, InDesign will handle bookmarks differently to Typefi. Whereas InDesign will only mark a single location for the bookmark reference, the installation of Designer will add start and end markers for the Bookmark source text.

To create an InDesign bookmark:

- Select **Window > Interactive > Bookmarks** panel.
- Highlight the source text and select **New Bookmark** from the panel menu. Alternatively click the New icon. Brown Typefi start and end markers appear around the bookmark source text.

Hyperlinks

When cross-references are set to create a hyperlink, InDesign hyperlinks are used. However, post-editing in InDesign might see the requirement to insert additional InDesign hyperlinks, such as URL links. These can be inserted without any issues, and will round-trip as a normal hyperlink. In contrast, hyperlinks created from cross-references will remain cross-references that contain additional information that turns them into a hyperlink during page composition.

For more detailed information on InDesign bookmarks and hyperlinks please refer to InDesign Help.

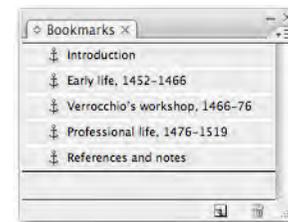
Word Hyperlinks: Word documents containing native Word hyperlinks for web and email addresses are automatically converted to InDesign hyperlinks during page composition. To format these types of hyperlinks differently, add a "Hyperlink" character style to the InDesign template, and apply the style to the hyperlinked text.

Editing a Cross-reference

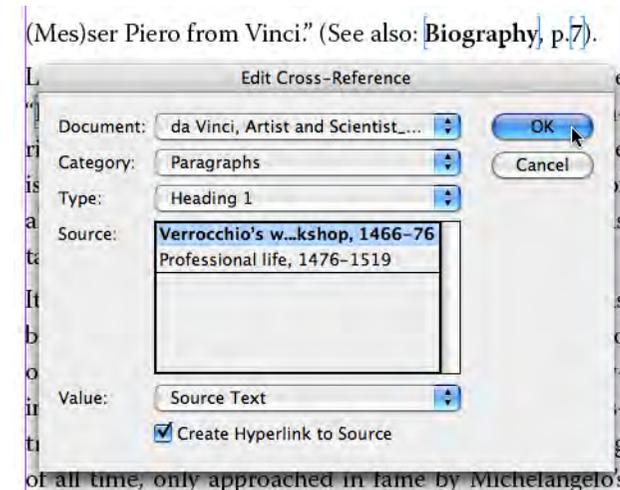
To edit an existing cross-reference:

- Start by inserting the text cursor anywhere in the cross-reference text (between the blue cross-reference markers).

In our example we'll edit the Section Field cross-reference to a Paragraph cross-reference.



InDesign Bookmarks panel.



Editing a cross-reference.

- Next, select **Typefi Cross-Reference > Edit Cross-Reference...** from the **Type menu**.

The **Edit Cross-Reference** dialog box is displayed.

- Make the appropriate changes to **Document, Category, Type, Source, Value** settings.
- Click **OK**.

The cross-reference has now been updated to reflect the edit.

Update Selected Cross-references

To update a selected cross-reference, start by inserting the text cursor anywhere in the cross-reference text (between the blue cross-reference markers).

In our example we'll update the page number. Next, select **Typefi Cross-Reference > Update Selected Cross-Reference** from the **Type menu**.

The selected cross-reference is now updated. In the above example the page number has been changed to reflect the new position of the Biography cross-reference.

Update all Document Cross-references

When editing content in the InDesign post-pagination process, cross-references can become outdated. Page numbers might no longer be correctly reflected due to insertion of new content. Source text might no longer be up to date, due to editorial changes to headings etc.

To **Update all Document Cross-References** for the active InDesign document:

- Select **Typefi Cross-Reference > Update all Document Cross-References** from the **Type menu**.

(Mes)ser Piero from Vinci." (See also: [Verrocchio's workshop, 1466-76], p.[10]).

After editing.

(Mes)ser Piero from Vinci." (See also: [Biography], p.[5]).

Cursor placed in the page number cross-reference text.

(Mes)ser Piero from Vinci." (See also: [Biography], p.[7]).

Page number updated.

Footnotes and Endnotes

Footnotes are generally notes that have a reference in the text that are placed at the bottom of a page. In contrast to endnotes, which generally are placed at the end of a document.

Footnotes

Footnotes are used to add some additional information about something referred to in the main text and are generally numbered in-text and then referenced by that number at the bottom of the page.

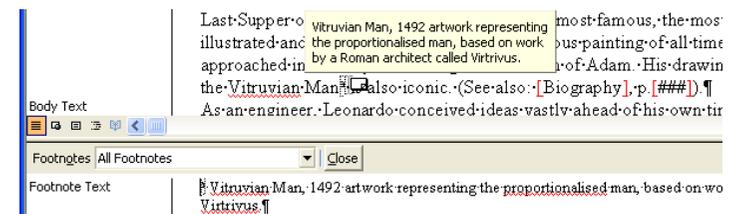
Footnotes appear at the bottom of the Main Story text frame during page composition.

Typefi Publish has support for both Word and InDesign footnotes:

Word Footnotes

Footnotes inserted in Microsoft Word are passed through to the paginated InDesign documents and are formatted using the settings for **Type > Document Footnote Options...** This means that none of the Word footnote settings will come across in InDesign.

When a footnote is inserted in Word, Word automatically generates a Footnote Reference and Hyperlink character style. The **Footnote Reference** in Word formats the reference number in the text. As best practice, you might want to add similarly named character styles to the InDesign template.



Footnote inserted in Word.

The footnotes themselves in Word are formatted using the **Footnote Text** paragraph style. Consider using a similarly named style in InDesign when defining the Document Footnote Options...

Although Word supports the use of footnotes inside tables, InDesign does not, which means that such footnotes are ignored by the Typefi Engine and consequently won't appear.

In addition, Word supports continuous footnote numbering across sections. InDesign only supports numbering across a section, spread or page. This means that for a Word document that contains multiple sections and continuous footnote numbering, the footnote numbering will be reset according to the InDesign footnote options...

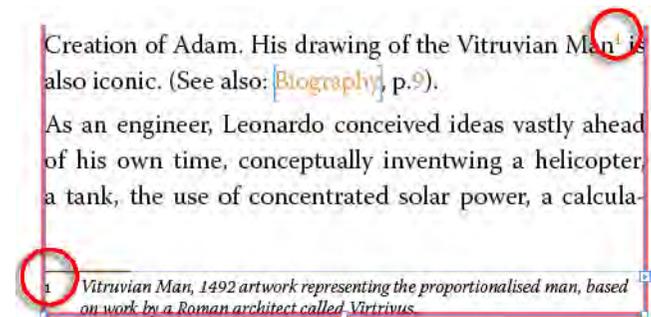
Although InDesign doesn't support continuous footnote numbering across sections, consider setting the InDesign 'Output for a Job Option' to 'Book' in cases where footnotes must be numbered continuously. A script addition to the job option could then automatically set the *Start At* footnote numbering for each InDesign document that is published as part of the book. Alternatively, you could make this change manually after-page composition.

InDesign Footnotes

We've already seen that InDesign footnotes will always restart their numbering at the beginning of each section, spread or page. In addition to this restriction, InDesign footnotes always appear in the same text frame as the in-text reference and do not span multiple columns unless the footnote reference is in a paragraph that spans multiple columns. This means, for example, that footnotes inserted as part of an Element by the author, will sit within the Element Content frame.

InDesign further lacks support for use of footnotes in tables, or nesting of footnotes within footnotes.

Footnotes further are not affected by Text Wrap, which means that where they interact with Floating Elements with Text Wrap, the Footnote Text will not wrap around the Element.



Footnote in InDesign.

Consider defining a separate footnote Typefi Element, for those design scenarios that don't meet the out-of-the box InDesign footnote capabilities.

Endnotes

InDesign has no support for endnotes. However, where endnotes are inserted by the author in Word, endnotes are published as footnotes, and numbered sequentially based on the InDesign template's Document Footnote Options . The ***Endnote Reference*** in Word formats the reference number in the text. As best practice, you might want to add similarly-named character styles to the InDesign template and format the endnotes using the ***Endnote Text*** paragraph style.

Typefi Preferences

Typefi Designer adds five additional preference categories to InDesign's Preference dialog. To access Typefi preference categories, select InDesign's Preferences from the Edit (PC) or InDesign menu (Mac).

Typefi AutoFit

The *Typefi AutoFit* preferences ensure that AutoFit relationships and resize settings work dynamically. AutoFit is enabled by default (see also [Typefi AutoFit, p. 65](#)).

Disabling Typefi AutoFit means that AutoFit relationships and resize settings don't work interactively in the InDesign template. In addition, disabling the setting could prevent the proper handling of AutoFit relationships and resizing of frames during page-composition.

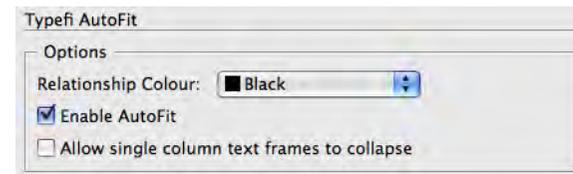
A situation in which disabling AutoFit could be useful is when a lot of page items with AutoFit relations need to be re-arranged without getting the relations updated (or also if auto-resize or even limit checks might temporarily hinder you in some tasks).

Allow single column text frames to collapse is a setting that is disabled by default. Enabling this setting allows single column text frames with a single column to shrink to 3pt height (or as close as possible) when AutoFit is enabled. With the default setting as disabled, a single column text frame will use a minimum height depending on the font height for the first character of a text frame, i.e. the text cursor will then be completely visible if the user clicks in such an empty text frame.

Most of the preferences are stored per document. If no document is open, the preferences are stored as InDesign application-wide default preferences that are applied for new documents.

This has an effect on the 'Typefi Borders' and 'Typefi Anchors' preferences, which show a check-box to save the document preferences as InDesign application-wide preferences, and where 'Use Defaults' means to use the InDesign application-wide preference settings in case the preferences of a document are edited, but to use the Typefi default settings in case the InDesign application-wide preferences are edited.

The only preference pane where the preference settings are not necessarily document-wide is the 'Typefi Preferences' pane.



InDesign Preferences > Typefi AutoFit.

Typefi Cross-References

The *Typefi Cross-References* preferences define how cross-references are formatted during the page composition process as well as when editing, updating or inserting cross-references.

Unresolved Cross-References

Unresolved Cross-References are those cross-references for which the source is not available. This could be because the referenced item, such as a bookmark, no longer exists or the source document itself is not available. The referenced character style is applied when Update References cannot locate the source.

To make these cross-references stand out after pagination, consider formatting the *Unresolved Cross-References* with a separate Character Style. Select the preferred *Style* from the *Unresolved-Cross-Reference Style* menu to assign such a style. Leaving the *Style* setting set *[None]*, formats the cross-reference according to the paragraph style to which it belongs.

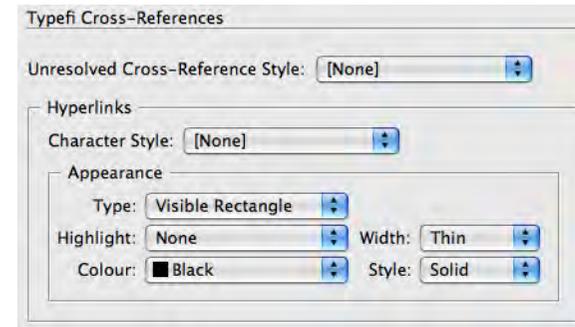
Hyperlinks

Cross-references can also have hyperlinks associated with them. Hyperlinks enable a user of a document to jump from the hyperlink location to a source elsewhere in the documents and can be inserted as interactive links in a PDF created from InDesign.

The Hyperlink *Character Style* setting only affects cross-references that have hyperlinks associated with them and formats these cross-references with the attributes defined by the character style, not the style itself. This means that the character style is not actually applied to the text.

The Hyperlinks *Appearance* settings have an impact on cross-references that are hyperlinks. They do not have an impact on normal InDesign hyperlinks.

The Appearance *Type* sets the visibility of the hyperlinks. A visible hyperlink is marked by a rectangle surrounding the hyperlink text. The appearance of this rectangle is controlled by the *Width*, *Color* and *Style* settings. The *Highlight* setting relates to the appearance of the link when the link is clicked. *Invert* will reverse the colors, *Outline* will display a stroked rectangle and *Inset* will give the appearance of a button being pushed when the link is clicked.



InDesign Preferences > Typefi Cross-References

Note: InDesign hyperlinks are not formatted by this feature.

I only two incidents of his
regarded as a premonition,
Highlight set to Inset.

Typefi Borders

Typefi Borders are the visual appearance of Typefi Frames and Element Prototypes and Instances (see also [Element Prototype, p. 113](#)). Typefi frames are distinguished from InDesign frames through their border color, width and opacity.

The **Typefi Preferences** setting for **Typefi Borders** sets the frame border appearances as well as Element Instance and Prototype appearance. General border width and transparency percentage may be changed.

To edit the Typefi Border settings:

- In InDesign Preferences choose **Typefi Borders**.
- Set the default Stroke **Weight** for the Borders.
- Set the default **Opacity** for the Borders.

To override the default opacity for certain Typefi Borders:

- Enter an Opacity percentage for the individual Border Type.

To View Typefi Borders in InDesign:

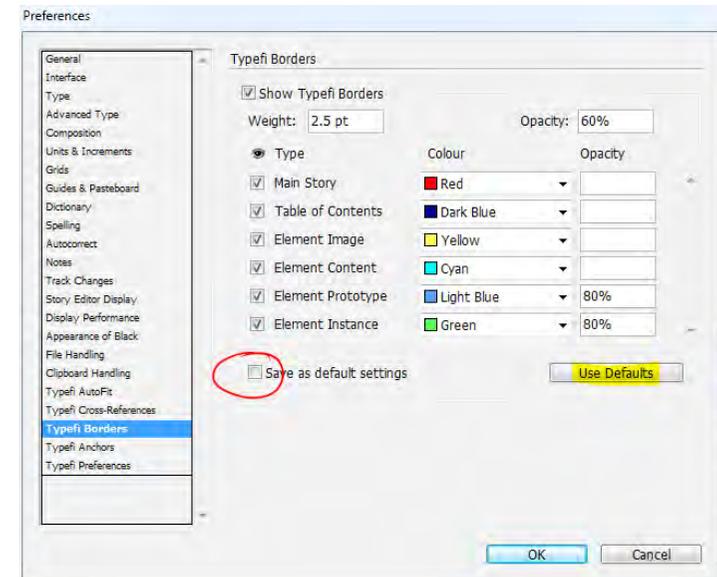
- Enable **Show Typefi Borders** and ensure **View > Show Frame Edges** in InDesign is selected, also ensure that **View > Overprint Preview** is disabled and **View > Screen Mode** is set to Normal.
- Alternatively select **Show Frames** from the **Typefi Elements** or **Frames** panel menu.

To View a selective range of Typefi Borders in InDesign:

- Enable or Disable the View setting for individual Border Types using the checkboxes in the Typefi Borders preferences.
- Enable **Show Typefi Borders**.

To Reset the Typefi Border appearances to their default stroke weight, opacity and color:

- Choose InDesign **Preferences > Typefi Borders**.
- Click **Use Defaults**.



InDesign Preferences > Typefi Borders.

If a document is open, the panel has an additional check-box: 'Save as default settings'. In the context of an open document, 'Use Defaults' means to use the settings that had been used as the InDesign application-wide default settings.

Typefi Anchors

Typefi Anchors are the lines and markers that connect an Element with their reference in the Text.

The Typefi Anchor preferences define the color, and weight of the lines and markers.

To edit the color of the Anchor markers:

- Click the color drop-down.
- Pick a color from the list.

Marker and Line stroke weight and opacity of color can be changed:

Anchor Marker

The **Anchor Marker** is the circular mark linked to the Element, and its size can be increased to a maximum circular dot of 8pt.

To edit the Anchor Marker:

- Change the **Weight** and **Opacity** settings in the **Typefi Anchor** preferences.

Anchor Line

The **Anchor Line** is the line that connects the Marker to its reference point in the text, it can be increased to a maximum stroke weight of 8pt.

To edit the Line:

- Change the **Weight** and **Opacity** settings in the Typefi Anchor preferences.

To View Typefi Anchors in InDesign:

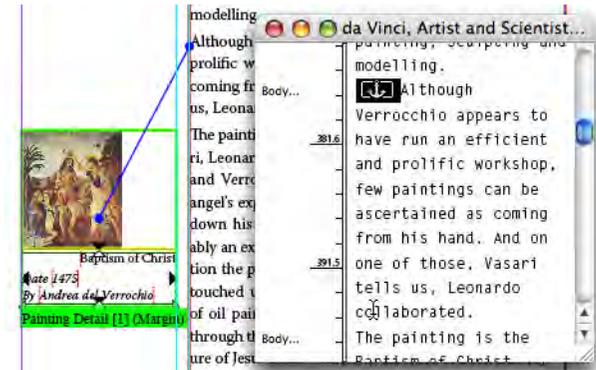
- Enable or Disable the Show Typefi Anchors setting.

To store the new settings as InDesign defaults:

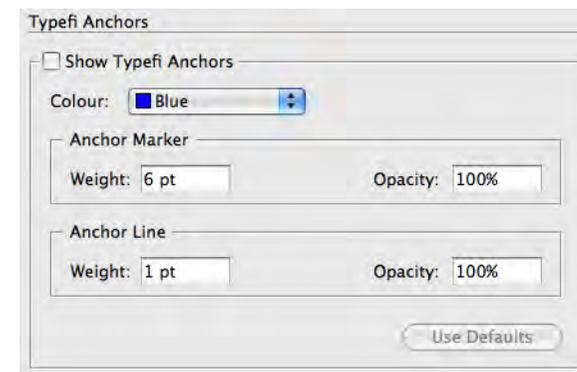
- Click Save as Default.

To restore the Typefi Anchor preferences to their original settings:

- Click **Use Defaults**.



Typefi Element and Anchor line and marker.



InDesign Preferences > Typefi Anchors.

Typefi Preferences

The **Typefi Preferences** contain settings for Pagination Options and Interactive Options.

Pagination Options

Enabling **Show Document during Pagination** is a setting applicable only when using InDesign Desktop during Page Composition. Generally all jobs are processed on Typefi Server, and enabling this setting has no effect.

When enabled you'll be able to see Typefi Publish in action and witness the page composition process. It will display text and content run in and formatting of content, and show Typefi making layout decisions when placing Floating Elements and add more pages until all content has been processed and placed.

Where jobs are processed on by Typefi Server and InDesign Server you'll not see any effect when enabling this option.

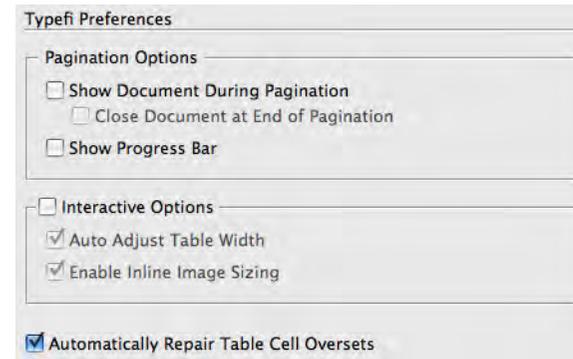
With the **Close Document at End of Pagination** enabled, the compiled InDesign file is closed at the end of the composition process. The file remains open if this option is left disabled.

Show Progress Bar: displays a progress dialog during the pagination process.

Interactive Options

The **Interactive Options** setting is disabled by default. Enabling the Interactive Options and **Auto Adjust Table Width** or **Enable Inline Image Sizing** can generate time consuming operations. So when would you enable or disable these settings?

- **Disabled:** If no post-page composition processing occurs.
- **Disabled:** If table widths or Inline image sizes are not allowed to change post-page composition.
- **Disabled:** When predominantly editing content in InDesign post-page composition, if the size of tables or Inline images is not relevant during the editing process. In cases where the resizing of these objects is important, the setting(s) should be enabled.
- **Enabled:** If the main task is to design and test the functionality of InDesign templates, for example to discover how the sizing of tables or Inline images behaves during pagination.



InDesign Preferences > Typefi Preferences



Progress Bar in InDesign

- **Negotiable:** A number of Script-driven post-page composition editing tasks are performed through. The selection of this setting would depend on the preferred post-editing result.

Auto Adjust Table Width: When enabled, tables that have Typefi Table Styles applied to them will automatically adjust in width as they flow into wider or narrower Text Frames as a result of post-page composition processing.

Enable Inline Image Sizing: When enabled, changes made to Inline Image Settings (see [Typefi Inline Image Settings, p. 59](#)) are automatically reflected in the InDesign document. For instance, imagine an Inline image setting prescribes that the image is 50% of the Text Frame width. If the Inline image setting changes to 60%, the image resizes dynamically. In addition if the text flows into a Text Frame that is wider or narrower, the image will resize accordingly.

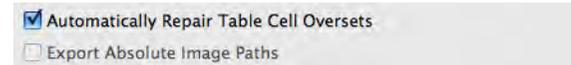
Automatically Repair Table Cell Oversets

This preference setting is enabled by default and pagination occurs as it has in previous Typefi Publish releases. However, there might be circumstances where Typefi Designer encounters a situation where the automatic adjusting of cell widths leads to a generated table that differs in width between the PDF and the InDesign document.

Disabling this default preference avoids inconsistent table width, but may lead to certain table cells becoming overset.

Export Absolute Image Paths

The **Export Absolute Image Paths** setting is only visible in Typefi Preferences when editing an InDesign file. When enabled, the setting indicates that absolute paths to images were used when the document was created using Typefi Publish.



Export Absolute Image Path preference setting.

Testing your Template

In order to ensure that your Project template is fully functional, test the template. Testing requires access to content and set-up of job options.

To test a template, create a New Typefi Document with the Typefi Writer in Word and insert the sections you'd like to test and some sample text and Elements etc. in each section. Use the Print Typefi Document command to test to run the content into the template. From the Jobs section of your project, check out the InDesign file(.indd) that was generated and review this file.

(It is also possible to start-out with an InDesign document; apply the Typefi specific mark-up as far as the Typefi additions to the InDesign UI allow; and use round-tripping to get the initial content for check-in in the server. The only Typefi feature that cannot be created this way is Conditions).

Please refer to the Typefi Writer part of this User Guide to learn how to create test content. Refer to the Typefi Projects part of this User Guide to learn how to create Job Options.

Typefi Publish

Typefi Publish User Guide - Writer

June 2011



Introducing Typefi Writer

Typefi Writer is an add-in for Microsoft Word that makes it easy for you to create structured content for the Typefi Publish system using Microsoft Word. It allows you to use professional layouts from Adobe InDesign, and apply them to Microsoft Word documents without the need to understand XML (Extensible Markup Language) or Adobe InDesign. And with just a couple of clicks, you can convert a Word document to PDF format to see what the publication will look like in its final form.

Typefi Writer works by attaching a Typefi Project to a Word document. A Typefi Project contains paragraph and character styles, sections, elements, tables and more. Once a project is attached, you use Typefi Writer to apply simple markup to your document to identify different parts of the publication.

A Typefi Writer document in Microsoft Word is not formatted like the final publication, but by using the Typefi Print command, you can generate a PDF file to see exactly how the final product will look.

You may format the styles in Word to look close to the final product (font, color, size, spacing, etc.), but it is not necessary. Avoid manually entering numbers, bullets, and similar content, since the InDesign template will add these automatically as part of the paragraph styles.

Typefi Toolbar

The Typefi Toolbar provides easy access to most Typefi Writer commands and appears in the Add-Ins tab at the top of the screen.



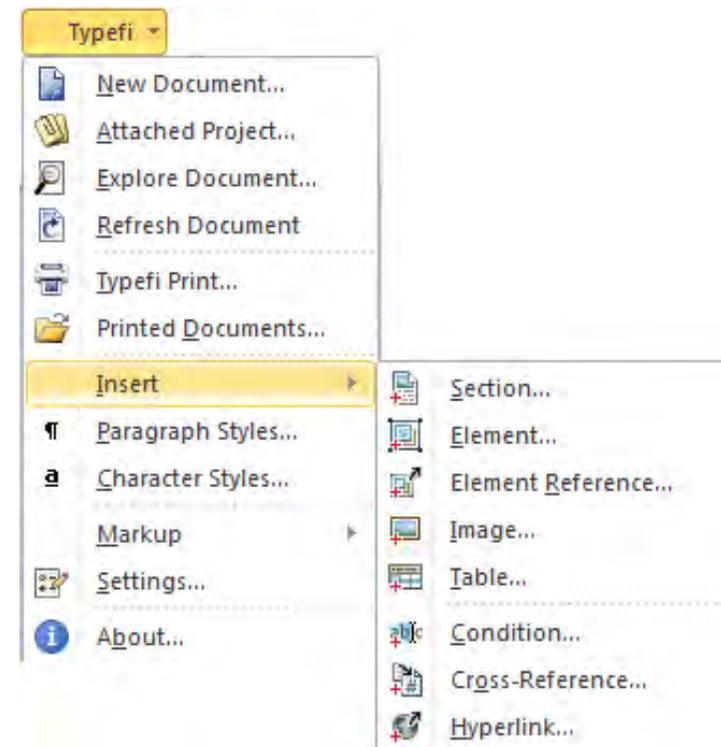
Typefi toolbar (see button names below)

The Typefi toolbar provides one-click access to the following commands:

- A New Document
- B Attached Project
- C Typefi Print
- D Document Explorer
- F Refresh Document
- G Insert Section
- H Insert Element
- I Insert Image
- J Insert Table
- K Paragraph Styles
- L Character Styles
- M Insert Condition
- N Insert Element Reference
- O Insert Cross-Reference
- P Insert Hyperlink

Typefi Menu

The Typefi Menu provides access to all of the Writer features and commands and also displays the keyboard shortcuts that can be used to access certain commands. It appears in the 'Add-Ins' panel.



Typefi Writer menu.

Typefi Writer Settings

The Typefi Writer Settings allow you to control settings for the Typefi Writer Add-in. You can create a connection to the Typefi Publish Server; choose a storage location for PDFs published from Word; and choose whether images will appear or not.

To access the Typefi Writer Settings:

- Select Add-Ins > Typefi > Settings...

The Typefi Writer Settings dialog appears.

General

The General Tab in the Typefi Writer Settings dialog is used to:

- manage connections to the Typefi Publish Server
- define the server response timeout; and
- specify the location in which PDF files are stored when Word documents are published to Typefi Publish.

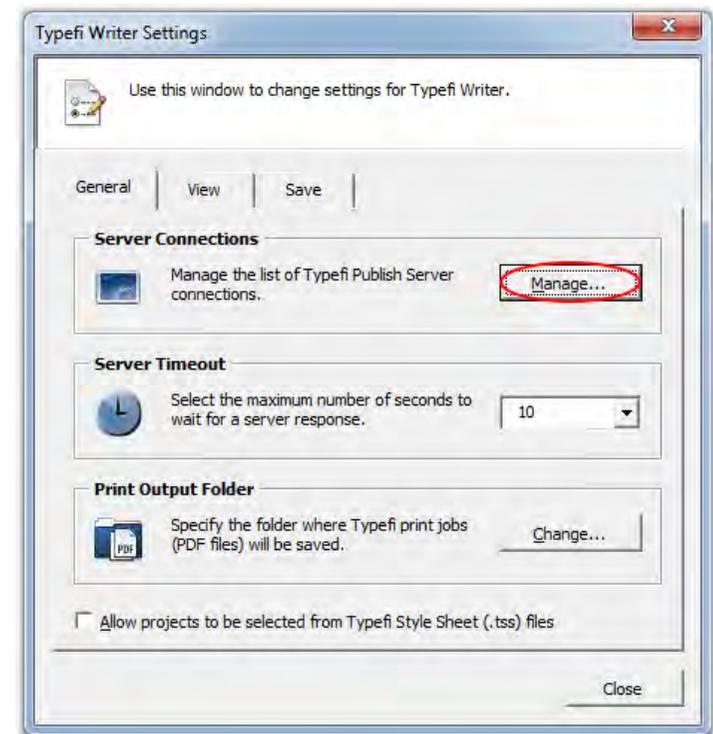
Server Connections

Server Connections are used whenever the Writer needs to exchange information with Typefi Publish Server, unless you are working in an off-line environment (see [Select Project from TSS File](#), p. 170).

Adding a Server Connection

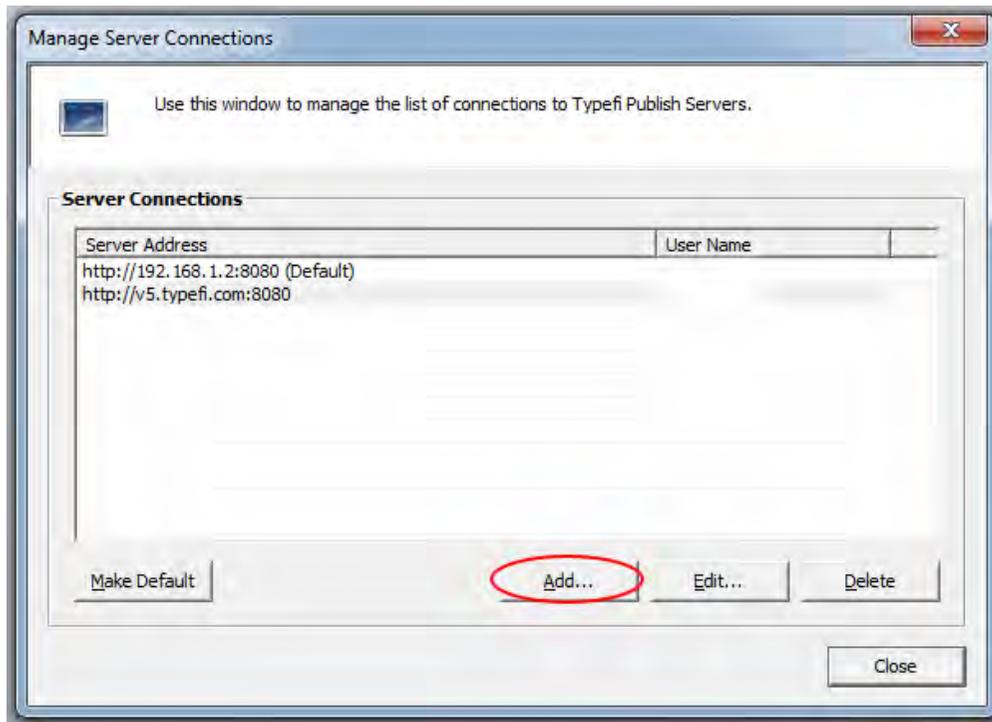
When you want to add a new Server Connection to the Writer:

- Click Manage...



Typefi Writer Settings – General

- Click Add...



Adding another server to the list of available Typefi Publish servers.

- Enter the URL (<http://servername:8080>) for the Server Address, and the username and password used to sign in to the server.
- Enable Remember my password to ensure that the Writer does not prompt you to re-enter your password each time you connect to the Typefi Publish Server.
- Click Test to verify that the Server Connection is working.
- Click OK to add the new Server Connection to the connections list.

DEFAULT CONNECTION

The Default Connection is the preferred connection Typefi Writer uses when you launch Word. With the Remember my password option enabled for the Default Connection, connection to the Typefi Publish Server connection happens without prompts. The current Default Connection shows the word (Default) after the Server Address.

To set the Default Connection:

- Select the connection.
- Click Make Default.
- Once the Server Connections are in place:
- Click Close to return to the Typefi Writer Settings dialog
- Click Close to close the Typefi Writer Settings dialog and finish managing Server Connections.

Editing a Server Connection

You can only edit usernames and passwords after a Server Connection has been added. In cases where the Server Address must be edited, you must delete the Server Connection and add a new Server Connection.

To edit a Server Connection:

- Click Manage...
- Click Edit...
- Make changes to the username or password.
- Click Test to verify that the Server Connection is working.
- Click OK.
- Click Close to return to the Typefi Writer Settings dialog.
- Click Close to close the Typefi Writer Settings dialog and finish editing Server Connections.

Deleting a Server Connection

You can delete Server Connections that become outdated or unused.

To delete a Server Connection:

- Click Manage...
- Click Delete.
- Click Yes to Delete the connection or Click No to retain the connection and return to Manage Server Connections window.
- Click Close to return to the Typefi Writer Settings dialog.
- Click Close to close the Typefi Writer Settings dialog and finish managing Server Connections.

The screenshot shows a dialog box titled "Add Server Connection". The dialog contains a message: "Enter the information required to connect to a Typefi Publish Server." Below this message is a section titled "Server Connection" with three text input fields: "Server address" (containing "http://"), "User name", and "Password". Below these fields is a checkbox labeled "Remember my password" and a "Test" button. At the bottom right are "OK" and "Cancel" buttons.

Connecting to a Typefi Publish Server

Server Timeout

The Server Timeout setting controls the number of seconds that the Writer will attempt to connect to a server before a timeout occurs. For instance, if you are setting up a new server connection and you click the Test button, Writer will attempt to access the server for the specified number of seconds. If the server does not respond in time, a timeout error appears.

To set the maximum number of seconds to wait for a server response:

- Enter the desired number (in seconds) or choose a number from the pop-up menu.

The minimum timeout is 2 seconds, and the maximum timeout is 30 seconds.

Print Output Folder

The Print Output Folder is the folder where the PDF files are saved when you use the Typefi Print command. You can have the folder on your local machine or on a server.

To define the Print Output Folder:

- Click Change...
- Click Browse...
- Navigate to the Folder where you'd like to store the files.
- Select the folder and click Select.
- Click OK.
- Click Close.

The folder location can be dependent on your local computer account settings and network settings. Consult with your Network Administrator in cases where you can't select the desired output folder.

Typefi Style Sheet (.TSS)

The Typefi Style Sheet (TSS) is an XML file that describes properties of a Typefi project. Typefi Writer needs a TSS file to populate its dialog boxes and to make decisions while working with a Typefi project.

In an offline environment where a project cannot be selected from a server, a TSS file can be used as an alternate way of selecting Typefi projects.

The number of seconds listed depends on the Server Timeout setting.

Note: In a normal environment where a connection to a Typefi Publish server is available, TSS files are handled automatically; as projects are selected on a server, Typefi Writer reads information from a corresponding TSS file.

To allow projects to be selected from TSS files:

- Enable Allow projects to be selected from Typefi Style Sheet (.TSS) files.
- Click Close.

View

The View setting controls whether images (supported by Microsoft Word) inserted in Word will be visible.

Document Images

The Document Images setting controls how images are displayed in Typefi Writer documents.

If you have this setting enabled, Typefi Writer will show previews of Typefi images in Word documents if the file name is found and if the file name is compatible with Microsoft Word. If the file name cannot be located, or if the file name is not compatible with Microsoft Word, the Writer will display the file name instead of the image.

If you have this setting disabled, the Writer will only display the file name of each inserted image.

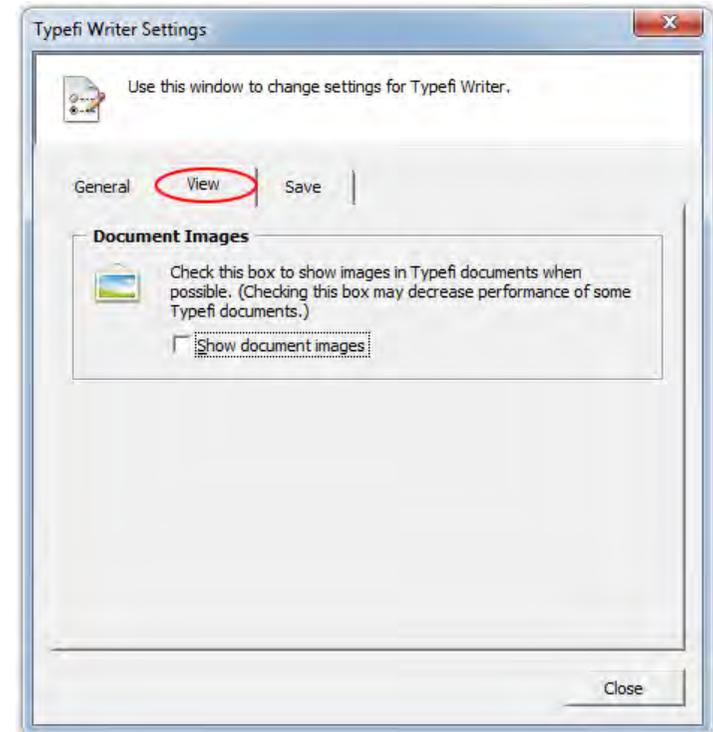
Keep in mind that enabling this option may increase the amount of time it takes to manipulate some Writer documents, so you should keep this option disabled if you want to maximize speed.

To show image previews in Word:

- Add-Ins > Typefi > Settings...
- Click View Tab.
- Enable Show document images.
- Click Close.

To hide image previews in Word:

- Typefi > Settings...
- Click View Tab.
- Disable Show document images.
- Click Close.



Typefi Writer Settings – the choice to view images (but only those supported by Word).

Image file formats

Typefi Writer will only attempt to display images whose file names have one of the following extensions:

- eps, gif, gfa, jpg, jpeg, jfif, jpe, tif, tiff, bmp, dib, rle, bmz, pct, pict, png, emf, wmf.

Though any file name can be specified, it is recommended that you insert only file formats that are supported by Typefi Publish. Typefi Publish uses Adobe InDesign Server as part of its automated publishing solution. Adobe InDesign supports the following additional file formats that are not supported by Microsoft Word:

- Portable Document Format (.pdf):
- Photoshop document (.psd; .pdd)
- Illustrator document (.ai)
- InDesign document (.indd)

And less common formats .ct .trp, .dcs, .pmg and .pcx

Other Media Formats

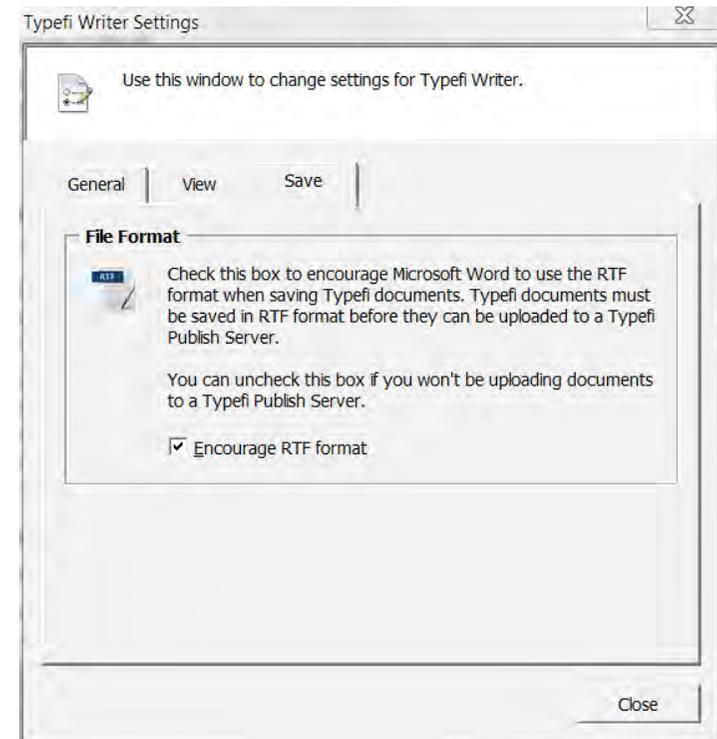
InDesign further adds support for interactive, movie and sound files in the following formats:

- Sound (.aiff; .au; .wav)
- Video (.avi; .mpeg; .mov; .swf)

Although Typefi supports the inclusion of these file-formats with the Typefi Writer, there is no support for further defining interactive options for these media formats.

Save

This new section of the Typefi Writer Settings dialog is provided to avoid the problems associated with using the Word .doc format. As the dialog explains, Word documents that are uploaded to a Typefi server must be RTF (Rich Text Format) for the process to work properly. (Older Word files were converted to RTF automatically, but retained the DOC extension, to avoid worrying those unfamiliar with the format). But it is not necessary if the Word files are remaining where they are. Therefore, the setting only 'encourages' you to use the format.



The new Save settings that makes Word 'encourage' users to save files as RTF – by making it the default format

Preparing Word documents for Typefi

Authoring in Word often starts well before any Typefi markup is added to the Word documents. You will now learn how an author can start preparing a standard Word document for use with Typefi Publish.

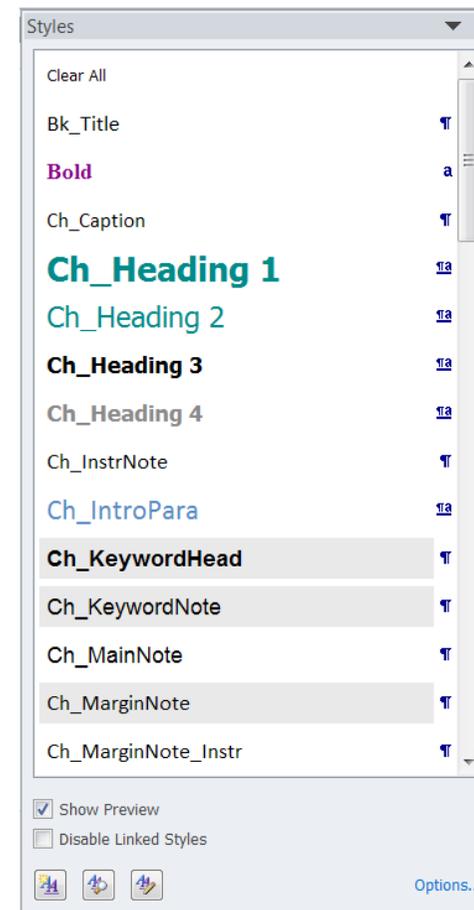
It is common to break long Word documents into 'sections' in order to have different layouts; have different headers and footers; or to allow different column layouts. Typefi Sections serve a similar function...

Sections and Page Breaks

Sections are generally used in Word documents to distinguish unique parts of a publication. Typefi Publish also uses the concept of sections. Where you have inserted Word sections in a document you will probably replace them with a Typefi Writer section. Word Page Breaks are not converted to Typefi Publish, so you should remove them from the document.

Formatting Text

A normal Word document prepared correctly will make use of paragraph and character styles as way of applying consistent and predictable text formatting. If you use styles, then 'mapping' (assigning each style correctly) them to Typefi styles becomes a much easier task. The best practice is to use Word templates that contain identical style names to the Typefi styles in the related InDesign template. Then write the document using just those styles. Doing so means that no conversion for text formatting is required when the document becomes 'Typefied'.



Microsoft Word Paragraph Styles Panel showing some examples of Typefi Paragraph and Character Style Names

Tabs

When you insert tabs to align text in columns, ensure that only one tab character is inserted, and use the Ruler in Word to Define Tab Types and Tab positions. The reason for this is that multiple tabs will transfer through to the InDesign template, and will cause the alignment to be incorrect. It doesn't matter what it looks like in Word!

Special Characters

Typefi Publish has full Unicode character support, which means that all of the Special Characters you insert in Word are fully supported and retained. The one exception is the No-Width Non Break character, which has no support in InDesign.

Symbols

A little care must be taken when inserting symbols (such as icons) as part of your text. There is no guarantee that the font you are using in Word is the same font that is used during page composition in InDesign. If there are a large number of icons you'd like to be able to insert as part of your text, then consider developing a special icons-only font, linked to a character style, that's installed both on your computer and the Typefi Publish Server (or the computer where InDesign Server is installed if it is a different computer) and incorporated in the InDesign template created by the production designer.

Hyperlinks

Word automatically converts e-mail addresses and web-links to hyperlinks. These hyperlinks are retained during Typefi's page-composition process, and can become interactive hyperlinks in a PDF if the specified Job Option uses PDF Settings that retain these hyperlinks. Word hyperlinks to bookmarks or document locations are not maintained during page composition.

Bookmarks

Bookmarks are generally used as a document navigation tool in Word. They can be inserted as empty anchors or around some text that is highlighted. Word bookmarks convert to InDesign bookmarks or PDF Bookmarks during

Note: Tab positions must also be set by the production designer for the selected paragraph styles in the InDesign templates, otherwise the text will not align correctly.

Note: The No-Width Optional Break character becomes the Non-Joiner character in InDesign and will therefore not be round-tripped from InDesign because of its use as a text marker.

page-composition. In addition Word bookmarks can be used by Typefi's Cross-References and Hyperlinks as destinations.

Footnotes

Word footnotes are automatically converted to InDesign footnotes when Word content is published to Typefi Publish. However there are some differences and limitations you should keep in mind.

Footnote Format

Footnote formats you set in Word, such as number format, start at or numbering method are not retained when you publish through Typefi Publish. Instead InDesign is limited to a single footnote numbering style for each document.

Only one Number format, such as "1, 2, 3" or "a,b,c" is supported per document. Although only one numbering format is supported per document, all of Word's numbering formats are supported in InDesign. (In fact, InDesign even adds an additional "*", **, ***" numbering option.) Custom marks are not supported.

Footnote and Endnote Numbering > Continuous setting from Word is not retained - instead InDesign restarts footnote numbering at least for each Typefi Section. Continuous footnote numbering can be support via a small configuration addition where needed. (However, in case of book pagination, the Typefi Designer currently doesn't automatically reset the counter for each document of the book.)

Footnotes and Tables

Native Word footnotes added in tables are ignored during page composition. A good alternate method to use for table-based footnotes is to ask the production designer working on the template for the Typefi project to design a special footnote element that may be used. In Word you would then insert a footnote marker such as an asterisk, and an element in which you would enter the footnote text.

Endnotes

Word Endnotes are handled as if they are Word Footnotes when you publish a Word document to Typefi Publish and therefore encounter similar exceptions or limitations. Where both Endnotes and Footnotes are used in a document, the Endnotes will be merged within the Footnotes and numbered sequentially according to the InDesign Document Footnote Option settings.

Where footnotes and endnotes must co-exist, consider using a third party application to generate Endnotes as literal text in the word document, for instance Thomson Reuter's EndNote: <http://www.endnote.com>

Index

An index generated by Word is ignored by Typefi Publish. Typefi can add configuration components that will build an index during page composition where required. Please contact your local account manager or Typefi contact for more information.

Cross-References

Word's native cross-references are ignored by Typefi Publish, although bookmarks to which cross-references refer are retained during the process.

It is advised that you use the Typefi Writer Cross-References command instead of Word's native Cross-References.

Tables

Your Word tables can be converted to Typefi tables. Depending on the table designs created by the production designer, some paragraph style formatting and proportional distribution of columns might need to be applied to tables to get the best-looking result when the Word document is put through the Typefi process.

Images

Word drawings, clip-art, charts, pictures etc. do not convert to Typefi Publish. You should create graphics and illustrations outside Word, and save them in a file format that is supported by Typefi Publish (see also [Image file formats](#), p. 163) and

insert them either as a Typefi Inline Image (see [Insert Image](#), p. 205), or part of a Typefi Element. (See [Typefi Elements](#) in the Typefi Designer User Guide).

The same applies to pictures such as digital camera images, or images selected from Word's Clip Art pane, or other locations on your workstation or server.

Track Changes

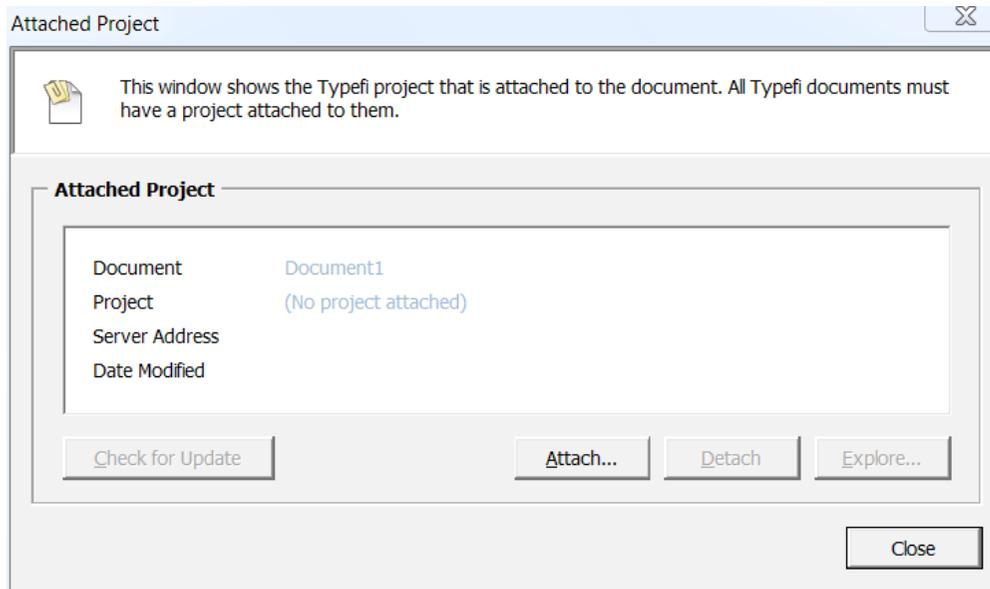
Word's 'Track Changes' feature is supported by Typefi Publish. Inserted or deleted content is marked-up with a Typefi Condition (see [Insert Condition](#), p. 202) such as 'Deleted' or 'Added'. When a Word document with tracked changes enabled is published through Typefi, the default publishing behaviour is to 'accept all changes' during the publishing process. However, the Word document and its tracked changes remain unaltered, and different publishing behaviour can be configured. For instance you might want to publish two different versions, one that shows the document as Final, and one that shows all the inserted text in green, and removed text in red strikethrough.

Linking Word Documents to Typefi Projects

In order to mark up your Word document through the Typefi Writer, the project must be linked to a Typefi project.

You can associate your Word documents with a Typefi project in two different ways:

- through project attachment
- through the use of a Typefi Stylesheet File (.tss).



'Attached Project' dialog – a document with no project attached.

Attaching a Typefi project

In order to attach a project to an existing Word document, you must have access to the Typefi Publish Server from your workstation and be a member of the project (see [Starting a Project](#) in the Typefi Server User Guide).

To attach a Typefi project to a non-Typefi Word document:

- Open the Document in Word.
- Choose Typefi > Attached Project... or click the 'Attached Project' icon in the Typefi toolbar.

The Attached Project dialog appears.

- Click Attach...

A list of all the Typefi projects to which you have access appears.

- Select the appropriate project and click OK.

The Attached Project dialog reappears, this time displaying the Name, Server Address and Date that the project was last modified on the Typefi Publish Server.

- Click Close to associate the Word document with the Attached Project.

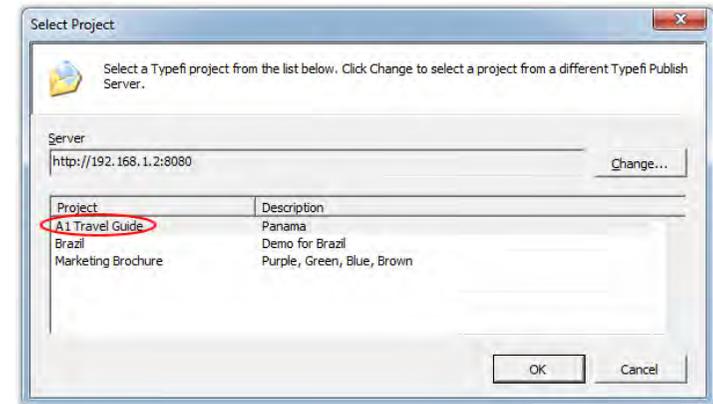
Once a Typefi project is attached to the Word document you can use the Typefi menu to markup the Word document by inserting Typefi objects, such as Sections and Elements, and format the text using Typefi Paragraph and Character Styles. When the markup is completed you can publish the document through Typefi Publish.

Select Project from TSS File

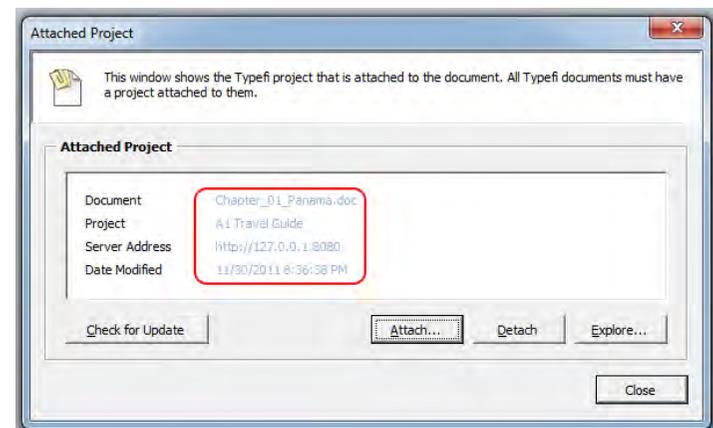
Another method you can use for associating an existing Word document with a Typefi project is through linking the document to a .tss file. One thing to remember is that although you will be able to markup the Word document for use with Typefi Publish, you will not be able to publish the document until you're connected to the Typefi Publish Server.

In order for a Word document to be associated with a project through its .tss file, the Typefi Writer Settings must first have the Allow projects to be selected from Typefi Style Sheet (.TSS) file option enabled (see [Typefi Style Sheet \(.TSS\)](#), p. 161).

To select a project from a TSS file:



Select Project.



Attached Project dialog showing the name and location of the project attached to the document. (They are dimmed to indicate they cannot be manually altered).

- Open the Document in Word.
- Choose Typefi > Attached Project... or click the Attached Project icon in the Typefi toolbar.

The Attached Project dialog appears.

- Click Attach...
- Click Typefi Style Sheet (.TSS).
- Click Browse... and
- Navigate to a .tss file on your system.
- Select File.
- Click Select.
- Click OK.
- Click Close.

Alternatively:

- Choose previously accessed .tss from the drop down list.
- Click OK.
- Click Close.

The .TSS files drop down list stores each .tss file path that is accessed. To clear the list of .tss file paths from this drop down:

- Choose Clear List.

New Typefi Document

You can create new and empty Typefi documents in two different ways. They can be created from within Word, or they can be created directly on the Typefi Publish Server.

New Document from Word

When the Typefi Writer is added to Word, the Typefi menu and toolbar contain a 'New Document' option.

To create a new Typefi document from Word:

- Choose Typefi > New Document... or click the New Document icon in the toolbar.

A dialog prompts you to select a project from Typefi Publish Server. This is how you proceed:

Typefi Server

A list of Projects available on the selected server appears.

- Select a Project from the Project List.

Note: To change the Server selection, click *Change...* and from the Server Selection list choose another Server then click *OK* to return to the Select Project dialog

The 'Include content from' drop-down at the bottom of the dialog gives you the option to create a new document that is an exact copy of an existing document that is part of the selected Typefi project.

New document based on other document

If you want to start your new document from another Typefi document that is part of the selected project, select the preferred .doc or .rtf file from the Include content from drop-down.

- Next click *OK*.

If you've opted not to base your new document on an existing document, the Select Typefi Section dialog will appear, asking you to choose the first Typefi Section to insert in your Word document (see [Typefi Sections](#), p. 69).

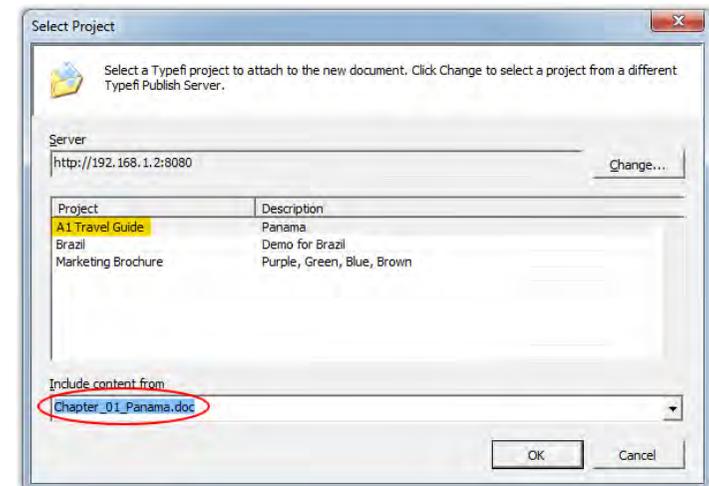
To choose the first Typefi Section of your document:

- Choose a Section from the list.
- Click *OK* to insert this selected Section as the first in the document and follow the Section Properties prompt, then click *OK* to return to the Word document or Click *Cancel* to return to an empty Word document.

The Word document has now been linked to a Typefi project.

New Document from Server

Another way in which a new document can be created is from the Typefi Server. You'll need to be authorized to have 'Browser access' to the Typefi Publish Server in order to use this feature (see [Starting a Project](#) in the Typefi Publish Server Guide).



Selecting a Project from a server, with 'Include content from' option enabled.

To create a new document on the server:

- Connect to Typefi Publish Server from your web browser.

After you've signed into the server:

- Click the Project within which you'd like to create a new document.
- Click Content.
- Click New...
- Enter the document name. You don't need to add the .doc extension; Typefi will do that for you.
- Set the Options.
- Click Create.

A new Word document has now been created in the content repository on the Typefi Server. To edit the document in Word with Typefi Writer, you must 'check out' the document (see [Check out](#) in the Typefi Publish Server Guide).

Create Document Options

The document options are only needed when you plan to create a new document based on existing data that was extracted to the Sections repository from other documents in the project. (This may be very useful to create a composite document from a number of Word files, rather than making a whole new Word file.)

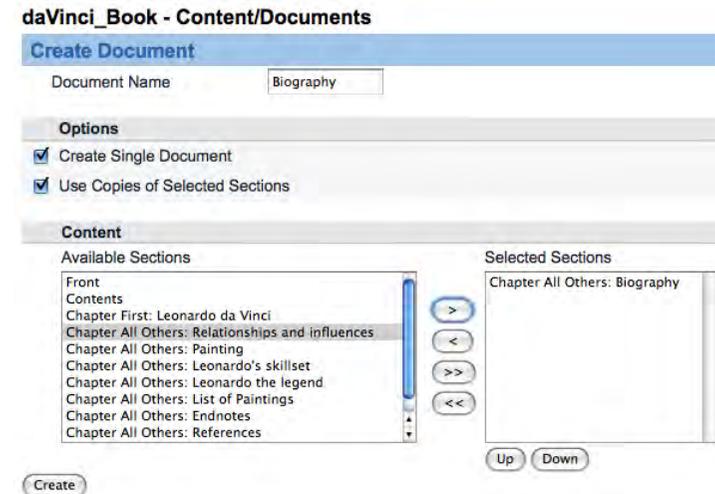
Selecting Sections

Available Sections list all the sections that are extracted from Word documents (or added from a XML repository) to a Typefi project Content/Sections repository on the Typefi Publish Server.. Available Sections may be used as a source for data when publishing jobs directly from the Typefi Publish Server.)

To include sections in the Word document you are creating from the available extracted sections:

- Select the sections from the 'Available Sections' list, then click , to add them to the 'Selected Sections' list. To Add All Sections from 'Available Sections' to 'Selected Sections', click .

To exclude sections from the Selected Sections list:



Creating a New Typefi Document within the Typefi Server Project.

- Select the section name to be removed, then click . The removed section is moved back to the 'Available Sections' list. To Remove All Sections from 'Selected Sections', click . All sections are now listed under 'Available Sections'.

Next you must choose whether you're going to create a single Word document, and whether you want to use copies of the current sections, or use the original section data as part of the Word document(s) you are creating.

Single document

Choose Single Document, to create a single Word document that contains zero or more selected sections.

When you disable the Single Document option and have selected two or more sections, Typefi will create a Word document for each of the selected sections, using the Document Name as a prefix for the document names and the Section Names for the rest of the document names.

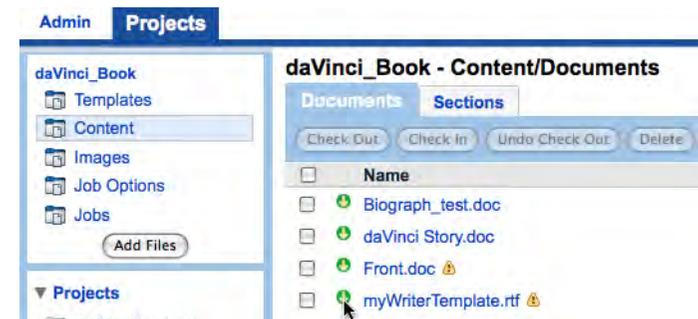
Use Copies of Selected Sections

The Use Copies of Selected Sections when enabled will create a new Word document based on copies of the available sections. You then check out the created document and later on check it back in after making changes to the document. When you check in the document and click 'Update Sections', new sections will be added to the Content/Sections repository.

Disabling the Use Copies of Selected Sections means that when you check in changes to the document and click Update Sections, existing sections will be updated.

Writer Theme

With the creation of a Writer Theme file you can control the default look of Word documents created from the Typefi Publish Server. By default, when you create a New Document on the Typefi Publish Server from source Section XML you might have noticed that the newly created Word documents contain little to no formatting. Headings won't appear in bold or in a larger font and you can't tell when a character style is applied, as there is no visual cue that shows you something is bold or italic. With a little effort you can actually change this.



myWriterTemplate.rtf added to Content/Documents as Writer theme.

What's needed is a slight configuration change on the Typefi Publish Server that must be done by your server administrator. Secondly, a Rich Text Format (.rtf) Word theme file must be created that contains all of your preferred formatting. For different Typefi projects, there can be formatting differences. However the file name must always be the same.

A sample file called `WriterTemplate.rtf` that includes the core Typefi styles for Sections, Elements, Tables etc. has been added to the `Server/context/conf` directory. It's recommended you use this one as a starting point.

To create a `WriterTemplate.rtf` file:

- Create a copy of the sample `WriterTemplate.rtf` file (`Server/context/conf`) and save it somewhere (such as the Desktop).
- Sign-in to the Typefi Publish Server and choose the project to which you'd like to add the file.
- Click Add Files, then (when prompted by the FileManager) browse to the file and add it.

The file is uploaded to `Content/Documents`.

- Check out the file and attach it to the project.
- Next you'll be able to insert all of the paragraph and character styles, and then use Word's Styles and Formatting panel to modify the look and feel of the styles (only necessary if it helps).
- When done, save and close the file and check it back in.

For this file to behave as a theme that is applied to newly created Word documents, the server must be reconfigured slightly:

- Contact your server administrator and inform the administrator of the file-name (e.g. `myWriterTemplate.rtf`).

The administrator can then make the required changes to the server configuration, so that Typefi Publish knows that if a file of that particular file name exists in a project it must be used as a theme that formats the Word document as it is created.

Administrator task: Edit the `Server/context/conf/static.properties` file on the Typefi Publish Server and define the .rtf file name provided as the `cxml2rtf.template` setting. The server must be restarted for the changes to take effect.

Check for Updates

The Check for Updates command is used to resynchronise a Word document with its Typefi project and update all Typefi Writer settings available to the author in Word. A Word document can become outdated – for instance, when the production designer makes amendments to the InDesign template that is part of a Typefi project.

When a paragraph style name is changed or a new paragraph style is added to the template while you're working on the Word document, the changes will not be reflected in your document until you've resynchronised the document with the project.

To check whether any updates are available:

- Choose Typefi > Attached Project or click the Attached Project icon in the Typefi toolbar.
- Click Check for Update...

If there is an update available the Writer prompts you with a message stating the date and time that the last version of the project was created. It then gives you an option to attach the newer version of the project to your Word document.

- Click Yes to attach the new version, click No to leave the Word document unchanged.
- If there are no updates available a message window appears stating "No update is available", and you can click OK to return to the Word document.

Detach Project

There might be a need to permanently remove the link between a Word document and a Typefi project. For instance, the Word document might need to be resubmitted to an author so that a start can be made with the authoring of a next edition for a publication. If the author doesn't have Typefi Writer installed in his copy of Word, there is no need to have this attachment.

To detach a project from a Word document:

- Check out the Word document from the Typefi Publish Server, or open the Word document if stored external to the Typefi Server.
- Choose Typefi > Attached Project, or click the Attached Project icon in the Typefi toolbar.

The Attached Project dialog appears.

- Click Detach.

A message appears asking you if you're sure you want to detach the project from the active Word document.

- Click Yes to detach the project, or click No, to leave things as they were and return to Word.

Converting Typefi 4.0 documents to Typefi 5.0

Typefi Writer 5.0 has been fully re-engineered and quite a few things are structured differently, requiring that any earlier Typefi Writer documents are updated in order for them to be published through Typefi Publish 5.0. The conversion to Typefi Publish 5.x takes place automatically.

To convert a Typefi 4.x document to Typefi 5.x:

- Check out or open the Word document that is associated with a Typefi project.

The document is automatically converted as indicated by the message window that appears.

- Click OK, to continue working in the updated document.

If you don't want to update the document, simply don't save the Word document when you close it.

The Typefi > Refresh Document command also removes any old Typefi 4.x markup it finds in a document and updates or deletes any obsolete markup (see [Refresh Document](#), p. 219).



Document updated to work with newer version of Typefi Publish System

Sections

Every Typefi Publication is made up of one or more sections. Similar to Word, Typefi Sections are used to create distinct parts within a publication that contains an unbroken flow of content. Individual Sections may also have a different layout or page numbering format.

The first Typefi component that you must insert in a Word document is a Typefi Section. This is also the reason you're prompted to insert a section when creating a new document (see [New Document from Word](#), p. 171). Typefi uses the sections to determine what the page designs and numbering format must be used when pages are being designed and populated with the content you're writing in Word.

Insert Section

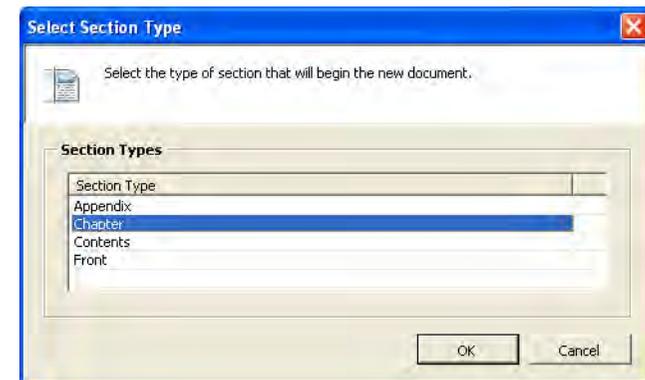
To mark each new major segment of a document, you insert a new section. Sections can exist for many different publication segments. For instance: a Chapter, a Prelim, an Appendix, but also a two-page flyer; a four-page flyer with different front and back design; etc. Depending on the project you're working on you're likely to encounter different sections.

To insert a section:

- Choose Typefi > Insert Section or click the Insert Section icon in the Typefi toolbar.

The Select Section Type dialog appears.

- Choose the Section Type.
- Click OK.



Choice of Section Type.

The Typefi Section is now inserted at the cursor position location in the Word document.

For Sections that make reference to Section Fields, or documents that contain Conditions (see [Typefi Sections](#), p. 69) the Section Properties dialog appears after clicking OK. The dialog prompts you for additional data before the section is added to the document.

Typefi Field data entered at section level is unique to the section. The data entered will populate the field placeholders the production designer has inserted in the InDesign template that is used during automated page-composition.

In the Section Properties dialog:

- Enter any of the required field data, such as the ChapterTitle in the example above.
- If the project you're working on contains conditions, you also have the option to conditionalize the entire section, by selecting the relevant condition from the Conditions list.
- Click OK.

Your Word document will now include a Section. Continue to insert the rest of the content for this segment of your publication immediately following the Section marker.

Edit Section

You can edit the Section Type, Field data and Condition settings after insertion:

Change Section Type

To change the Section Type:

- Double click the Section marker in the Word document. This displays the Edit Section dialog.
- Click Change.
- Choose a new Section Type.
- Click OK.
- Edit any Fields or Conditions settings if required.
- Click OK.



ChapterTitle added (left) and Condition selected for entire Section (right).

```
SECTION:·Chapter¶  
ChapterNumber:·(AutoNumber)¶  
ChapterTitle:·Biography¶  
Conditions:·Teacher¶
```

Typefi Section added to the Word document with Typefi Writer.

The Section Type in the Word document has now been amended.

Edit Section Fields

To edit a Section Field:

- Double Click the Section Field label preceding the field data, for example 'ChapterTitle'.
- The Edit Section dialog appears.
- Change the field data.
- Click OK.

Edit Condition

To edit a condition:

- Double Click "Conditions:" in the Section marker.

The Edit Section dialog appears.

- Change the Condition settings.
- Click OK.

Edit Section with Typefi Document Explorer

The Typefi Document Explorer (see [Typefi Document Explorer](#), p. 220) can also be used as a tool for editing Typefi Sections. Especially when you need to edit multiple sections and don't wish to endlessly scroll through your document looking for them, the Document Explorer is a great time-saver.

To edit sections with Typefi Document Explorer:

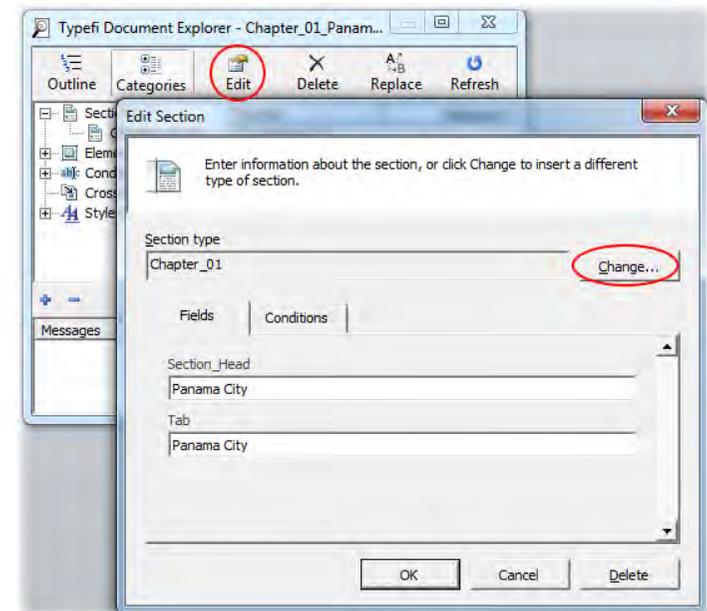
- (Optional) Click a particular section component.
- Choose Typefi >Explore Document... or click the Explore Document icon in the Typefi toolbar.

In the structure tree, the selected section component is automatically highlighted. If this isn't the right component, click the section component you want to edit.

- Click Edit.

The Edit Sections dialog appears.

- Make the changes.



Typefi Document Explorer allows quick access to, and editing of sections.

- Click OK to return back to the Typefi Document Explorer.

As long as the Explorer window is open, you can continue to navigate through the structure tree and edit other sections.

- When you've finished editing click Close to return to the Word document.

Delete Section

When you delete a Section from a document, it only deletes the Section marker and its field information from the document. The content that was part of the Section will remain and become part of the previous Typefi Section.

To delete a Section from your document:

- Double click the Section marker in the Word document. The Edit Section dialog appears.
- Click Delete. The Delete Section message appears.
- Click Yes to delete the Section or click No to return to the Edit Section dialog.
- Click OK to return to the Word document.

Alternatively:

- Locate the Section in the Typefi Document Explorer.
- Click Delete. The Delete Section message appears.
- Click Yes to delete the Section or click No to return to the Document Explorer.
- Click Close to return to Word.

The Section marker has now been removed from the document.

Converting Word section breaks to Typefi Sections

You should remove Word section breaks from the Typefi Writer document and replace them with Typefi Sections where suitable.

Formatting Text

Word has many layout and design features, but you will mostly use Word to author or edit text. Styles for paragraphs, characters, tables and lists in Word enable you to apply accurate and consistent text formatting.

Typefi distinguishes three different text based styles. Paragraph, Character and Table Styles. Table styles we'll discuss in a separate chapter (see [Tables](#), p. 187). List styles, such as bulleted and numbered lists, are incorporated in Typefi's Paragraph Styles. In contrast to Word, which adds some 150 styles to the Normal.dot template, Typefi will only display those styles provided by the production designer for use.

Paragraph Styles

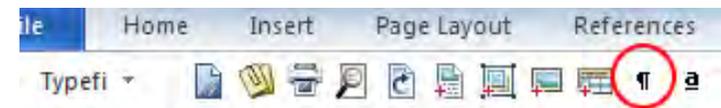
Paragraph Styles are used to apply text formatting to entire paragraphs. You're probably used to using Paragraph Styles through the Styles and Formatting pane in Word, or else the Style menu in the Styles and Formatting toolbar.

Typefi Paragraph Styles do not appear in the Styles and Formatting pane until they have been used at least once in the document. (However, they can all appear in the Styles and Formatting list when the Word document was created from existing Typefi content, or has had a Writer or Word Theme applied to it.)

Applying Typefi Paragraph Styles

To apply a paragraph style to text in Word:

- Place the cursor within a paragraph, or highlight the entire paragraph.
- Choose Typefi > Paragraph Styles... or click the Paragraph Styles icon in the Typefi toolbar.



The Typefi Toolbar: Typefi Paragraph Styles icon

- Click the Style Name.
- Click Apply.

Bulleted and Numbered Lists

As we mentioned at the start of this chapter, Word List Styles are absorbed into Typefi Paragraph Styles. So how do these work?

- The production designer must define unique Paragraph Styles in the InDesign template that forms the basis for the page composition. The numbering, bullet symbol and hanging indentation settings are all included within these styles.
- Instead of using a normal paragraph style and then applying the list attribute in Word when authoring/editing text, you must apply the appropriate paragraph style.
- To properly have these list styles recorded in the XML that is extracted behind the scenes when publishing content from Word, you must ensure that the formatting of the styles in Word contains Bullets or Numbering.

Multiple paragraphs within list item

Typefi does not support use of multiple paragraphs within a single list item. Instead you can simulate it by inserting a forced line break (Shift+Enter) where you'd like to see a paragraph inserted within a list item.

List Levels

In Word you create different levels for numbered and bulleted lists by using the Increase Indent button. This does not work in a Typefi document...

You must inform the production designer of the levels of numbers and bullets that will be needed, so that the InDesign template provides the necessary paragraph styles to meet your needs.

Restart numbering

The numbering of lists is controlled by the paragraph styles in the InDesign template. For instance, a Level 2 paragraph style might have a setting included by the production designer that resets the numbers for this style after each higher level. (For example 1-a-b-2-a-b.) Using the restart numbering option in Word has no effect on numbering during page-composition in InDesign. Again, the production designer must be made aware of your document numbering needs.

Nesting of lists

Nesting of lists may result in incorrect numbering as the numbering is controlled by the paragraph styles in InDesign. Multiple nesting of lists is quite possible through correct application of Paragraph Styles provided by the production designer.

Character Styles

Character Styles apply text formatting to selected text within paragraphs. In contrast to Paragraph Styles, they are not used for the text formatting of entire paragraphs, but merely to make certain characters, words, phrases or sentences stand out. For example, there might be words or phrases that need to appear in bold or italic.

Applying Typefi Character Styles

To apply a character style to text in Word:

- Within a paragraph that already has a Paragraph Style applied to it, highlight some text.
- Choose Typefi > Character Styles... or click the Character Styles icon in the Typefi toolbar.
- Click the Style Name.
- Click Apply.



The Typefi Toolbar: Typefi Character Styles icon

Word's Repeat Style Command

Once Typefi Paragraph or Character Styles have been added to the Word Styles and Formatting menu, you can use Word's Edit > Repeat Style command to reapply the last applied style elsewhere in your document. (Keyboard Shortcuts F4 or Ctrl+Y or Alt+Enter will also work again at that stage.)

Soft Styles

Manual (or 'soft' – as opposed to 'hard' styles) formatting applied at character level in Word (such as Bold, Italic or Underline) can be passed through to Typefi Publish. However, the project settings in Typefi Server may filter out any of the supported soft-styles.

The soft-style formatting is only passed to the Typefi Publish engine if this feature is enabled as part of the Job Option against which content is published.

You should communicate with the person responsible for Job Option definition and InDesign template design regarding support for soft-styles, prior to using them.

The following soft-styles are supported:

Bold, Italic, Underline, Outline, Strikethrough, Superscript, Subscript, All Caps and Small Caps

Converting Word Styles to Typefi Styles

There are easy ways to convert Word Paragraph Styles or Character Styles to Typefi Styles.

Let's take a look and see how through a simple example we can replace all text that has "Heading 1" applied to it with a Typefi Paragraph Style called "Heading1" (no space).

In your document and with your project, just replace these style names with relevant style names.

- Ensure the Format > Styles and Formatting pane is displayed.
- Locate the First "Heading 1" paragraph in the document and insert your cursor within the paragraph.
- Choose Typefi >Paragraph Styles or click the Paragraph Styles icon in the Typefi toolbar.

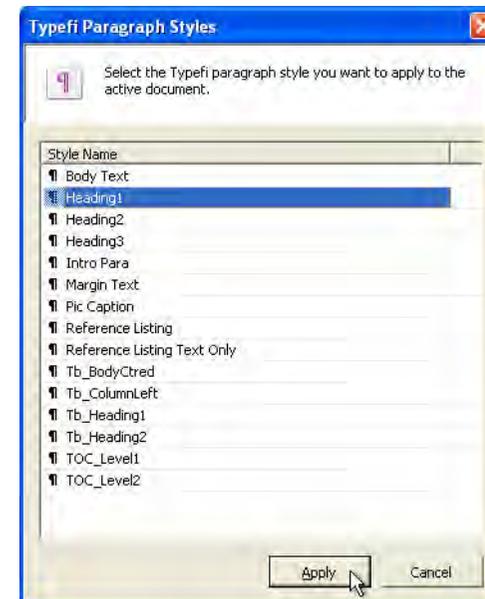
The Typefi Paragraph Styles dialog appears.

- Click the Style you want to replace 'Heading 1' with.
- Click Apply.

The new style is added to the Word's Styles panel (and may be chosen from there in future).

Next you can replace all the other occurrences of 'Heading 1' (old style) with 'Heading1' (new style).

- Place your cursor within a paragraph that has the 'old' style applied to it occurrence of the style you want to replace (such as Heading 1 in the example).



Typefi Paragraph Styles being applied.

- In Styles and Formatting click the drop-down and choose Select All 'n' Instances. (there may be hundreds!)
- All of the text within the word document that has this style applied to it is now selected (a clever Word trick!).
- Click the new paragraph style name in the Styles list ("Heading1" in the example here) and all text formatted with the old style is now formatted with the new style.

Converting Soft-Styles to Typefi Character Styles

Word soft-styles are easily recognizable in the Styles panel, when all of the Typefi Paragraph styles have been applied. They appear as a style override, listing the paragraph style name followed by a plus (+) symbol and the soft-style name (if the Styles Options is set to show Font Formatting).

To select all soft-style instances for a particular paragraph style and apply a Typefi Character Style to them:

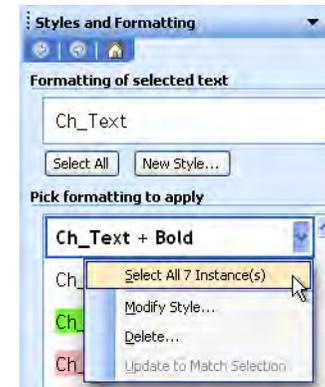
- First check that the Typefi Character Style is listed in the Word Styles and Formatting pane. If the style isn't available, then apply it to some text in the document to add it.
- Next for each of the Styles containing soft-style overrides, locate the style override in the list.
- Click the drop-down arrow and choose Select All 'n' Instances.

All of the text formatting with the soft-style is now selected.

- Click the Typefi Character Style name from the Pick formatting to apply list in the Styles and Formatting pane.



Selecting all instances of text that have a particular style applied.



Paragraph Style with soft-style override showing as '+ Bold'.

Tables

Tables format text inside a grid of columns and rows. When using Typefi Publish, table designs are controlled by the production designer who prepares the InDesign templates that are used during automated page-composition.

Cell coloring applied to tables in Word is ignored by Typefi Publish and for certain table styles even paragraph style formatting may be ignored. In order to understand which level of table formatting must be applied within Word, it's advised that you consult with the production artist responsible for developing the Table Styles in the Typefi template being used by the project.

Insert New Table

Let's first look at an insertion and formatting of a newly created Typefi Table.

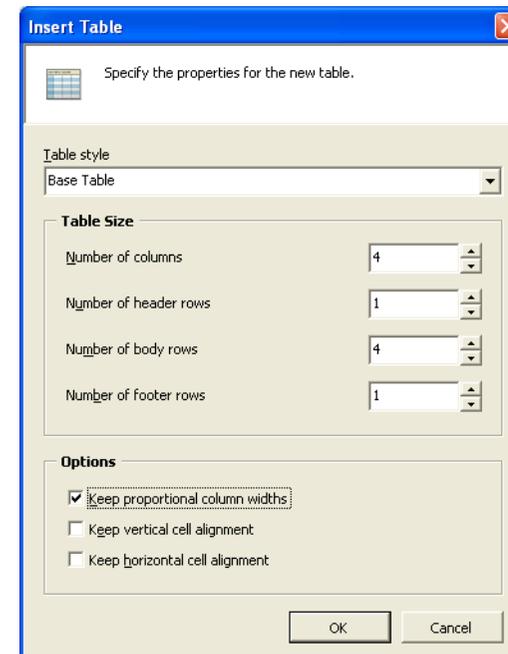
To insert a new table:

- Choose Typefi > Insert Table.

The Insert Table dialog appears asking you to set all of the properties for the new table. These will be explained in more detail later.

- Set all Table Size specifications.
- Set additional Options.
- Click OK.

A new table has now been created with a brown-shaded Typefi markup above:



Insert Table dialog

TABLE: Base Table			

Newly created Typefi Table

Table Size

The Table Size settings in the Insert Table dialog control the number of rows and columns the table will have as well as the number of header and footer rows.

Header Rows

Header Rows are the top one or more rows of a table. Generally they stand out in a design through use of thicker lines, different background color, or text formatting. The data you enter in any header row will repeat when a table covers more than one page. In some cases, depending on the template design created by the layout designer, you might even see the header row repeating itself across columns. This repeating behaviour is only seen upon completion of page composition. Word itself will not repeat the header rows when your table exceeds the page length in Word.

Footer Rows

Footer Rows are similar to Header Rows, but are positioned at the bottom of a table. (Perhaps there needs to be a special 'totals' row in a financial table or a table notes row.) Like Header Rows, Footer Rows will repeat themselves across pages when tables continue on next pages during page-composition.

Options

The Options settings enable the author to override some of the table formatting otherwise controlled by the table style designs set up by the production designer in InDesign. This is not necessary unless the formatting in the final job output is

unacceptable. The usual Option chosen is 'Keep proportional column widths', since the column content is so variable.

Keep proportional column widths

To override any column width settings captured in the Table Style by the production designer, start by applying your own proportional distribution of table columns in Word, using Word's native column editing tools.

To maintain the proportional column distribution you've set in Word:

- Select the Keep proportional column width setting in the Typefi Table dialog.

Keep vertical cell alignment

The Keep vertical cell alignment is used when you want to control the vertical alignment of data within its table cells from Word. Enabling this setting will override any vertical alignment settings defined as part of the Table Style itself.

To maintain the vertical cell alignments you've set in Word:

- Select Keep vertical cell alignment in the Typefi Table dialog.

Keep horizontal cell alignment

The Keep horizontal cell alignment settings allows you to change the alignment settings of text in a table cell and retain this alignment change even if it is an override for a paragraph style alignment.

To maintain the horizontal cell alignment you've set in Word:

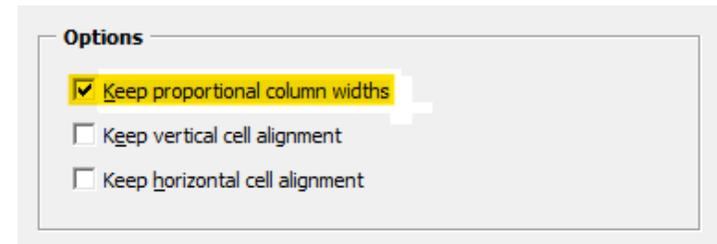
- Select Keep horizontal cell alignment in the Typefi Table dialog.

Word's Table Properties and Typefi Tables

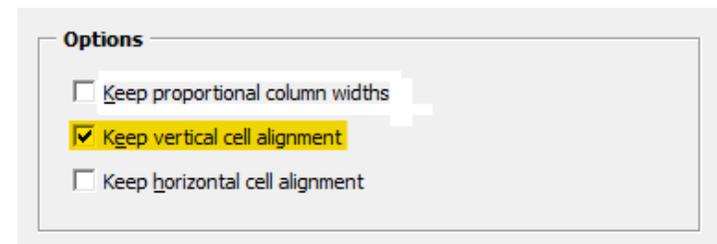
Once you've inserted a Typefi Table in a Word document, you can use some of Word's table editing features to set table attributes.

Paragraph Styles

Typefi Table styles can have the first paragraph style defined as part of a table style. That means that no matter what formatting you apply to the first paragraph in a table cell, the formatting set by the production designer in the InDesign template will override your formatting.



Choosing to retain the set column widths when converting to Typefi table.



You may want to keep cell contents vertically aligned the way they were in Word.

However additional paragraphs must have their formatting set in Word. In addition it could be that the table design isn't suited to locking in this first paragraph style setting. In this case you'll have to ensure that you apply appropriate paragraph and character style formatting to the data retained in your table.

Cell Merging

Cell Merging is not controlled by Typefi Table styles. This means that any cell merging (for instance in header rows or column cells) must be set in Word. Use Word's Tables > Merge Cells command to merge cells.

Table Properties

Some of the settings you can apply to a table through Word's native Table > Table Properties dialog are ignored during page composition.

Cell Alignment settings are retained only if the Keep vertical cell alignment option is enabled in the Typefi Table set-up, however, cell inset settings are not retained.

So what are some of the settings that have no effect? Setting Preferred width has no effect on the eventual table width, as the width setting is defined as part of the Typefi Table style. Word's Positioning and Alignment settings are not used.

Typefi Tables are inline with text, meaning the tables will always sit in a paragraph of their own, and their alignment and overall width settings are controlled by the production designer who designed the InDesign template. Table Break points set in Word are also ignored.

The fact that none of these settings comes across doesn't necessarily mean there is no use for them in Word. For example in cases where you've enabled the Keep proportional column widths setting in the Typefi Table dialog, and have a series of tables in Word that require the same amount of columns and column distribution, you might want to define exact table width or column width settings, to ensure that each table appears identically during page composition.

Edit Table

Tables can be edited after they've been created.

You should be careful not to merge cells of a header row with cells of a body row (or even footer row), or to merge cells of a footer row with cells of a body row. While Typefi Publish hopefully will handle the case with just some warnings, neither the XML representation for tables nor InDesign support the merging of cells of different areas of a table (i.e. header row area, body row area and footer row area).

To edit the number of columns or rows a table has, use Word's table formatting tools. Also column distribution, width, merged cells settings are all controlled through use of Word's native table formatting tools.

To edit any of the Typefi specific table settings:

- Double click the Typefi Table header or locate the Table in the Typefi Document Explorer.
- Click Edit.

The Edit Table dialog appears. With exception of the number of body columns and rows any of the Typefi Table settings can be altered.

- Make the required changes for Table Settings and Options.
- Click OK (and Close if editing via the Document Explorer).

Delete Table

When deleting a Typefi Table from Word, a core Word table including table data stays behind in Word.

To delete a table:

- Double click the Typefi Table header or locate the Table in the Typefi Document Explorer.
- Click Delete and Close if editing via the Document Explorer).

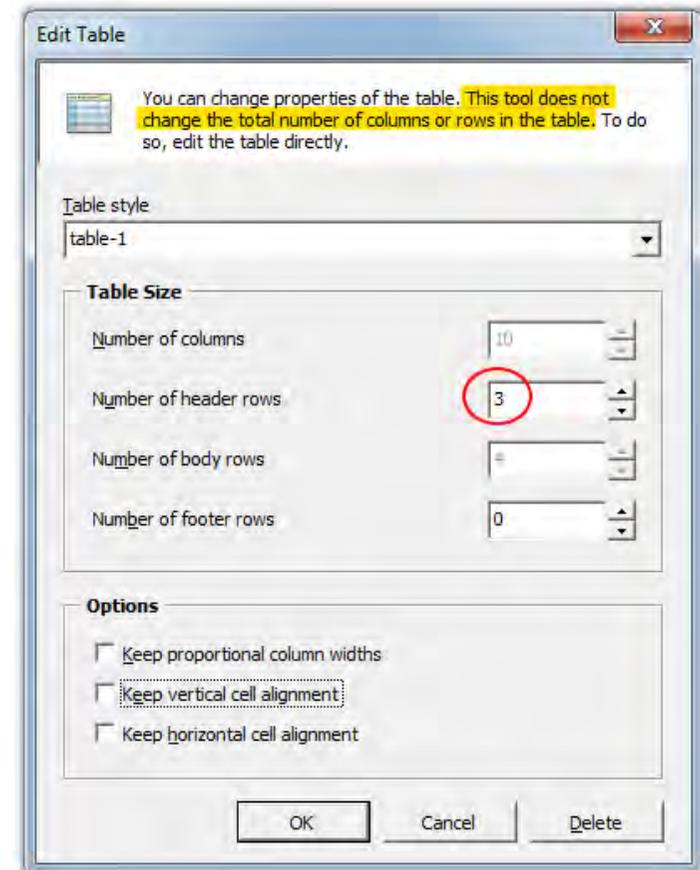
Applying a Typefi Table Style to a standard Word table

Word tables don't have to be deleted or recreated in order to turn them into Typefi Tables, because you can turn them into Typefi Tables.

To convert a Word table to a Typefi Table:

- Place your cursor at the end of the paragraph preceding the table.
- Tip: Show hidden characters in word, to verify the cursor is placed before the paragraph return.
- Choose Typefi > Insert Table.

The Insert Table dialog appears.



You may edit a Typefi table's settings after inserting it, but not the number of columns or rows. Do that the usual way.

- For the Table Size specifications merely set the number of Header or Footer Rows. You don't need to set the number of body columns or rows, since Typefi will do that automatically.
- Set additional Options.
- Click OK.

A new Typefi Table is now inserted preceding the Word table.

- Place your cursor in the first cell of the Typefi table.
- Click and drag down and select all of the table rows as well as the blank paragraph the Typefi Table inserted above the Word table.
- Press Delete.

You have now linked the Word table to a Typefi Table style. To check that the column and row settings have been amended properly edit the Table and check the Table Size settings.

Hyperlinks

You add Hyperlinks to documents for navigational purposes. You can include them in Cross-References or set them as individual navigational links.

Hyperlinks consist of two components: text to display and a target. The hyperlink text to display is the content that is displayed in the Word document and the target is the 'address' to which the hyperlink points when it is clicked in an interactive PDF.

Insert Hyperlink

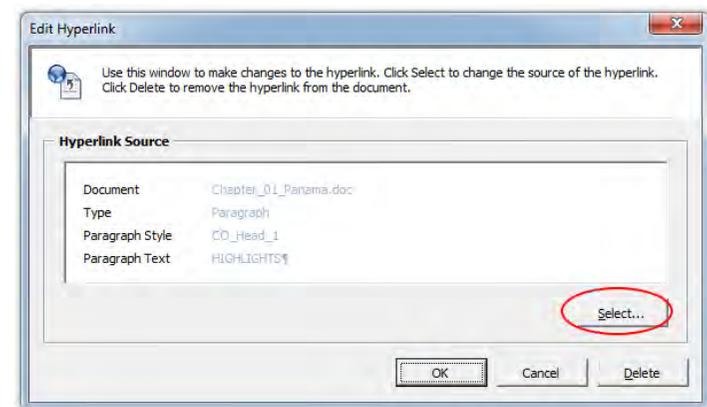
Word web and email hyperlinks are automatically converted during page composition. However, you must re-create other Word hyperlink types (such as links to bookmarks or paragraph styles as targets) as Typefi Hyperlinks.

To insert a new hyperlink:

- Highlight the content that is to be the source of the hyperlink.
- Choose Typefi > Insert Hyperlink or click the Insert Hyperlink icon in the Typefi toolbar. The Insert Hyperlink dialog appears.
- Click Select.... The Select Hyperlink Source dialog is displayed.
- Choose the document to which you'd like the Hyperlink to go.

By default the Active Document is selected. However, if you check out other documents that are part of the same Typefi project, you may choose that. When publishing a job containing inter-document hyperlinks, you must publish content from the Typefi Publish Server. During the page-composition the hyperlink will then be resolved.

- Next click either Bookmarks, Paragraphs or Section Fields.



Choose a source for a Hyperlink by clicking the 'Select' button in the Insert Hyperlink dialog.

- Choose the target from the list.
- Click OK and Click OK again.

Sorting: To make it easier to choose a hyperlink destination in a long list, click the Sequence, Style and Text labels. This orders the list by the content listed under the label. Clicking the same label again toggles the sort order between ascending and descending order.

The Typefi Hyperlink is now created and recognisable through its mark-up in the text.

The snowman was very happy it was winter. As the [HYPERLINK:Bookmark<weather>](#) was just all that much better and it allowed him to stand tall. ¶

Hyperlink display text can be edited at any time.

Bookmarks

Bookmarks are another document navigation tool. You can insert them as empty anchors or around some text that is highlighted. To use a Bookmark as a target for a Hyperlink, you must first Insert > Bookmark and name the Bookmark in Word.

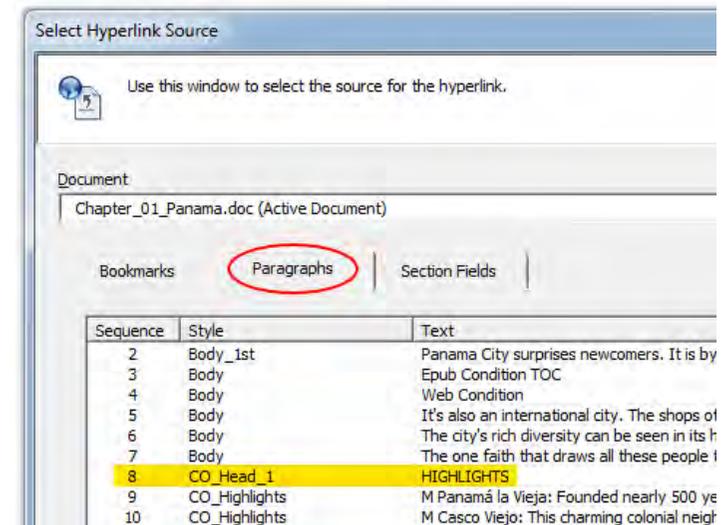
Paragraph

To use a paragraph that has a particular paragraph style applied to it as a hyperlink target, you must first ensure that the paragraph style is enabled as an allowable source in the Typefi project's Cross-references settings. Those paragraph styles allowed as a Cross-reference source will be listed as possible hyperlink targets. This can only be done by someone who has access to the project files on the Typefi Server.

Section Fields

As with Paragraphs, you must first ensure that the Section Fields are allowed as a Cross-reference Source in the project's Cross-references configuration. Those Section Fields listed as an allowable Cross-reference Source are available as a hyperlink target. Again, this can only be done by someone who has access to the project files on the Typefi Server.

Note: You cannot hyperlink to a Project Field, but you can create a Cross-Reference to one.



Having chosen the current document and the type of source (Paragraph Styles), the particular heading can then be selected.

Edit Hyperlink

You can edit Hyperlink display text and target settings.

To edit the Hyperlink display text:

- Either insert the cursor between the '<' and '>' markers or highlight the current text displayed between the markers in the text and make the relevant changes.

To edit the Hyperlink target:

- Double click the Hyperlink marker in the Word document. The Edit Hyperlink dialog appears.
- Click Select to display the Select Hyperlink Source dialog.
- Choose the new target.
- Click OK to return to the Edit Hyperlink dialog.
- Click OK to update the Hyperlink.

Alternatively, you can use the Document Explorer to edit the hyperlink:

- Locate the Hyperlink in the Typefi Document Explorer and click Edit. The Edit Hyperlink Dialog appears.
- Next click Select to display the Select Hyperlink Source dialog.
- Choose the new target.
- Click OK to return to the Typefi Document Explorer.
- Click Close to return to Word.

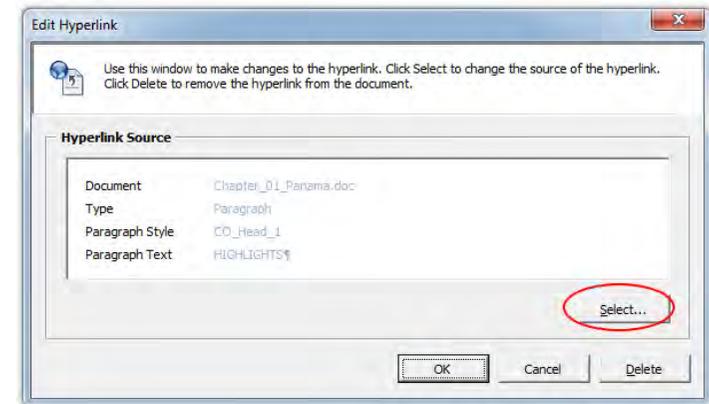
Delete Hyperlink

To delete the Hyperlink Destination:

- Double click the Hyperlink marker in the Word document. The Edit Hyperlink dialog appears.
- Click Delete. The Delete Hyperlink message appears.
- Click Yes to delete the Hyperlink or click No to return to the Edit Hyperlink dialog.
- Click OK to return to the Word document.

Alternatively, you can use the Document Explorer to delete the hyperlink:

- Locate the Hyperlink in the Typefi Document Explorer.
- Click Delete. The Delete Hyperlink message appears.



Editing the source of a Hyperlink

- Click Yes to delete the Hyperlink or click No to return to the Document Explorer.
- Click Close to return to Word.

The display text for the hyperlink is no longer a hyperlink, but the text remains.

Cross-References

Cross-References are used to point the readers of a document to other sources of information located elsewhere in the same chapter or another chapter. We're using Cross-References in this user guide as a way of directing you to locations in the text where you can find related information or more in-depth information about topics discussed.

Typefi Cross-References enable the author to mention sources such as other documents; particular paragraphs; bookmarks; and even Section and Project Fields. The Cross-Reference text can either be defined by the author, or can be taken from the source. Cross-references can point to text or page-numbers and may be converted to hyperlinks on the fly.

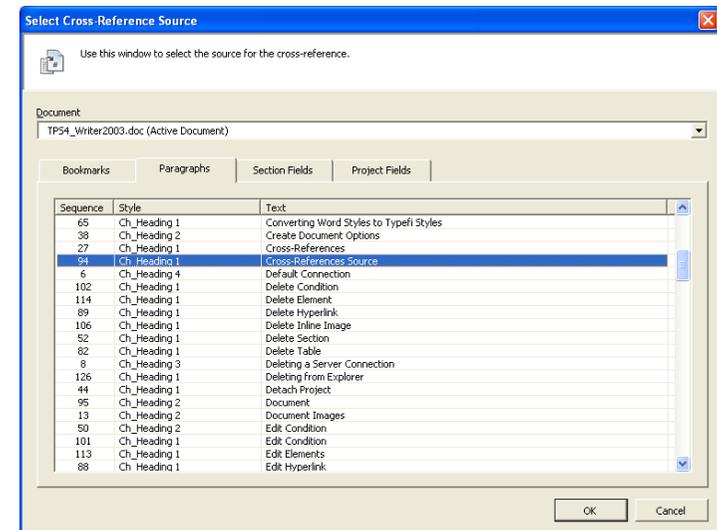
Insert Cross-Reference

Cross-References get their content from the Cross-Reference Source. For instance, a Cross-Reference could point to a particular heading in the text and copy the text of this heading into the cross-reference text, e.g.: (see 'Cross-References' on p.45).

New technique: In earlier versions of Typefi Publish you could turn existing highlighted text into a cross-reference. If you want to convert existing text into a link that points to a position elsewhere in your document in the current version of Typefi Publish you must use a Hyperlink.

To insert a Cross-Reference:

- Place your cursor within a paragraph at the cross-reference insertion point.
- Choose Typefi > Insert Cross-Reference or click the Insert Cross-Reference icon in the Typefi toolbar. The Insert Cross-Reference dialog appears.
- Click Select.... The Select Cross-Reference Source dialog is displayed.



Selecting a Cross-Reference Source, using Paragraph Styles as Source.

- Choose the Document that contains the source for the Cross-Reference.

By default the Active Document is selected. However, if you check out other documents that are part of the same Typefi project, you may choose that. When publishing a job containing inter-document cross-references, you must publish content from the Typefi Publish Server. During the page-composition the cross-references will be resolved.

- Next click either Bookmarks, Paragraphs, Section Fields or Project Fields.
- Choose the Cross-References Source from the list.
- Click OK.
- Choose the Cross-Reference Result from the two choices that appear, and Select Hyperlink to turn the Cross-Reference into a Hyperlink.
- Click OK again.

A Cross-Reference marker has now been inserted in the text and stands out by its default orange background color.

Result

The Result section of the Insert Cross-Reference dialog determines what content is inserted at the cursor. Cross-References will contain either source text or a page number. (Usually, authors insert a text cross-reference followed by the page number cross-reference.)

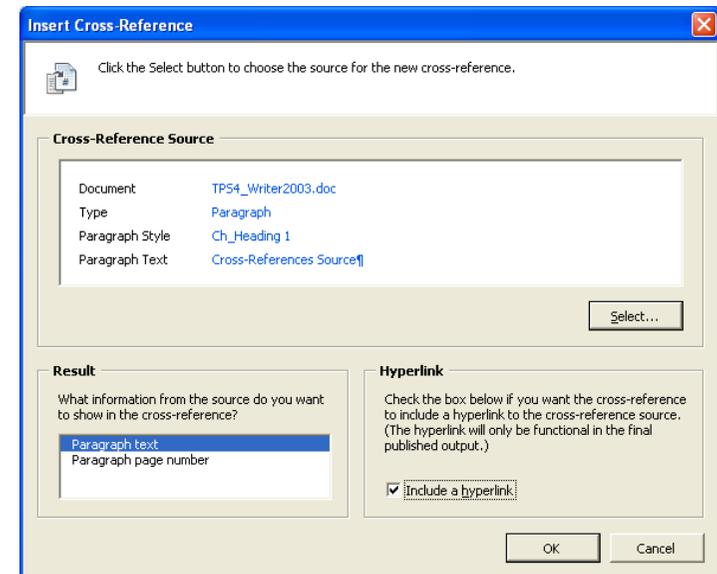
Note: In Word, you will not see the actual content of the cross-reference – only the Typefi markup indicating a CROSS-REF and the type of content it is a reference to. The correct content will appear in the final job output.

Source Text

Depending on whether a Cross-Reference points to a Bookmark, Paragraph Style, Section or Project field, the Cross-Reference text will contain one of the following:

- Paragraph Text: all of the text set in the paragraph that is selected as a source is inserted as source text. Generally you would direct your Cross-References to headings of various levels, but be careful. If you choose a paragraph that contains many lines, the entire content will be inserted as your cross-reference source. You might want to consider using a Hyperlink in that case.

Tables, unless inserted as content for an Element (see **CROSS-REF: SectionField**, p. **CROSS-REF: SectionField**) are tables that place inline with text, the tables will always *Example of a Cross-Reference to a Section field, followed by another Cross-Reference to the page number of the same Section field.*



Insert Cross-Reference, with Result set to Paragraph text, and Hyperlink enabled.

- Bookmark text: the text that was selected in Word when the bookmark was created.
- Section field text: content of the field inserted at the start of a Typefi Section.
- Project field text: content of one of the Project fields (such as Author). This is either sourced from the Typefi project settings on the Typefi Publish Server, or from the Typefi Print dialog in Word (see [Project Fields](#), p. 227).

Source Page Number

The source page number inserts the page number where the cross-reference source commences. For example, if a source runs over multiple pages, the page number of the page where the source starts is inserted.

Source page numbers can point to the page location of the Bookmark, Paragraph, Section field, or Project Field, and are listed as:

- Bookmark page number
- Paragraph page number
- Section field page number
- Project field page number

Hyperlink

Enabling the 'Include Hyperlink' setting modifies a Cross-Reference to include an interactive hyperlink during page composition.

Edit Cross-Reference

Cross-Reference sources can be edited after insertion.

To edit a Cross-Reference:

- Double click the CROSS-REF marker in the Word document. The Edit Cross-Reference dialog appears.
- Click Select to display the Select Cross-Reference Source dialog.
- Choose a new source.
- Click OK to return to the Edit Cross-Reference dialog.
- Click OK to update the Cross-Reference.

Alternatively, you could use the Document Explorer:

Cross-Reference Source

Document	Chapter_01_Panama.doc
Type	Paragraph
Paragraph Style	Head_3M
Paragraph Text	M Panamá La Vieja ¶

Select...

Result

What information from the source do you want to show in the cross-reference?

- Paragraph text
- Paragraph page number

Hyperlink

Check the box below if you want the cross-reference to include a hyperlink to the cross-reference source. (The hyperlink will only be functional in the final published output.)

Include a hyperlink

Editing a Cross-Reference.

- Locate the Cross-Reference in the Typefi Document Explorer and click Edit. The Edit Cross-Reference Dialog appears.
- Next click Select to display the Select Cross-Reference Source dialog.
- Choose a new source.
- Click OK to return to the Typefi Document Explorer.
- Click Close to return to Word.

Delete Cross-Reference

To delete the Cross-Reference:

- Double click the CROSS-REF marker in the Word document. The Edit Cross-Reference dialog appears.
- Click Delete. The Delete Cross-Reference message appears.
- Click Yes to delete the Cross-Reference or click No to return to the Edit Cross-Reference dialog.
- Click OK to return to the Word document.

Alternatively, you could use the Document Explorer:

- Locate the Cross-Reference in the Typefi Document Explorer.
- Click Delete. The Delete Cross-Reference message appears.
- Click Yes to delete the Cross-Reference or click No to return to the Document Explorer.
- Click Close to return to Word.

The CROSS-REF tag disappears from the text.

Conditions

You may need to produce a version of a document that has some differences to the original, yet is largely the same. Rather than maintain two or more files, you can use 'conditional' markup in the one file, and print whichever one you need. Conditional formatting of content allows the mark-up of Sections, Elements, Images and Text for inclusion or exclusion when content is published through Typefi Publish.

When could you use conditional formatting?

- When publishing a teacher and student edition of a publication, you would want the answers to the questions to appear only in the teacher edition.
- When writing marketing or technical documents in a combined US English and UK English document. (You're reading an example. Typefi publishes its User Guide in US and UK English language, and indeed different spellings like colour/color are both inserted and marked up with conditions so that the correct version appears in the particular edition of the publication.)
- When developing software documentation for an application that runs on Mac or Windows OS and you would like to publish unique editions for each Operating System.
- When working on catalogues or product factsheets that you must produce with prices in either Euros, US Dollars or Australian Dollars.
- Or creating a Limited Edition and a Full Edition of a publication, where the Limited Edition excludes all graphics.

These are just some examples of where conditions could become useful and allow you to use a single content file to produce different editions of a publication.

Conditions are only available to the Typefi Writer in Word when they have been inserted at Typefi project level (see UNRESOLVABLE CROSS-REFERENCE in the Typefi Server User Guide) first. Any content marked up with a condition not only sits between condition markers, but is also highlighted in a condition-specific color. These colors are also defined at project level on the Typefi Publish Server.

Insert Condition

You can use conditions at various levels with Typefi Writer. The highest level of content that can be marked up with a condition is a Typefi Section.

Conditions and Sections

When you markup a Typefi Section with a condition, it means that all content within that section is included as part of the condition. For instance, in a Teacher/Student publication, the teacher edition might have additional sections included at the back of the publication with in-depth answers to end-of-chapter questions; or specific training instructions.

You can set a condition for a Section when inserting the section, or when editing the section. (see [Sections](#), p. 178).

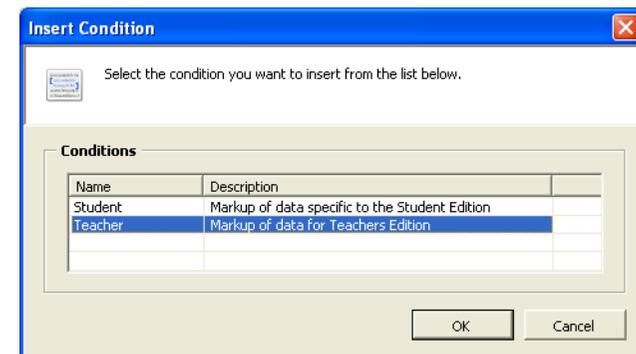
- Click the Condition tab in the Insert Section/Edit Section dialog to view the conditions.
- Select the condition(s) that must be applied to the section.
- Click OK.

Conditions for other content

Conditions contain two components: the content and the condition that marks up this content.

To insert a Condition:

- Highlight the content that is to be conditionalized or insert the cursor at a location where you would like to add some content after the Condition is added.
- Choose Typefi > Insert Condition or click the Insert Condition icon in the Typefi toolbar. The Insert Condition dialog appears.
- Click the Condition you want to use.



Inserting a Condition.

- Click OK.

The condition has now been inserted in your document and is recognisable by its distinctive markup.

If you've not yet inserted the conditionalized it is now time to insert the content:

- Insert your cursor between the '<' and '>' markers.
- Insert the content that is to be conditionalized .

A word about Conditions and Nesting

Where a condition is 'nested' (one condition fully encapsulates a second condition), the content of the nested condition can not be published on its own.

Let's look at an example. A sentence within a paragraph marked-up with a Student condition is also marked up with a Teacher condition.

When publishing to Typefi Publish with the Only Teacher Condition & non-conditional content included for output you'll find that no data is published for this paragraph.

When publishing with only the Student condition & non-conditional content, both Student and Teacher content are published.

This behaviour is identical when a condition is entered at Section level and other conditions are inserted within the section.

Edit Condition

Conditional content and the Conditions themselves can be altered after they've been added to the document.

To edit the Conditional content:

- Either insert the cursor between the '<' and '>' markers or highlight the current text displayed between the markers in the text and make the relevant changes.

To change the Condition:

- Double click the Condition marker in the Word document. The Edit Condition dialog appears.
- Choose the new condition.
- Click OK to update the Condition.

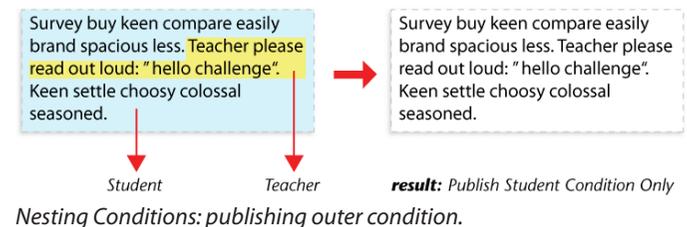
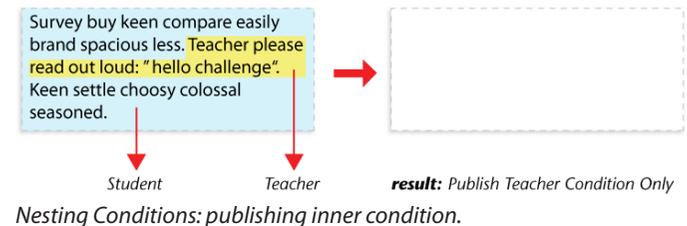
Questions:

Name two purposes for the Typefi Writer?

CONDITION: Teacher<The Writer is used to provide authors and editors with an easy to use editorial markup tool. In addition it allows for publishing of content from Word to professionally designed PDFs.>

What is the first object that every Word document must contain?

Condition applied to highlighted text.



Alternatively, you could use the Document Explorer:

- Locate the Condition in the Typefi Document Explorer and click Edit. The Edit Condition Dialog appears.
- Choose the new condition.
- Click OK to return to the Typefi Document Explorer.
- Click Close to return to Word.

Delete Condition

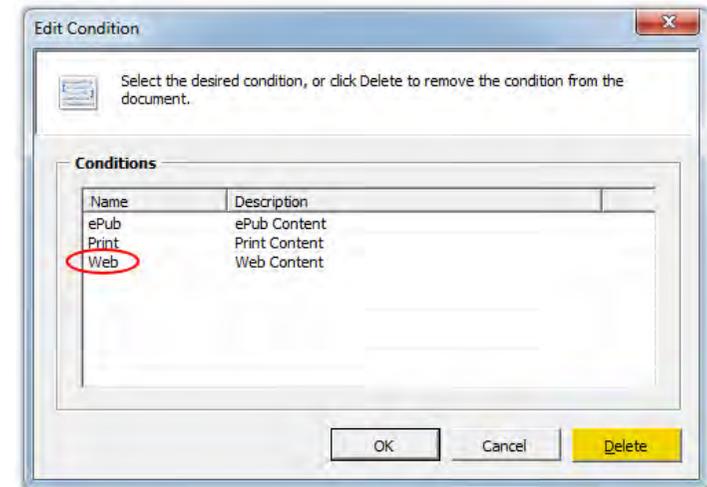
To delete a Condition:

- Double click the Condition marker in the Word document. The Edit Condition dialog appears.
- Click Delete. The Delete Condition message appears.
- Click Yes to delete the Condition or click No to return to the Edit Condition dialog.
- Click OK to return to the Word document.

Alternatively:

- Locate the Condition in the Typefi Document Explorer.
- Click Delete. The Delete Condition message appears.
- Click Yes to delete the Condition or click No to return to the Document Explorer.
- Click Close to return to Word.

The content stays in the Word document, but it is no longer marked up as a condition and will always appear when the content is published through Typefi Publish.



Editing Conditions.

Inline Images

Typefi's Insert Image command always generates inline images. Inline images are graphics that are placed within a paragraph's content. They flow with the text as more content is inserted or when content is removed.

About Images

As we discussed earlier, images inserted either as Inline Images, or as part of Typefi Element data, must be saved in a file format that is supported by Typefi Publish (see [Image file formats](#), p. 163).

Typefi does not embed images in Word, but it does create a link to the image file. (This means that when you insert images in the documents you must have access to the files.) Each image that is placed is automatically added by the FileManager application to the Images repository that is part of the Typefi project to which your Word document belongs. (see Images in the Typefi Publish Server Guide). Typefi then uses the images from this repository when publishing the content.

If an image in its original storage location is updated (possibly by a graphic designer who created the image), and you publish the Word document again, you'll be prompted by FileManager asking you if you'd like to update the image.

Insert Image

You can insert images anywhere within a paragraph and they will resize according to the inline image resize behavior the production designer has defined for inline images as part of the paragraph style. Inline images can also sit in a paragraph on their own, and as with images placed within a paragraph image resize controls are defined by the paragraph style and not visible until you publish the document.



FileManager warning about an updated image.

To insert an image:

- Insert the cursor at the image insertion point in a paragraph.
- Choose Typefi > Insert Image or click the Insert Image icon in the Typefi toolbar. The Insert Image dialog appears.
- Click Browse..., the Select Image dialog appears.
- Navigate to the Image and select it.
- Click Select. You return to the Insert Image dialog and the filename and path are inserted. Enter a Comment (optional).
- Click OK.

The image is now inserted. Depending on whether you have the 'Show document images' setting enabled in Typefi Preferences (see [Document Images](#) on p.162), you'll either see an IMAGE: marker followed by the filename, or an image preview (with limitations, such as Word not being able to display certain valid file types).

Comments

The Comments field in the Edit/Insert Image dialog can contain text. When Typefi Publish can't locate an image during page-composition, the text found in the Comment field is inserted instead.

Comment field text could also be used in cases where documents are published to InDesign as well as to HTML (Web). The data could be used to populate the "Alt" tag required for accessibility reason.

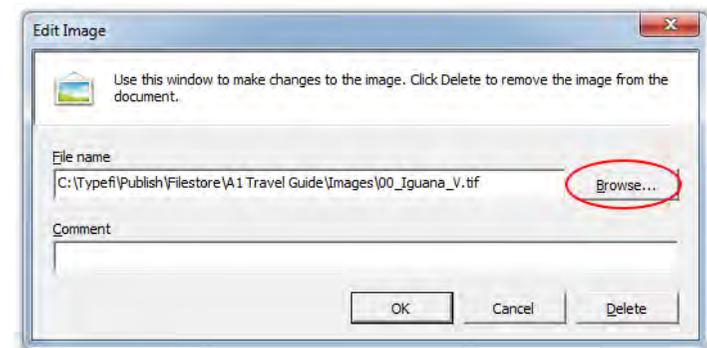
Edit Image

Images can be replaced by other images, or comments may be edited at any time.

To edit the image:

- Double click the IMAGE marker in the Word document or double click the image itself if you are previewing it in Word. The Edit Image dialog appears.
- Click Browse. The Select Image dialog appears.
- Navigate to the replacement image and select it.
- Click Select to return to the Edit Image dialog, and make a change in the Comment if needed.
- Click OK to update the Image.

To move items from column 1 to column 2 click the **IMAGE: 1xRight.png** icon
To move items from column 1 to column 2 click the  icon
Typefi Inline IMAGE marker (top), previewed (bottom)



Inserting or editing the link to an image.

Alternatively, you could use the Document Explorer:

- Locate the Image in the Typefi Document Explorer and click Edit. The Edit Image dialog appears.
- Click Browse. The Select Image dialog appears.
- Navigate to the replacement image and select it.
- Click Select to return to the Edit Image dialog, and make a change in the Comment if needed.
- Click OK to return to the Typefi Document Explorer.
- Click Close to return to Word.

Delete Image

To delete an Image:

- Double click the Image marker in the Word document, or double click the image itself when you are previewing the images in Word. The Edit Condition dialog appears.
- Click Delete. The Delete Image message appears.
- Click Yes to delete the Image or click No to return to the Edit Image dialog.
- Click OK to return to the Word document.

Alternatively, you could use the Document Explorer:

- Locate the image in the Typefi Document Explorer.
- Click Delete. The Delete Image message appears.
- Click Yes to delete the image or click No to return to the Document Explorer.
- Click Close to return to Word.

The image has now been removed from the document.

Elements

Elements are objects or groups of objects that are distinguished from the core text in a publication by their difference in design. Element content is built-up dynamically during page composition before it is placed on the page by the Typefi Publish System.

As an example, some of the element components might resize as other related components change in size - based on the content they receive. For instance, if an image is related to a caption and the image is made smaller during page composition, the distance between the bottom of the image and the caption should probably be maintained. The Element design and resize behaviour is defined by the production designer working in InDesign.

Element Types

There are three different types of Elements: fixed, floating and inline. Each Element type has its own characteristics and functionality in page design. However, the method of Element insertion in the Word document is similar for each of the Element Types.

Fixed Elements

A Fixed Element is an element that is inserted at the start of a section and is inherently linked to that section. Therefore a Fixed Element will only be available for insertion when you are indeed inserting the Element in its related section. Additionally a Fixed Element can only be inserted once in a section. This means that if you've already inserted it in a section, the Element will no longer be listed as an available element for the section.

An example of a fixed element could be:

- A special object on the first page of a chapter (new Section) containing the Objectives information (Educational sample).
- Placement of an author's photo with caption at the start of each Article (Typefi Section).

Inline Elements

Inline Elements are elements that are inserted in, and move with the text. Additionally, they may be located in 'anchored object' positions defined by the production designer (such as outside the text column). Inline elements may be inserted as often as needed, and may contain a variety of content (such as an image and caption).

Floating Elements

Floating elements are elements that are placed as individual objects during the page-composition process. They are positioned based on pre-defined layout rules added by the production designer to the InDesign template that is used as the basis for the page-composition. Like Inline Elements, Floating Elements may be used more than once per section, and may contain a variety of content for each occurrence in a document.

Variants

In contrast to Inline Elements which have one appearance, Floating Elements can be designed by the production designer to have multiple appearances. Each of these appearances is referred to as a Variant. When the variants are named, you may choose (during the insertion process) which of them Typefi Publish must use during page composition.

Example of Variants:

- A Figure Element that has both a Portrait (vertical) and a Landscape (horizontal) variation. Depending on the orientation of the image you are using, you will select the relevant variant when inserting the element.
- A Margin Note Element that has a slightly different design for left and right pages. In this case, the production designer would design the variations and you would insert the Margin Note without making reference to a specific

variant. (Typefi Publish will choose the correct variant based on whether the note appears on a left or right hand page.)

Insert Elements

You should insert Elements at the end of a paragraph, as inserting elements mid-paragraph results in the paragraph 'breaking' at that point. In cases where an Element must be placed as close as possible to related topic content in the text, you may add an Element Reference in that location after inserting the element. This reference may appear anywhere within paragraph text.

Elements can prompt you for three different types of content:

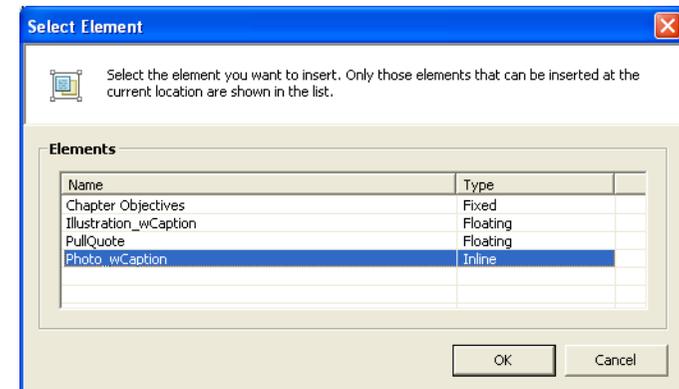
- Text
- Image data
- Field data

Depending on the complexity of an element (which is controlled by the production designer) you might be prompted to provide specific content as you insert the Element into Word.

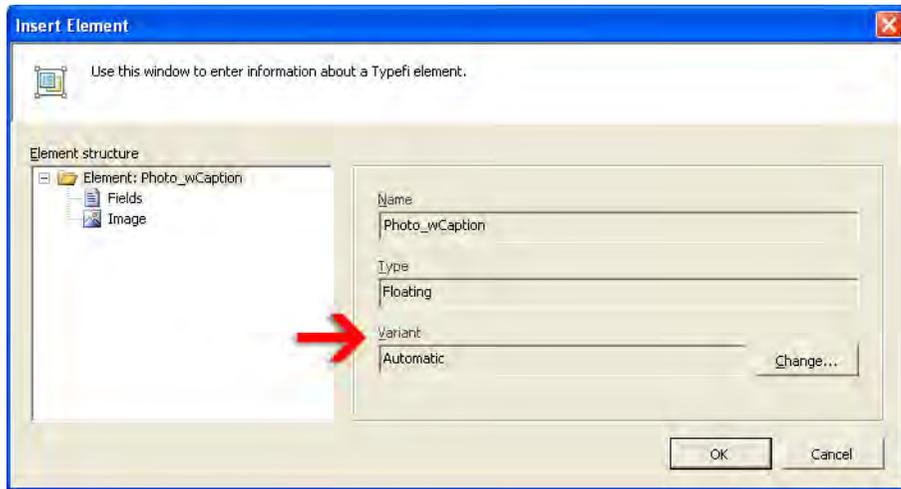
Let's have a look at inserting a simple element that contains each of the three content types: a photo with caption and photographer's name added as field data to the side of the element during page-composition.

To insert an Element:

- Insert the cursor at the end of a paragraph, before the paragraph return character.
- Choose Typefi > Insert Element or click the Insert Element icon in the Typefi toolbar. The Select Element dialog appears.
- Choose the Element you want to insert.
- Click OK.
- The Insert Element dialog appears, displaying the Element Structure from top to bottom on the left side.



Insert Element



Entering information about a Typefi element, including choosing the Variant.

Change Variant (Floating Elements Only)

If you've inserted a Floating Element, you have the option to choose the required Floating Element Variant at this stage. For Fixed and Inline Elements this option is not available. The default Variant setting is Automatic, which means that the Typefi Engine will decide which Variant to place during page-composition. In this sample element there is the option to choose a Portrait or Landscape variant.

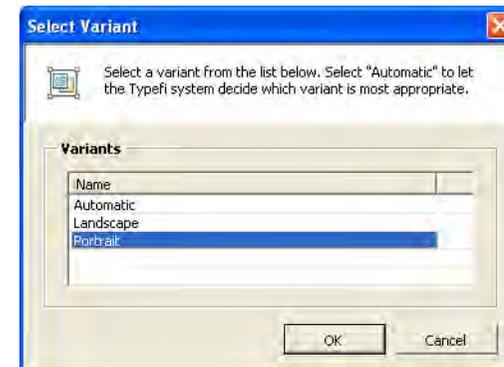
To change the Variant Setting:

- Click Change... The Select Variant dialog appears.
- From the List of available Variants choose the Variant you want to use.
- Click OK.

You will then return to the Insert Element dialog.

Element Fields

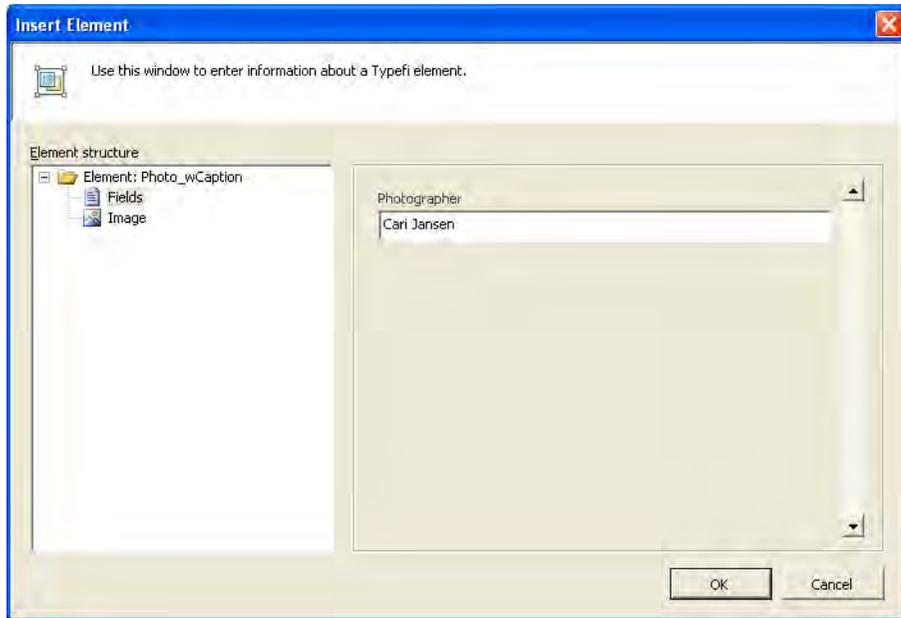
A good method for assigning values or data to the different content types that are part of an element is to work your way from the top down in the Element structure view. Elements can be pretty complex, especially when they contain nested Elements and using this top-down approach assists in ensuring the content for all the element objects listed in the structure is set.



Select the Variant from the list.

To set Field values:

- Click the Fields node in the Element structure.
- Enter field values for each field.
- Select the next item in the Element structure, or click OK if you've finished setting all of the Element data, and the Element will be inserted.



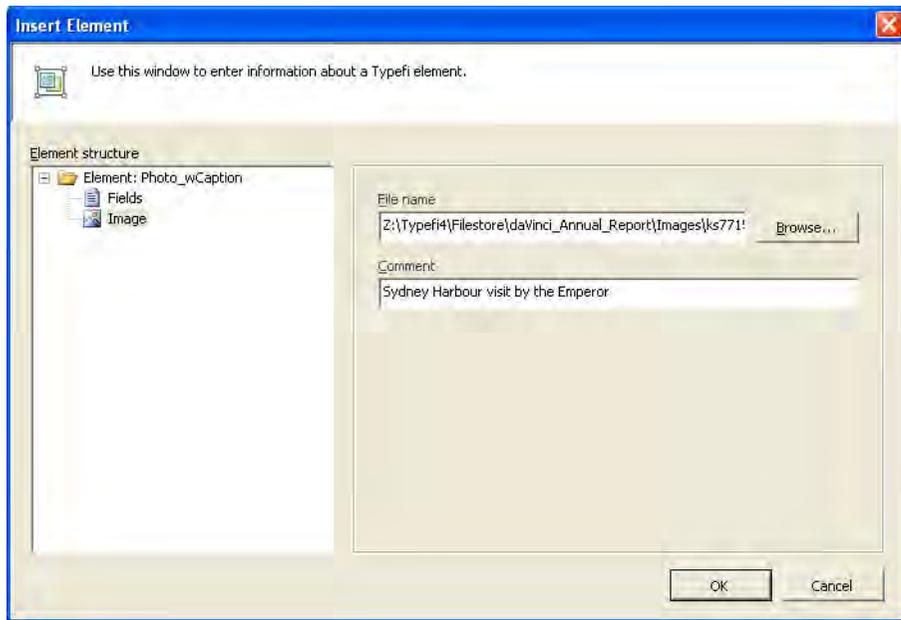
Setting Field information in sequence.

Element Image

If an Element contains an image, a link to the image on your computer or a server volume must be established.

To set the Image link and comments:

- Click the Image node in the Element structure.



Insert Element - specifying image location.

- Click Browse..., and the Select Image dialog appears.
- Navigate to the image and select it.
- Click Select. You will return to the Insert Element dialog and the full filename is inserted. Enter a Comment (optional).
- Click OK (or continue clicking through the rest of the Element Structure if there are more items listed that need information entered).

The Element now appears in the Word document, recognisable by its ELEMENT and END ELEMENT markers.

Edit Elements

If at any stage you want to change an Element's image link, content, or field values, you have the option to edit the element.

To edit an Element:

- Double click the ELEMENT marker in the Word document. The Edit ELEMENT dialog appears.

```

ELEMENT 1: Photo_wCaption
Photographer: Carl Jansen
Element Image: ks77150.jpg
Emperor visiting Sydney Harbour.
END ELEMENT
  
```

Element inserted in Word

- Click on the component you'd like to edit (e.g. click Fields if you want to edit the Field values).
- Make the changes and click OK to return to the Word document.
- Click Close to return to Word.

If you know in advance that you'd like to edit a particular content component that is part of the element, you can start by double-clicking that component marker within the Element and the Edit Element dialog will open with the correct object already selected in the Element Structure.

Alternatively, you can use the Document Explorer:

- Locate the ELEMENT in the Typefi Document Explorer and click Edit. The Edit ELEMENT dialog appears. (You can also locate the component within the Element Structure and select that first, then click Edit.)
- Click on the component you'd like to edit (e.g. click Fields if you want to edit the Field values).
- Make the changes and click OK to return to the Typefi Document Explorer.
- Click Close to return to Word.

Delete Element

When you delete an Element, only the text content stays behind in the Word document. Images and fields are removed from the Word document.

To delete an Element:

- Double click the ELEMENT marker in the Word document. The Edit Element dialog appears.
- Click Delete. The Delete Element message appears.
- Click Yes to delete the Element or click No to return to the Edit Element dialog.
- Click OK to return to the Word document.

Alternatively:

- Locate the Element in the Typefi Document Explorer.
- Click Delete. The Delete Element message appears.
- Click Yes to delete the Element or click No to return to the Document Explorer.
- Click Close to return to Word.

Element Reference

An Element Reference is a marker that links a Typefi Element to a specific location in the text. These markers are used during the page-composition process in conjunction with placement rules assigned to the element by the production designer to determine where the Element is best placed on the page.

For instance, a keyword note displayed in the margin of a publication that defines a keyword used in the text might have its element reference set just after the keyword is mentioned, so that the margin note will line up with the keyword during page-composition.

Insert Element Reference

As discussed earlier you should not insert an Element mid-paragraph as this would result in insertion of a paragraph break. Element References are the best way to link an element to any location within a paragraph.

To avoid page-composition errors, don't insert multiple Element References that point to the same element.

To insert an Element Reference

- Place the cursor at the insertion point in the text.
- Choose Typefi > Insert Element Reference or click the Insert Element Reference icon in the Typefi toolbar. The Insert Element dialog appears, listing all elements that have been inserted in the active Typefi Section.
- Select the relevant Element.
- Click OK.

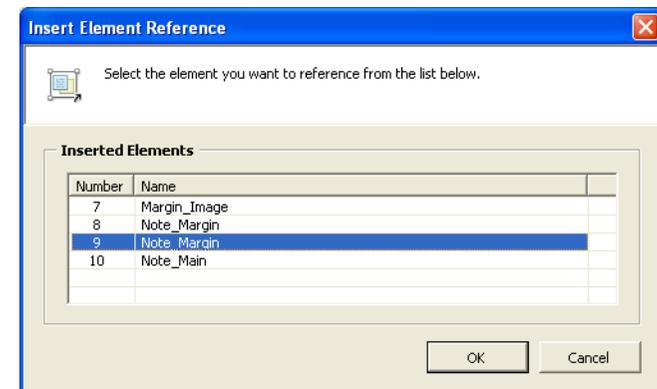
An ELEMENT REF marker appears at the insertion point in the text.

Edit Element Reference

If you want to change the Element Reference to a different Element, then edit the Element Reference.

To edit the Element Reference:

- Double click the ELEMENT REF marker in the Word document. The Edit Element Reference dialog appears.



Insert Element Reference

- Choose the new Element Reference.
- Click OK to update the Element Reference.

Alternatively, you can use the Document Explorer:

- Locate the Element Reference in the Typefi Document Explorer and click Edit. The Edit Element Reference Dialog appears.
- Choose a different Element Reference.
- Click OK to return to the Typefi Document Explorer.
- Click Close to return to Word.

Delete Element Reference

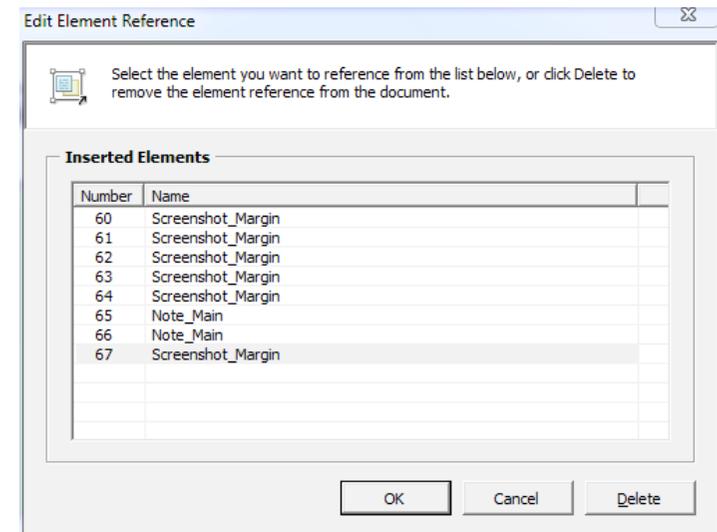
To delete an Element Reference:

- Double click the ELEMENT REF marker in the Word document. The Edit Element Reference dialog appears.
- Click Delete. The Delete Element Reference message appears.
- Click Yes to delete the Element Reference or click No to return to the Edit Element Reference dialog.
- Click OK to return to the Word document.

Alternatively, you can use the Document Explorer:

- Locate the Element Reference in the Typefi Document Explorer.
- Click Delete. The Delete Element Reference message appears.
- Click Yes to delete the Element Reference or click No to return to the Document Explorer window.
- Click Close to return to Word.

The ELEMENT REF marker has now been removed from the text.



Changing or deleting an Element Reference.

Writer Markup and Document View

Typefi Markup is the code that is added to the Word file as you insert Typefi objects.

Typefi markup is formatted to stand out from normal Word content. Each of the Typefi Markup styles is listed with a TPS acronym prefix in the Styles and Formatting list in Word, and you may modify their appearance (e.g. Make the background a different color).

Convert to Tags

It is possible to change the Typefi markup to 'Tags' rather than 'Fields'. When Tags are displayed you will not be able to edit the Typefi components by double clicking them. Take great care when editing Typefi components in this mode. Deleting a component's Start or End Markers causes errors in the document that would result in page-composition errors or publishing failure. Use the Typefi Document Explorer (see [Typefi Document Explorer](#), p. 220) to verify that all Typefi components are still valid.

Global find/replaces

Tags can be useful, such as a situation in which you want to globally change Typefi markup. For example: (a) assign a new Element to an old Element; (b) apply a condition with a new name to old conditions; or (c) change a path reference for images. When displaying the document markup tags in the Word document, you will be able to perform global search and replace tasks throughout your document.

```
<SectionName="Chapter".ID="821EB2C4-4A8C-5C4A-9A60-CFFB8C83B106"/>¶  
<SectionField-Name="ChapterNumber".Value="(AutoNumber)"/>¶  
<SectionField-Name="ChapterTitle".Value="Biography"/>¶  
<SectionConditions-Value="Teacher"/>¶
```

Typefi markup converted to Tags.

Convert to Fields

Fields are the default Writer markup that is used to display Typefi components in Word. Unless you want to specifically see the code behind the scene or the xml tags, you would always work in Field view mode when editing a Word document with the Typefi Writer.

View Field Codes

Viewing the Field Codes will display all of the complexity behind the default Field view. It's a little daunting to look at a Word document marked up with Typefi Writer in this mode.

Don't worry, your document is easily viewed in its default Field view again:

- Choose Typefi > Mark-up > View Field Codes.

This command behaves as an on/off toggle and Shows/Hides the codes depending what is active or not.

Note: When Field Codes are displayed you will not be able to edit Typefi components by double-clicking them.

Re-Apply Styles

If your document contains any style overrides on Typefi Markup styles, the Re-Apply Styles command will reset these styles to match the Style and Formatting they have in the Pick formatting to apply list in Word.

To re-apply Typefi Markup Styles:

- Choose Typefi > Markup > Re-Apply Styles.

Reset Styles

It could be that you've altered the appearance of the Typefi Markup styles in the Active Document, but want to reset these styles to their standard appearance. The Reset Styles command does just that.

To reset the Typefi Markup styles to their original settings:

- Choose Typefi > Markup > Reset Styles.

```
SECTION:·Chapter¶  
ChapterNumber:·(AutoNumber)¶  
ChapterTitle:·Biography¶  
Conditions:·Teacher¶
```

Convert to Fields, View Field Codes disabled.

```
{·MACROBUTTON·TPS_Section·SECTION:·Chapter{Name="Chapter";ID="821EB2C4-4A8C-5C4A-9A60-CFFB8C83B106"}}¶  
{·MACROBUTTON·TPS_SectionField·ChapterNumber:·(AutoNumber){Name="ChapterNumber";Value="(AutoNumber)"}¶  
{·MACROBUTTON·TPS_SectionField·ChapterTitle:·Biography{Name="ChapterTitle";Value="Biography"}}¶  
{·MACROBUTTON·TPS_SectionConditions·Conditions:·Teacher{Value="Teacher"}}¶
```

Field Codes displayed.

Refresh Document

The Refresh Document option performs a series of tasks on a Word document that is linked to a Typefi Project:

1. Ensures all condition colors are properly applied.
2. Updates any obsolete document markup to the version 5.x format.
3. Repaints all markup fields and markup tags using correct markup styles.
4. Removes any obsolete 4.x templates if found.
5. Updates all fields in the document.

Typefi Document Explorer

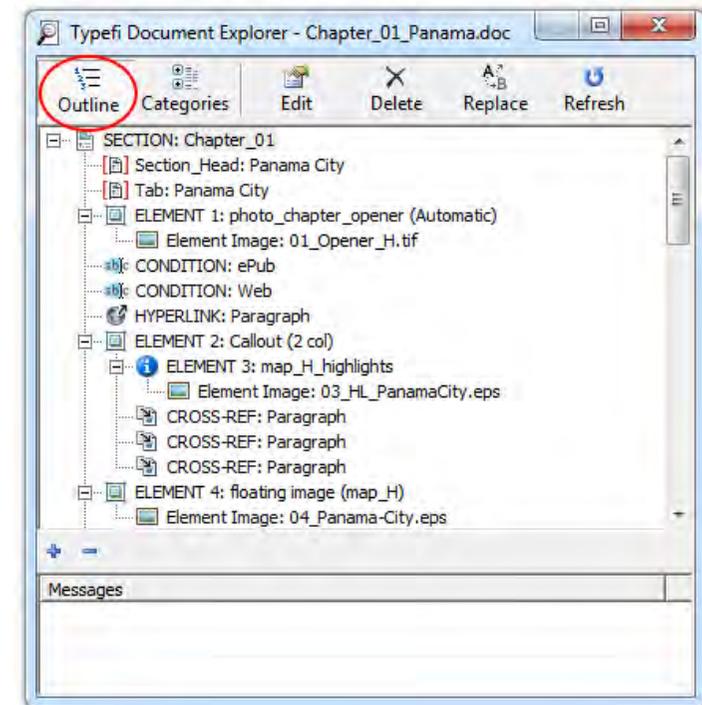
The Typefi Document Explorer is a tool that can be used to view and navigate a document's structure. In addition, the Document Explorer is useful for editing purposes as well as a tool for checking the validity of a Typefi Writer document.

Navigation from Explorer

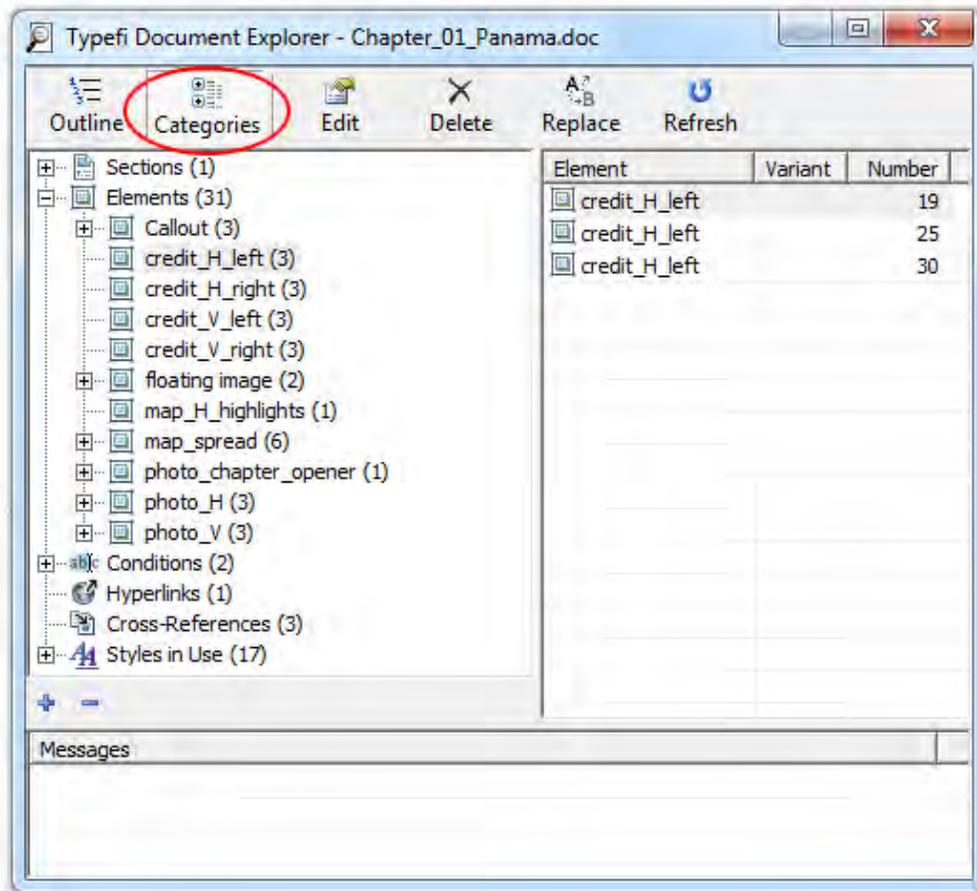
The Document Explorer may be used as a document navigator. There is a choice of two views – Outline or Category. You may find the Category view useful when dealing with one type of Typefi content, such as Elements. Whenever you click on an item in the structure part of the Explorer the cursor position jumps to this item in the Word document.

To display and use the Document Explorer:

- Choose Typefi > Explore Document or click the Explore Document icon in the Typefi toolbar.



Expanded Outline View in Explorer



Explorer's Category View with Elements expanded

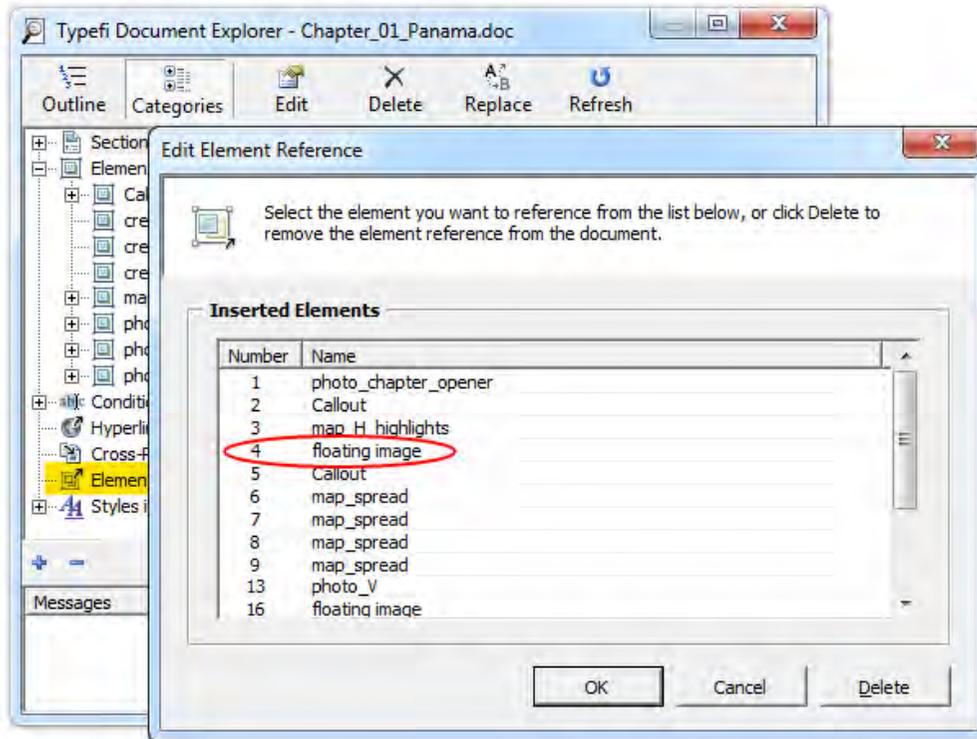
- Choose whether to view the Outline or Categories.
- Click the '+' icon to expand individual Sections/Categories, or display object structures such as an Element structure containing Fields, Image etc.
- Click the '-' icon to collapse an item in the structure.

To navigate using the Document Explorer:

- Ensure you can see the document structure.
- Click an object in the structure and the cursor will jump to that location in the document.

Editing from Explorer

You have seen in most of the previous chapters that the Document Explorer may also be used as an Editing tool. Not only can you locate an object in the document structure and select it, but then you can edit it.



Editing from Document Explorer.

When your cursor is inside the Typefi Markup on the Word page and you open the Document Explorer, the Explorer automatically jumps to the active object.

To edit a Typefi object using the Document Explorer:

- Either place your cursor in the Typefi markup for the object, then choose Typefi > Explore Document or click the Explore Document icon in the Typefi toolbar.

Alternatively:

- Choose Typefi > Explore Document or click the Explore Document icon in the Typefi toolbar and navigate to the object you want to edit.
- Next, click Edit to display the Object's Edit dialog and make the appropriate changes.
- Click OK and Click Close to return to the Word document.

Replacing with Explorer

Explorer is very useful for rapid replacement of any Typefi component (Sections, Elements, Conditions, Character and Paragraph Styles). You can use Explorer to replace ALL instances of one element with a different element type. With the exception of Paragraph and Character Styles, you can replace a component with nothing, thereby removing all instances of that component.

To replace all instances of any Typefi component:

- Click the Explore Document icon in the Typefi toolbar.
- In the Explorer toolbar, click the 'Replace' button.
- Select the type of Typefi component you want to replace from the 'Find What' list on the left.
- Select the particular component sub-type from the list on the right (this list changes automatically to suitable choices).
- Choose its replacement from the 'Replace With' list below. (Leave it empty to just delete the component type.)
- Click the 'Replace All' button.

Deleting from Explorer

To Delete a Typefi object using the Document Explorer:

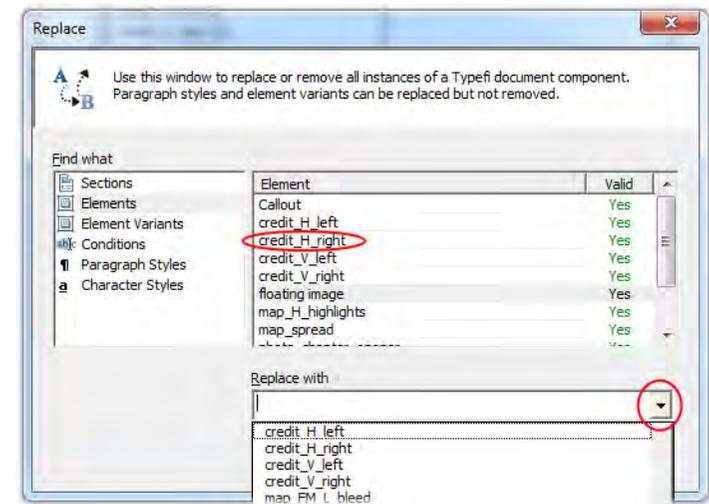
- Either place your cursor in the Typefi markup for the object you want to delete, then choose Typefi > Explore Document or click the Explore Document icon in the Typefi toolbar.

Alternatively:

- Choose Typefi > Explore Document or click the Explore Document icon in the Typefi toolbar and navigate to the object you want to delete.
- Next, click Delete. The Delete 'Object type' message appears.
- Click Yes to delete the Object or click No to return to the Explorer.



The Explorer Toolbar: the Replace button



Replacing all instances of an element with a different type of element is possible using the Explorer.

- Click Close to return to Word.

Finding Errors

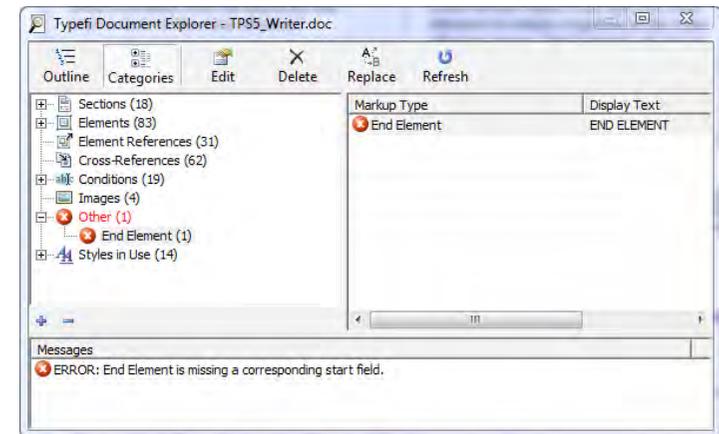
The Explorer checks whether Sections, Fields, Elements, Hyperlinks, Conditions and Cross-References in the active Word document are valid and will display a Warning or Errors in the Word document structure.

A warning appears as a yellow icon. It is advised to fix warnings although they will not prevent a document from being published.

An error appears as a red icon. It indicates a fault in a Typefi object that will cause the page-composition to fail. You must fix all errors prior to publishing the Word document.

To display additional information about an Error or Warning:

- Click the item that is preceded by the warning or error icon.
- The Messages part of the Document Explorer will now display a more detailed message of what's not quite right in the document.



Typefi Document Explorer with warning symbol indicating an error (missing start field from element content)

Publishing Content to Typefi Publish

The ultimate goal of authoring your documents in Word with the Typefi Writer is to publish the content and create the professionally designed output.

Saving Word documents

As with any digital document your files must be stored somewhere. Where you store Word files marked up with the Typefi Writer and linked to a particular Typefi project depends on the work processes used by your organisation.

To simplify things we'll look at two basic scenarios.

Typefi Server

Saving and storing your files with the Typefi project on the Server assists in keeping all the project-related files in one location and allows you to publish content directly from the server by extracting sections from the Word documents and including them in a contents list for publication.

Non-Typefi Server Locations

Files do not have to be stored on the Typefi Publish Server, and may be stored elsewhere on the network. However, to publish the documents through Typefi Publish, the Word user opening the marked-up documents must have a connection to the Typefi Publish Server and be a member of the project to which the file belongs.

Publishing from Word

When publishing a document from Word to Typefi Publish, you should be aware that only the content from the document itself will be published and the Typefi Engine will not be able to resolve Cross-References and Hyperlinks that point to other Word documents that are part of a project.

Typefi Print

To publish a document from Word:

- Choose Typefi > Typefi Print or click the Typefi Print icon in the Typefi Toolbar.

If the document contains any warnings or errors, Typefi Writer will alert you with a message.

- Click Yes to view the warnings in the Typefi Document Explorer and fix errors/warnings first. Or click No to ignore the warnings and proceed with the Print command.

The Typefi Print dialog appears. This dialog allows you to specify the Job option, PDF preset and Field data, and where the resulting PDF will be saved (click the 'Settings...' button).

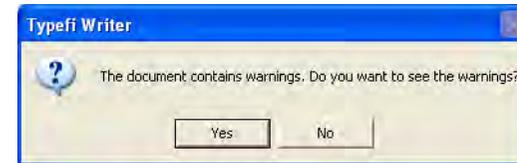
Job Option

The Job Option controls which particular template is used during the page-composition process, whether the document must start with a particular page number, how unresolvable cross-references are handled and more. Basically the choice of job option determines how the eventual output will appear.

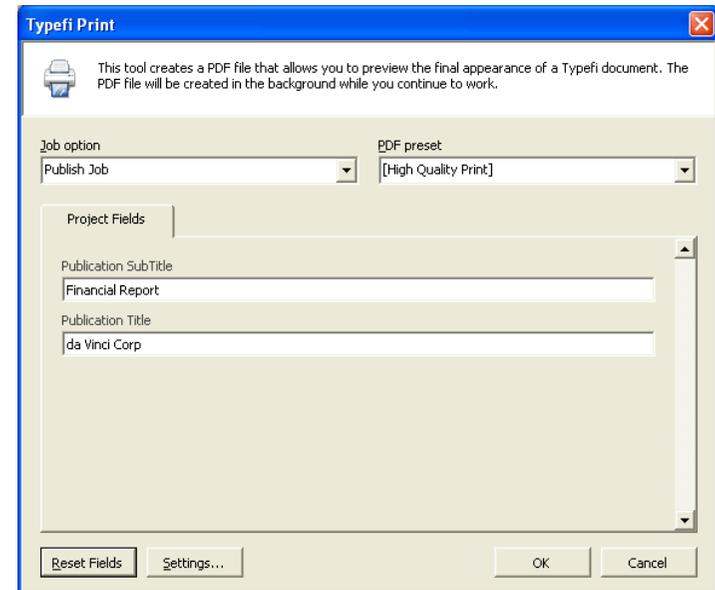
PDF Preset

PDF Presets define the type of PDF file that is created upon completion of the page-composition process. The choices available are related to the settings installed and configured on the Typefi Publish Server.

Generally PDF Presets are characterised by quality and purpose. For instance, a PDF Preset called "For Internet", might be defined to create a PDF file that is small enough to be used online and that also adds some interactivity, such as hyperlinks, cross-references to interactive links, or a series of navigational bookmarks.



Typefi Writer print warning dialog.



Typefi Print dialog.

Project Fields

For Typefi projects that contain project field data, you'll be prompted to enter the field values for the project fields. The default field values are sourced from the Typefi project that is on the Typefi Publish Server.

RESET FIELDS

- Click Reset Fields to reset the Field values to the same values as the values on the server. Alternatively enter your own values. These are typically used to set text content such as a document title, copyright year, ISBN code, or book title as a running header during page-composition.

Settings

The Settings allow you to override the default location in which Word will save the PDF that is output during page-composition.

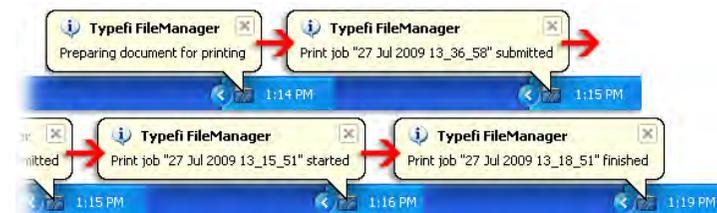
To change the location of published PDF documents:

- Click Settings...
- Click Browse...
- Navigate to the Folder in which you'd like to store the files.
- Select the folder and click Select.
- Click Ok to return to the Typefi Print dialog.

FileManager messages

Once the Print command commences, the FileManager will display a series of messages.

When processing the job for printing, FileManager will prompt you to replace any images that have been modified or updated since they were last uploaded to the images directory. You can click 'No' if you are sure that the images have not changed. This can save upload time...



FileManager pop-up messages



Image warning (this will happen regularly).

Click Yes to replace the image on the Typefi Publish Server, click No to retain the older image on the Typefi Publish server.

At this point, the Word document is converted to CXML which is loaded to the Typefi Publish server and is used as content during page-composition.

During the page-composition process on the Typefi Publish Server, you can continue to work in Word. When the job has been successfully published the FileManager will briefly display a message that the Print Job is finished.

Cancelled jobs

When a print job is cancelled during page-composition the Typefi FileManager will display a 'cancelled' message.

Publishing from Typefi Server

The second method you can use to publish content to Typefi Publish is to upload the Word documents to the Typefi Publish Server and publish them from the uploaded content.

You can disregard this topic if you are only working with Typefi Writer, and do not have access to the Typefi Server.

The advantage of publishing from the Typefi Server is that you have the ability to extract content from multiple Word documents (for instance a series of book chapters), and publish some or all of this content as a single job to a single PDF. In



FileManager - Print job cancelled message

addition, cross-document hyperlinks, cross-references between documents, and table of contents will be resolved.

To publish from the Server you must:

- Have browser access to the Typefi Publish Server; be a member of the Typefi project; sign in to the Typefi Publish Server; and click the project to which the Word documents belong.
- Add all Word files from which content is to be used to the Typefi project on the Typefi Publish Server.
- Update the sections from the Word documents into a Content/Sections repository.
- Assign Content to be used as part of a Job Option.
- Run Job.
- Navigate to the Jobs Monitor and access the resulting PDF as part of the published job.

Word documents to Server

To add files to the Typefi Publish Server and make them part of a project:

- Sign in to the Typefi Publish Server (if you have access permission).
- Click the project name of the project to which the Word document(s) belong.
- Click Add Files.
- Next locate the Word file(s) on your system and select the one(s) to be added.
- Click Choose (on Mac) or Open (on Windows) to add the file to project Templates folder.

Once the Word documents are loaded to the Server, you must extract the content from the Word documents, so that it can be used as content in a Job Option.

Update Sections

The Update Sections command extracts Section-based XML from selected Word documents and places this in the Content/Sections repository.

To update sections:

- Click the project name of the project to which the Word document(s) were added.
- Click Content.

- Select the Word documents from which content must be published.
- Click Update Sections.
- The Word documents will appear to be “checked-out” whilst Typefi Publish extracts content. When content has been successfully extracted the files appear “checked-in” again.

Editing Word documents: Once you’ve added Word documents to a Typefi Project that publishes content from the Server, we advise that you edit the Word documents by checking them out from their project. Make the changes, save the document, check the file back in and then Update the Sections prior to re-publishing a job that uses the Word document’s content.

Job Option

With the Sections data extracted you can now publish the content from multiple Word documents to Typefi Publish.

- Click the project name of the project to which the Word document(s) were added.
- Click Job Options.
- Select the Job Option you’ll use to publish the extracted sections.
- Click Edit.
- Move the Sections you want to publish from ‘Available Sections’ to ‘Used Sections’.
- Click Save, to update the Job Option with the content.

You are now ready to publish the job to Typefi Publish.

Run Job

- Click Job Options.
- Select the Job Option to which you previously added the content.
- Click Run Job.

The Typefi Publish Server window automatically jumps to the Jobs Monitor for the selected Job Option. Here you can monitor the page-composition progress. When the Job is completed you can access the published components.

Job Monitor

- Click the completed job link in the Job Monitor for the job you've just published to display the published files.

Typefi Publish creates the InDesign file, a log file, a .XML file and (usually) a PDF file.

No PDF file? If you don't see a PDF file after the page-composition has been completed, then check that the Create PDF option is enabled for the Job Options you've used to publish the job.

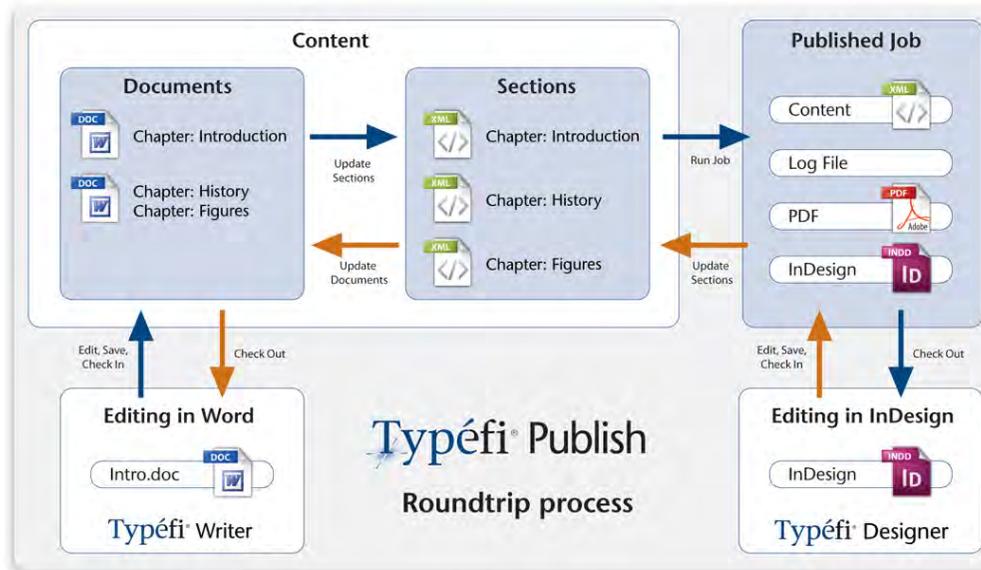
Viewing the PDF file

To view the PDF file that was created as part of a published job:

- Access it from the Job Monitor
- Check out the PDF

Roundtripping

'Roundtripping' involves the process of publishing your Word content through Typefi Publish; making changes in produced InDesign files; and transferring these changes back into the Word content file.



Roundtrip process diagram

One of the requirements for roundtripping is that the Word documents you work with must be stored on the Typefi Publish Server and their sections extracted. (If you don't have access to the server, you can disregard this topic.)

Step-by-step Roundtrip process

The diagram above gives a full process overview on how Roundtripping works. These are the steps involved:

Step 1: Editing Content in Word

Check out a Word document that has been added to a Typefi project, and make all of the required changes to the document.

Step 2: Save, Close, Check In

When you're finished editing the document, save the file, close the file and check the file back into Content/Documents.

Step 3: Update Sections

In order to publish the content from the checked in Document, select it in the Document repository and click Update Sections. The section data is now extracted and visible in the Document / Sections repository.

Step 4: Add content to Job Option

Edit a Job Option that is going to be used and ensure the extracted content is added as part of a Job Option's content. Next publish the job.

Step 5: Editing in InDesign

Locate the Published job in the Job Monitor and check out the InDesign file. Make changes in the InDesign file, and ensure you retain the Typefi content of the document.

Step 6: Save, Close, Check In

When finished with the edits in InDesign, save the file, close it and check it back in.

Step 7: Update Sections

Now it's time to extract an updated content version from the InDesign document and replace the old content in the Content/Sections repository. Select the InDesign File and click Update Sections.

Step 8: Updating the Word document (full circle)

Time for the roundtrip stage. In Content/Documents, select the Word document you edited originally and click Update. Leave the Selected Sections as they are, leave 'Use Copies of Selected Sections' disabled and click Update. The Word document has now been updated.

Step 9: Roundtrip complete

To verify that the roundtrip has been successfully completed, check out the Word document.

Glossary

Anchors

Markers that indicate where an element is referenced in the content. The relationship between element and its anchor within the content is defined by the element's layout rules. The Anchor consists of an Anchor Marker and an Anchor Line. The Anchor Marker is the circular mark linked to the Element. The Anchor Line is the line that connects the Marker to its reference point in the text

Anchor Line

(see [Anchors](#))

Anchor Marker

(see [Anchors](#))

Bookmarks

Expandable panel to the left of a PDF page that contains a series of structured links, normally derived from headings. These links provide quick access to related PDF pages and are viewable with the free Adobe Reader.

Character Styles

See [Styles](#)

Conditions

Qualifications used to mark up specific parts of content for inclusion or exclusion when a job is published.

Conversion process

Process of transferring Microsoft Word data from original data format to Typefi Writer enabled format.

Cross-Reference

A textual references within a publication that directs the reader from a source point in the text to a destination located elsewhere in the same publication.

Designer Scripts

InDesign Scripts that are installed in the InDesign CS3 Server/Scripts folder, developed in JavaScript (Mac or PC compatible), AppleScript (Mac) or VB Script (Windows).

Field Value

The data that populates a Project, Section or Element Fields during page composition.

Filler

A page that is inserted at the end of a section to ensure the following section can start on a required left or right hand page.

Fixed Element

Typefi Elements for which each instance appears in a predefined context and location.

Floating Element

Individually placed and designed objects or groups that are placed separate to the main content thread, and positioned on the page according to predefined layout rules and priorities.

Footers

Footers consist of text information placed at the bottom of the page. This text repeats itself across pages of the full project or document section (see also Typefi Section). Footers can include text such as division title, version number, page number etc.

Footnotes

Notes located at the bottom of document pages. They are used to add some additional information about something referred to in the main text and are generally numbered in-text and then referenced by that number at the bottom of the page.

Headers

Headers are generally descriptive information about a document section (see Typefi Section), placed at the top of the page. Header information repeats itself across pages of the full project or document section. For example a chapter title might replicate itself across the pages of a chapter.

Inline Element

Individually placed and designed objects or groups that compare with InDesign's inline or anchored objects. They are inserted into the main story text flow during page composition.

Inline Images

Images inserted at the cursor position inside a paragraph that behave as an individual character does.

Job Monitor

Lists all failed Typefi Publish jobs, jobs in progress, pending jobs, jobs that were round-tripped and completed jobs.

Job Scripts

Server based scripts that are installed in the script folder inside the Typefi/Publish/Server folder. Job Scripts are invoked by the Typefi Publish Server either before a job is run, or on completion of the job.

Paragraph Styles

See [Styles](#)

PDF Export Presets

Typefi Engine Type's reference to PDF Settings files (.joboptions) installed on InDesign Server

Prefix

A label that precedes the automatic page numbering in InDesign

Project Field

Field that carries the same value throughout a publishing project, for example a publication title.

Rendering

Process of generating InDesign and PDF output by means of automated pagination using the Typefi Publish system.

Script

A set of instructions written in a programming language such as JavaScript, that can be run at various times during automated pagination and provide additional client-specific customisation requirements.

Section Field

Fields that carries the same value throughout a section. For example a Chapter Title is unique to its own chapter.

Styles

Styles apply various text formatting attributes to text. Paragraph styles defines all character and paragraph specific text formatting attributes. Character styles define character specific attributes and are generally applied after paragraph style application. An example of a Character style would be application of “bold” or “italics”. Table Styles define formatting attributes for tables.

Template

An InDesign document that has been prepared by a production artist for automatic page composition using the Typefi Designer plug-ins.

Typefi Borders

The visual appearance of Typefi Frames and Element Prototypes and Instances

Typefi Designer

Plug-ins for Adobe InDesign that enable production artists to develop intelligent layouts, without sacrificing professional design quality or requiring complex coding. By embedding layout rules and dynamic elements directly into InDesign templates, designs can be rapidly prototyped and adjusted to accommodate highly variable content.

Typefi Engine

Typefi Engine brings high volume throughput and fast processing to high-quality, dynamic page composition using Adobe InDesign Server. The Engine uses both rules-based and template-driven page composition.

Typefi Elements

Typefi Elements are dynamic building blocks consisting of text and graphic components that are automatically placed, resized and positioned during automated pagination. Elements are designed once and reused many times with varying data throughout pagination process.

Variant

A variation of a Floating Element. A variant has its own set of layout rules that control variant selection and placement during page composition and inclusion of additional data.

Typefi Fields

Typefi Fields are content place holders that can be included at Project, Section or Element level. Project level fields are automatically populated through pagination, Section fields are consistent throughout a individual Typefi Section, Element fields are specific to the element occurrences throughout the paginated documents.

Typefi FileManager

A small Java-based helper application that facilitates all file transfers to and from the Typefi Publish Server. It further monitors publishing jobs initiated from Microsoft Word. Without this application no communication between user workstations (client) and Typefi Publish Server takes place.

Typefi Job Options

Typefi Job Options define which extracted Typefi sections, conditions, templates scripts etc. and must be applied during the composition process.

Typefi Publish Server

Web-based interface that makes it easy to setup publishing projects, manage project content and monitor the Typefi Publish workflow. From the server projects and their assets (templates, content, images, job options, jobs) can be defined, accessed or monitored throughout the publishing cycle.

Typefi project

The whole of a publication, from content to template to finished artwork. Typefi projects are setup from the Typefi Server and provide access to related project templates, content, images, job options and jobs

Typefi Publish

Typefi's professional platform developed for design-driven automated publishing. Built on industry standard tools and technologies, Typefi Publish delivers a scalable solution for authoring and publishing more efficiently and cost effectively, without sacrificing design or typographic quality

Typefi Sections

Sections are distinct parts of a publication e.g. Table of Contents, Front Cover, Chapter, Division, Part. Typefi Sections control which page design sequence is used during the automated pagination process as content is flowed into pages. For instance a first page of a new Chapter might have a different design from following pages.

Typefi Template

Adobe InDesign template prepared with Typefi Designer. This template provides all the dynamic building blocks required for automated pagination and defines how XML is generated for content run-in.

Typefi Writer

Add-in for Microsoft Word that makes the mark-up of Word documents for use with Typefi Publish a simple process. A Typefi menu and Typefi tools are added to the familiar Word interface that enable an on-the-fly conversion from Word to XML as editorial content is checked back into the server-based repository by an author or published to Typefi Publish directly from Word.

XML

Extensible Markup Language..