

Typefi® Publish 6

Designer User Guide

November 2013



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Testing your Template

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. This guide is aimed at those who want to develop a Typefi template—either from an existing InDesign document, or starting with a blank document. You are the *production designer*.

Production designers use typical InDesign-type panels and techniques to add automation 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 Typefi Publish 6 - Server User Guide*). The template is then specified within one or more Job Options (see *'Job Options' in Typefi Publish 6 - Server User Guide*) so that content can be published.

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

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 synchronised 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. Each of the panels plays an important part in using Typefi Designer and is used to create dynamic InDesign templates for automated page composition using Typefi Publish. It also installs additional choices inside the InDesign dialogs that edit paragraph, character and table styles. The four Typefi panels in InDesign are:

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

Typefi Panels

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 page 16)

Typefi Fields

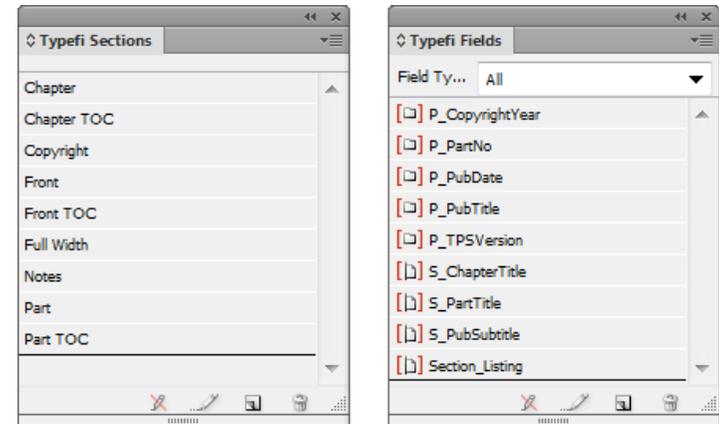
Fields are text placeholders that automatically update if the author changes the definition. (See "[Typefi Fields](#)" on page 36)

Typefi Elements

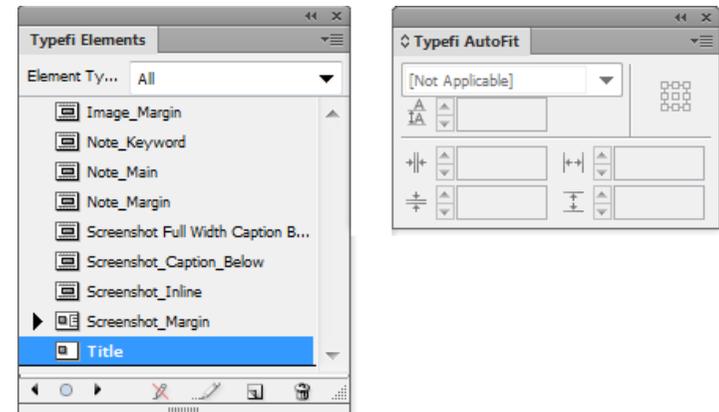
There are three types of elements: Fixed, Inline and Floating Elements. They can be formed from a single frame, or a group of frames, and can also include line or shape objects. In addition, Elements can contain Element Content or Image frames as well as Fields. (See "[Elements](#)" on page 10)

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 page 11)



The Typefi Sections panel and the Typefi Fields panel



The Typefi Elements panel and the Typefi AutoFit panel

Preparing InDesign Templates

When you develop InDesign templates to be used for publishing with Typefi Publish, you must prepare and plan carefully.

Good template design requires you use InDesign best practices such as multiple master pages; hierarchical 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 formatting, table formatting, and object-level formatting. Design elements are defined as *Typefi Elements* - which 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. A good place to start is analysis of the design...

Analysis of 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, colours and fonts.

Four important components form the structure of a template:

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

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

Paragraph, Character, and Table styles are also integral to the process. We will focus on these in-depth in this user guide.

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 file. 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 required for the design-driven composition Typefi Publish offers.

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

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

Master Pages

Before beginning work on the master pages for your template, consider the following: Does your design contain different parts? If so, what are these parts? These parts would probably become InDesign Sections as you are creating the document.

InDesign Master pages are created to be used in Typefi Sections and then Typefi Publish automatically creates an InDesign section for each Typefi Section used.

When looking at the example used here you might notice some of the following design decisions:

- 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

In the example used:

- A Chapter always starts on a right-hand page, and contains the chapter title, chapter number, and an image
- The next page contains a full-page photo



Sample publication

- The content text that follows after a chapter start always commences on a right page and has its own master applied to it
- The continued-content text 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:

- Chapters start on right pages
- Next left page is a picture page
- Next right page is a Learning Objectives page
- Next left page continues Learning Objectives if needed
- Next right page is where the Chapter text starts

Typofi Sections

Typofi Sections control how InDesign document sections (such as Chapters) are constructed and populated with content. They specify which InDesign Master pages they require during the composition process and in which order the master pages are used.

Sections also specify the pagination settings—such as the style of the page numbering—and whether the section numbering starts at 1 again, or continues from the previous section. They may also contain **Section Fields** (see ["Section Type" on page 18](#))

Within the Section dialog, the Section fields can be activated (e.g. **Chapter Title**) so the author is prompted to fill them with data.

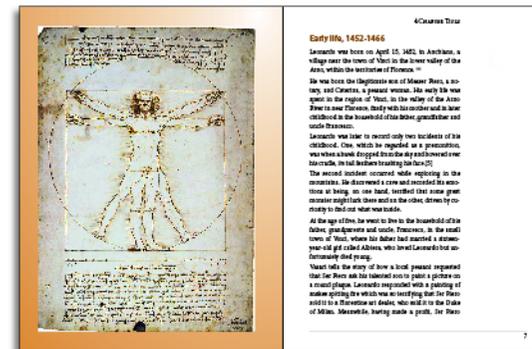
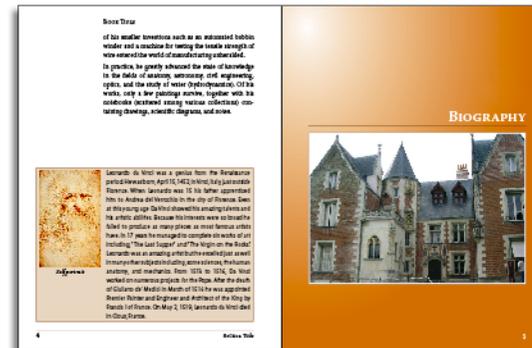
Layers

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 should 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 or watermarks
- A **Running Headers** or **Footers** Layer (if it is important that these items retain their order in the ‘stack’)

For Typofi content you could consider using:

- A **Main Content** layer that is used for the run-in of the core body content
- An **Elements** layer in which Typofi Floating and Fixed Elements are placed



Review a sample of the required output and decide layout of chapter start pages. In this instance, chapters start on a right-hand page, followed by a graphic, and then the text starts on the next right-hand page.

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 can be locked, which is a great way of isolating content types and makes it easier for you to select and edit content.

Styles

InDesign contains several different style-formatting tools, each used to provide consistent 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 content text provided by the author is formatted through use of paragraph and character styles in Word or XML.

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 (meaning you can control which style follows each paragraph style in the content document creation, although editors can over-ride this) as well as the *nested style* feature available in InDesign (which controls font and formatting changes **within** a paragraph).

When naming either Paragraph or Character Styles:

- ensure the style name used is unique
- do not use leading or trailing spaces in style names
- do not use bullet characters or numbers only.

Tip: When defining character styles you should create styles that apply minimal formatting, such as font colour, all-caps, bold, italic, superscript or subscript—but leave font and size unspecified unless necessary.

Avoid Word default 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 can cause unnecessary warnings within the job log due to the mismatch between XML (which is case-sensitive) and Word (which is not). To use a similar naming convention you could remove the space in these style names or add a prefix (e.g. A_Heading_1). The other problem with the built-in Word style names is that they change depending on the language version of Word (e.g. *Titulo Uno* instead of *Heading 1*).

When defining a paragraph style, you can specify the style that will follow it automatically if typing. This is referred to as the *Next Style*. Word allows the same specification, and will recognise it when the Typefi styles are imported (e.g. *Bullet First* to be followed by *Bullets*).

If a paragraph needs varied character formatting, *Nested Styles* can be created to apply character styles automatically within the paragraph (e.g. the first word in the paragraph to be formatted as *Bold*). Word does not support this feature, so you will only see the result in the output PDF after running a print job.

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 effect on 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.

Image Height and Leading

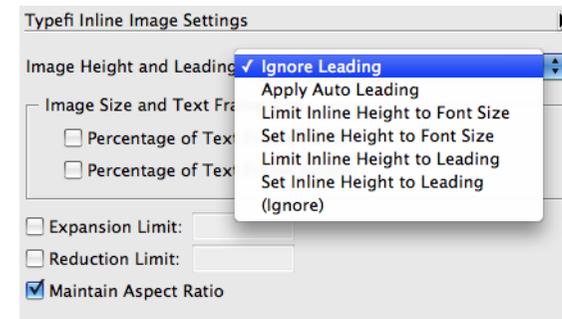
The *Ignore Leading* option retains the original leading for the line in which the Inline image is placed. If the Inline image height exceeds the leading height, the top of the graphic will overlap and obscure the text in preceding lines.

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 10mm high, the leading will be set to 12mm.

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

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.



Typefi Inline Image Settings are part of the paragraph style definition

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.¹



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.²

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

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

(Original image size at left). 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 at left). Image Height and Leading set to Set Inline Height to Font Size

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 and visible pixilation.

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 Images 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.

A character style may only be applied to the inline graphic after it is inserted using the Typefi Writer.

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.

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

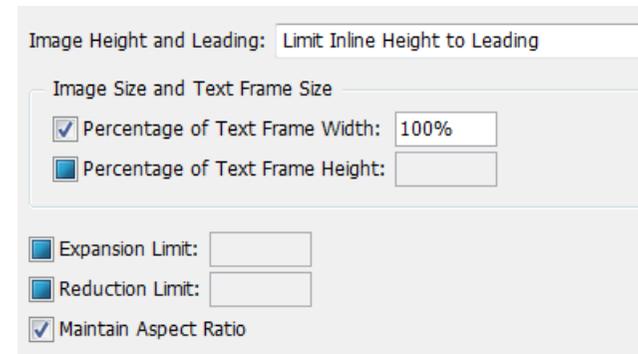
(Original image size at left). Image Height and Leading set to **Limit Inline Height to Leading**

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

(Original image size at left). Image Height and Leading set to **Set Inline Height to Leading**

green purple red

Inline image with baseline shift applied through character style settings.



Setting the size of an inline image within a particular paragraph style

Export to TemplateXML

For Paragraph or Character Styles to be available to the author in Typefi Writer, you must enable the *Export to TemplateXML* option for the particular style in InDesign. For each Paragraph or Character style created that is **not** part of a *style group* (see "*Style Groups on page 9*"), the *Export to TemplateXML* option is **enabled** by default.

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 unless you choose to change it. Every 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 header, footer, and Table of Contents styles).

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

- Click the style name in the Paragraph or Character Styles list (or right-click on the name)
- Select *Export to TemplateXML* from the Paragraph or Character Styles panel menu (or choose from the pop-up menu if right-clicked – see screenshot)

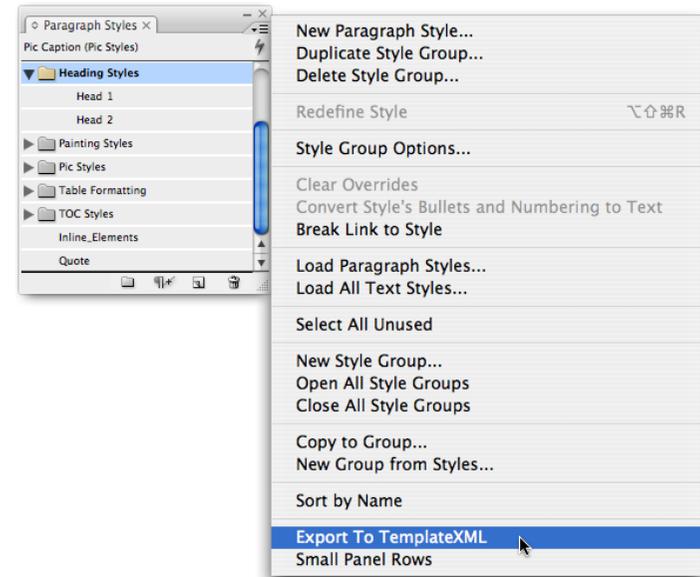
(Alternatively, select a Style Group containing a set of styles and enable or disable *Export to TemplateXML* for the entire Style Group).

Note: The *[Basic Paragraph]* paragraph style and the *[None]* character style are never exported to Template XML. The command is disabled for these styles. Also, if you import paragraph styles from another template, the 'Export to TemplateXML' setting reverts to OFF. You must enable it again for those styles you want to make available to the authors.

Style Groups

Style Groups are the InDesign way of organising organizing Paragraph or Character Styles into 'folders'. To create one, select the required styles, and choose *New Group from Styles* in the Styles panel menu. You can drag styles in and out of these folders.

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



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

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 by the following logic: the Typefi 6 engine does a breadth-first traversal (http://en.wikipedia.org/wiki/Breadth-first_search) of the paragraph style groups. The last match wins, while the export flag is ignored. This is different behaviour to V5.

Object styles

Object styles are useful for many reasons, most of them 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 of Element Image frames
- Formatting of Element Content frames

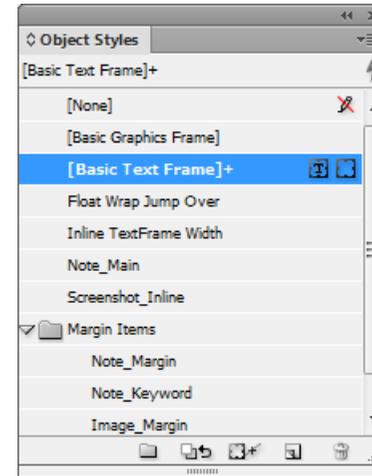
Appearance and the text content of the frame can be formatted using an object style. If the paragraph style referenced in the object style contains reference to a **next style** and this feature is enabled, then the paragraph following the first style is automatically formatted with the relevant paragraph style. (Probably better left to authors to choose relevant styles).

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, margin content such as sidebars, callouts, quotes and notes, and graphics that can be used to mark a break between topics (see "[Typefi Elements](#)" on page 45).

Table Styles

Use InDesign **Table Styles** and **Cell Styles** for formatting of tables in your design (see "[Creating Table Styles](#)" on page 66).



The InDesign Object Styles panel, with examples of a variety of styles that control behaviour of Typefi elements

Typefi AutoFit

The Typefi AutoFit panel and tool are used to define relationships between objects, frames and lines, enable automatic text frame resize behaviours, 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.

Features in Publish 6 include:

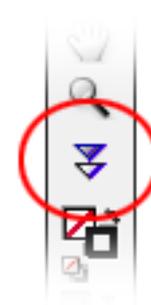
- AutoFit relationships, resize styles, and size limits are preserved when exporting to a snippet file, an object library or InDesign Interchange (INX) or InDesign Markup (IDML) files
- Corners are now supported as reference points for AutoFit relationships
- **Bi-directional** and **multi-parent** relationships 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. To create an AutoFit relationship between two objects:

- 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.

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



The Typefi AutoFit tool—added to the Tools panel



AutoFit Cursors: Parent (left) and Child (right). The cursor changes from Parent to Child after you click an anchor point of an object.

(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 behaviours, depending on which reference point of the bounding box is selected for the child:

- **Centre** 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 centre 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** (avoiding the need for many extra relationships).

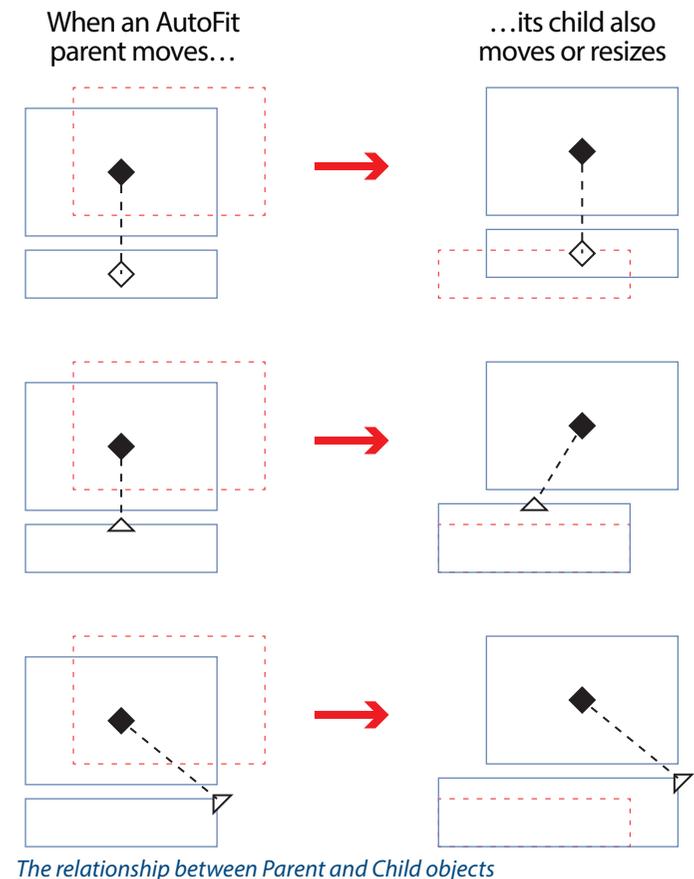
Changing a relationship

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 lower 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 (icons at the left of the entry fields) to copy the measurements of a selected object. When multiple objects are selected, AutoFit copies and applies the measurements of each object as unique (to each object) limits. This saves you having to repeat the process for each object.

Removing object size limits

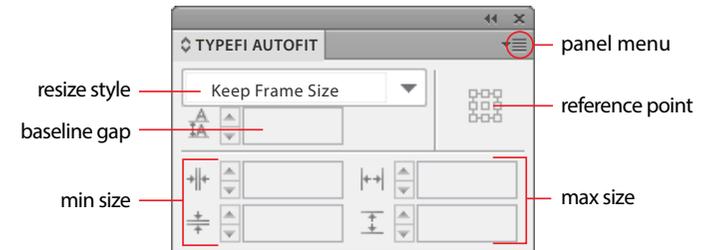
To remove a limit, delete the entered value or enter 0. To remove all limits from a selected object (including any AutoFit resize styles), choose **Remove Attributes** from the AutoFit panel menu.

Reference Point

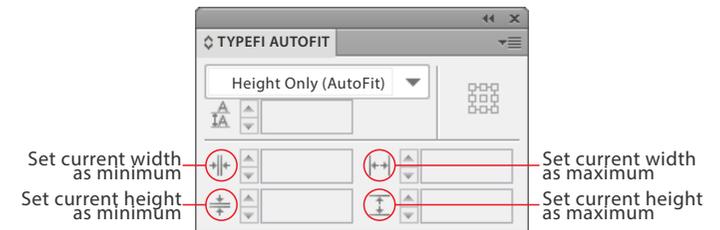
The reference point setting icon is the little matrix of white boxes to the right of the **Resize Style** drop-down (see [screenshot](#)). It is very similar in purpose and behaviour to the similar one at the far left of the InDesign Control panel (in object mode). Selecting one of the nine reference points establishes the point about which any resizing will take place. The selected reference point changes to a black box. The equivalent point on the selected object(s) will remain fixed in the same position while resizing takes place.

If a caption sits above an image, for instance, the text frame needs to grow upwards and perhaps to the right. In that case, the lower-left reference point would be selected before choosing the **Resize Style**.

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



The various sections of the Typefi AutoFit panel – here set to the default of no automatic resizing



The various buttons that set the minimum and maximum widths and heights to an existing object's current size—only click those you want to lock

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.

There are six types of AutoFit resize styles:

Keep Frame Size (default) does nothing and is equivalent to a normal InDesign text frame (Use this option to turn off automatic resizing)

Height Only (AutoFit) (meaning 'resize height only') modifies a text frame so that it changes size depending on the amount of text it holds. You can choose which reference point remains fixed (see ["Reference Point" on page 13](#)), but the frame will only grow vertically.

(Note: This choice is only present to accommodate legacy documents, and should not be used for new templates. Instead, use the following 'Height Only' choice.)

Height Only is the same as the InDesign Auto-Fit setting, and should be used for all new templates

Width Only is the same as the InDesign Auto-Fit setting

Height and Width is the same as the InDesign Auto-Fit setting

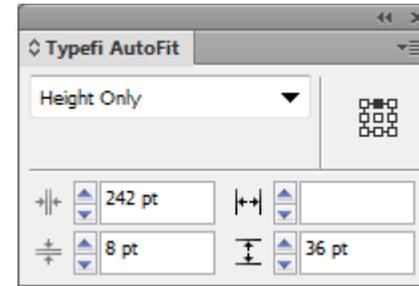
Height and Width (Keep Proportions) evenly distributes the height of the text frame above and below the centre point while fitting all text in the frame.

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.

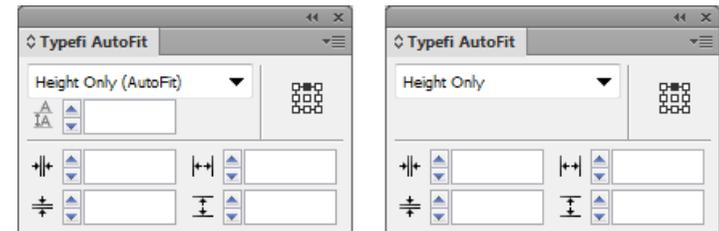
Removing resize styles

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).

** AutoFit uses the native 'Balance Columns' feature in InDesign CS6, which is controlled by Object > Text Frame Options > Balance Columns.



The AutoFit panel – here set to resize from the top down, with a minimum height (8pt) and width (242pt) plus a maximum height (36pt)



Two versions of the AutoFit panel, including the deprecated 'Height Only (AutoFit)', which then reveals the 'Maximum Vertical Gap' setting, now also deprecated.

Vertical gap

The vertical gap setting provides additional padding, up to the value specified, between the top or bottom (or both) of the frame depending on its Vertical Justification options. This is only editable if “Height Only (AutoFit)” is selected, and **it is now deprecated**. (This is better done using the InDesign Text Frame options).

Publish 6 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.

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 *"Typefi Fields" on page 36*).

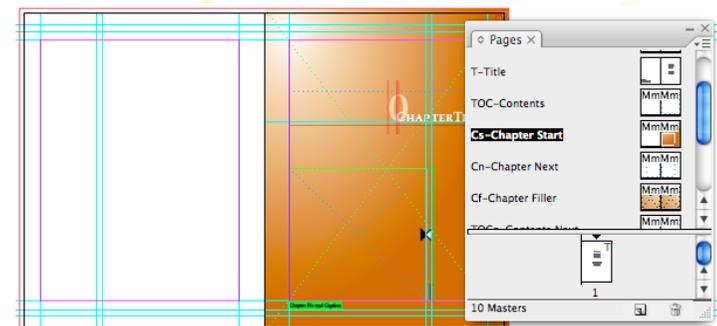
Designing a Section

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" on page 45*) for the graphic, and two Section Fields (see *"Section Name" on page 18*) are inserted for the Chapter Title and Number.



Cs – Chapter Start master pages

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.

The header on the left master page contains a Project Field (BookTitle) (see "**Typefi Fields**" on page 36). 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.

Before defining a new Typefi section ensure that:

- All relevant Master Pages required for the creation of a Typefi Section have been created, including 'filler' masters
- Masters used in a Main Story Section (not TOC or Index) contain a **Main Story** frame (see page 25)
- Masters used in a Table of Contents Section contain a **Table of Contents** frame
- Masters used in an Index contain an **Index** frame
- Fixed Elements are placed only on Master Pages that are used once per Section
- 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:

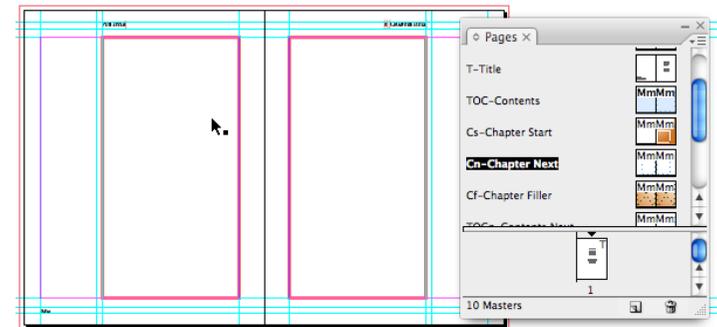
- Select **New Typefi Section...** from the Typefi Sections panel menu (**Window > Typefi**)

(Alternatively, click the **New Section** icon at the bottom of the panel).

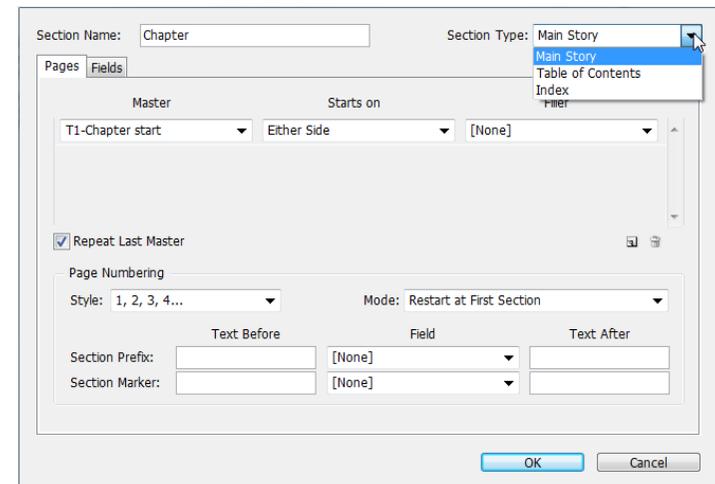
The Typefi Section Options dialog box is displayed.

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

- Next enter the **Section Name** (see "**Section Name**" on page 18)
- Set the **Section Type** (see "**Section Type**" on page 18)
- Set the **Pages** settings
- Enable or Disable **Repeat Last Master** option
- Set the **Page Numbering** settings
- Then click **Fields** and choose the Field settings



Cn-Chapter Next.



Typefi Section Type and the Add Master button (both circled)

- 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 *"Projects" in Typefi Publish 6 - Server User Guide*).

Section Type

There are three Section Types, *Main Story*, *Table of Contents*, and *Index*.

- *Main Story* 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
- *Index* sections are used to hold an automatically-generated index

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 Main Story section contains the main body of the content; a Table of Contents section contains the text that is generated for the Table of Contents; and an Index contains the automatically-generated index entries and their page numbers. Typefi continues to add pages during page composition until the content type that has precedence has all been formatted and placed (usually the Main Story).

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*, *Table of Contents*, or *Index* text frames. The main body of content fills Main Story frames; the Table of Contents text fills Table of Contents frames; and the Index entries fill the Index frames (see *"Typefi Frame types" on page 25*). 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 Main Story 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 will not continue.

Main Story section and Table of Contents frames

The first Master used by a Main Story 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

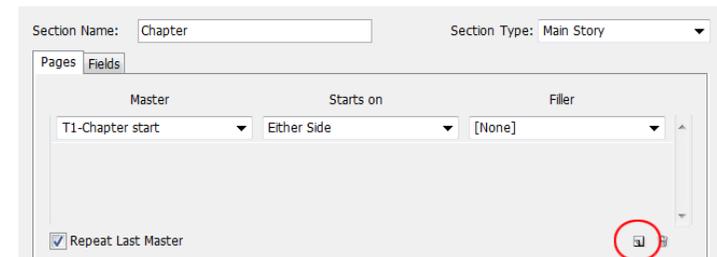
The next part of the Section Options dialog sets the order in which Master pages are used and repeated as content is flowed into the document.

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.

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.

Using short section-based TOCs requires publishing to a Book rather than a Single Document (*see Typefi Publish 6 - Server User Guide*).



Adding more Master Pages to the initial Master page that appears by default

To assign Master Page(s) to a section:

- Select the *Master* to be used
- Set the *Starts On* preferences (see "*Starts On*" on page 20)
- Set the *Filler* preference (see "*Filler Master*" on page 21).

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

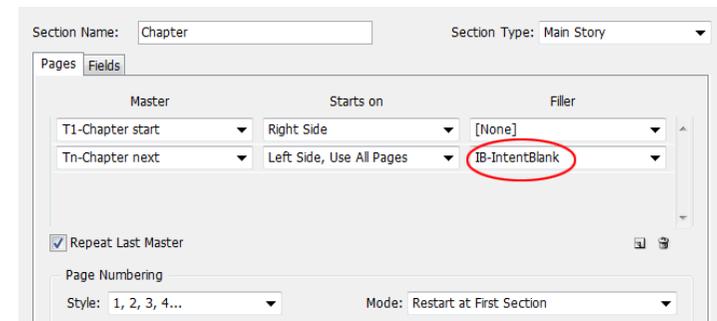
- Click the **Add Master** button
- Then set the *Master* page, *Starts On* and *Filler* settings
- Continue to click **Add Master**, until you've added all necessary master pages.

For instance, for a Chapter section of a publication you might set the Pages settings to use a number of master pages, including a Filler page to complete a chapter with a verso page before the next chapter starts on a recto page.

STARTS ON

Starts On determines whether the first page of a section starts on left or right side, or either side, and whether or not all pages in the master spread are used. 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.
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.



Chapter Section set to use three different master pages during page composition, one being a Filler

'Starts On' option	Description
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 "**Section Type vs. Typefi Frame Type**" on page 18).

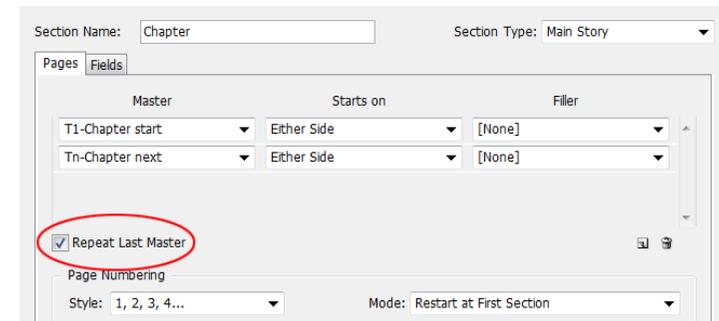
Page Numbering

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**.

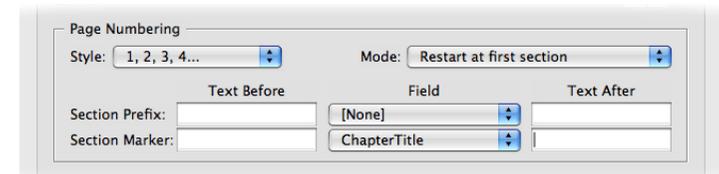
Style

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, select the preferred numbering style from the **Style** drop-down.



Repeat Last Master enabled—Tn-Chapter next will repeat as needed in this example



Page Numbering settings in Section Options dialog.



Section Page Numbering Style and Mode choices

Mode

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

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

Restart at First Section means that page numbering is reset to '1' for the **first** occurrence in the publication of the defined section. Any sections following this section continue their numbering sequentially, **including any other 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.

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.

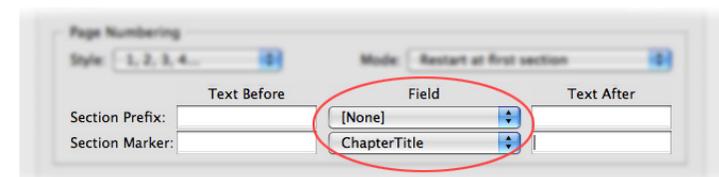
- All of the Prefix data precedes the placement of the page-numbers
- **Text Before and Text After** allows for the inclusion of literal text strings (any text you want)
- Field data is sourced from either a Section or a Project Field value
- During page composition in InDesign the Prefix data is inserted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

Section Marker

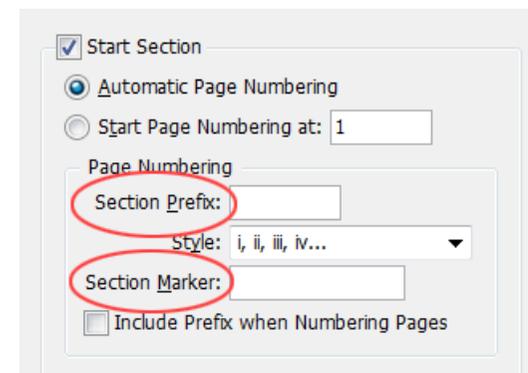
When a Section Marker has been included in a Text Frame on a Master Page (**Type menu > Insert Special Characters > Markers**) the Section Marker value added will appear in its place on the document pages.

- All of the Marker data entered populates the Section Marker value in InDesign's **Numbering & Section Options** during page composition (see [screenshot](#))
- **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

Typefi Sections



Choosing Section Markers for page numbering within a section—**ChapterTitle** will precede the page number in this example



InDesign **Numbering & Section Options**, where the Typefi **Section Prefix and Marker** will be placed as data

- 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 after being set by the InDesign Section Options. When you're looking at using a changeable prefix or section marker in your designs, consider using a Typefi 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](#)" on page 36).

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 at the bottom of the dialog
- 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.

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. Project Fields are useful in Jobs run on the server, as they can be used to label the particular Job.

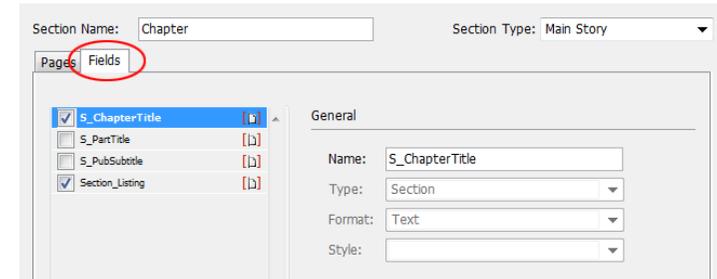
DELETING A SECTION FIELD

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 [page 43](#).

To delete a field:

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



Assigning Section fields to a Section



Deleting a selected field using the Rubbish Bin icon in the Fields panel

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.

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

You may find you no longer require a particular Typefi Section, and would like to remove it from the template...

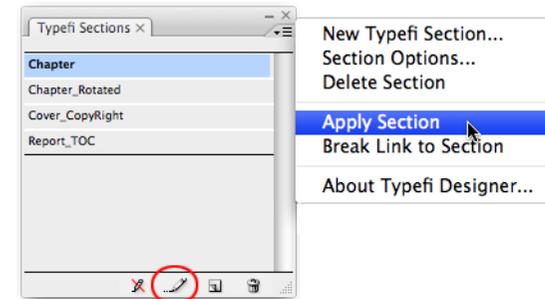
To delete a Section from the Typefi Section Panel:

- Show the **Typefi Sections** panel (**Window > Typefi** menu)
- Select the Section to be removed
- Choose **Delete Section** from the panel menu

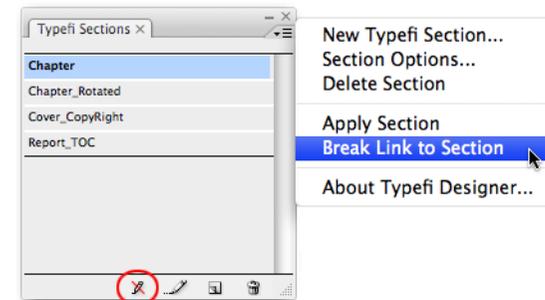
(Alternatively, click the **Delete Section** icon at the bottom of the panel).

- Click **OK** to delete the Section.

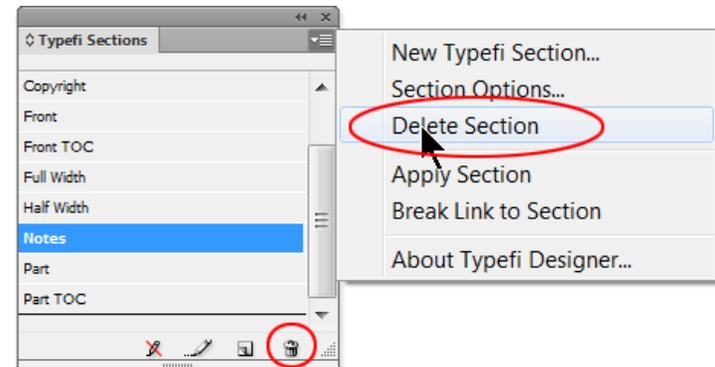
The Section will no longer be listed in the Typefi Sections panel and Applied Section references are removed from the document.



Apply Section command and button



Break Link to Section.



The Delete Section command and icon in the Sections panel

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 with additional attributes that allow them to receive content dynamically during page-composition.

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.

Typefi Frame types

There are five types of Typefi Frames:

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

To help distinguish Typefi Frames from InDesign frames, the borders of the frames are coloured by default with a 2.5 pt stroke (see "[Typefi Borders](#)" on page 88).

Frame Type	Border Colour
Main Story	Red
Table of Contents	Dark Blue
Index	Violet
Element Content	Cyan
Element Image	Yellow

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 colours and thickness can be altered by editing the Typefi Border preferences.

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 **Main Story Section** (see "**Section Type**" on page 18).

An exception applies if a **Table of Contents (TOC) section** 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:

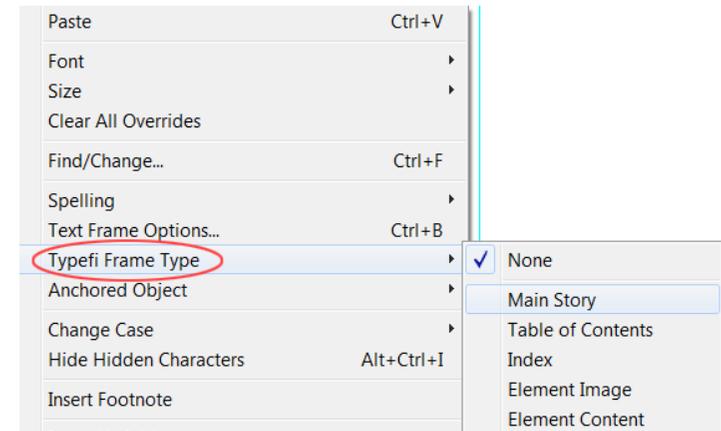
- Open the Master page and insert a normal InDesign Text Frame on the left and right master
- Select the Text Frame with the selection tool
- Choose **Typefi Frame Type > Main Story** from the **Object** menu (or right-click the frame and choose it from the context menu)
- Click **OK**.

(Alternatively, right-click the frame and select **Typefi Frame Type > Main Story** from the contextual menu that displays).

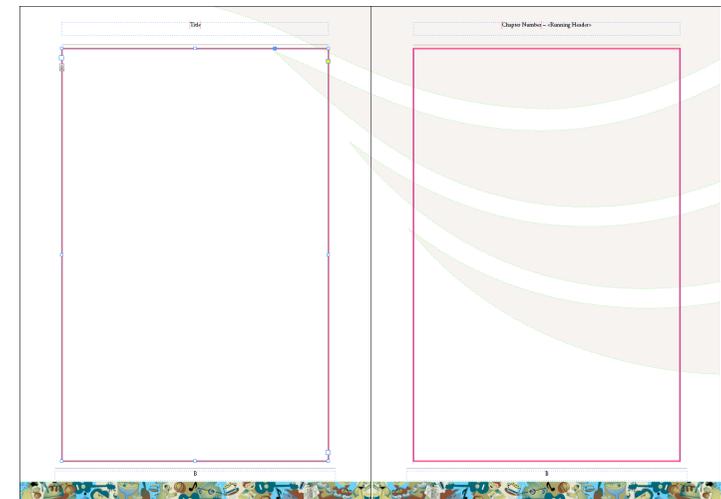
The **Main Story Frame** property has now been applied and identified by its thick red frame edge.

First Paragraph Style (Deprecated)

The choice of First Paragraph Style (for users of previous versions) no longer exists. It's only available for legacy (converted) documents and then only on frames where the setting was previously set to anything other than [None]. As soon as you change the **First Paragraph Style Override** of a Main Story or Element Text frame to [None] in a Typefi 6 document, the UI to set the First Paragraph Style Override for that frame is hidden (it can be restored via the Designer scripting interface).



Right-click on a frame to bring up the Typefi Frame Type choices (or use the Object menu)



Main Story frame property applied to text frames on Left and Right master pages.

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 *Job Options in the Typefi Publish Server Guide*).

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.

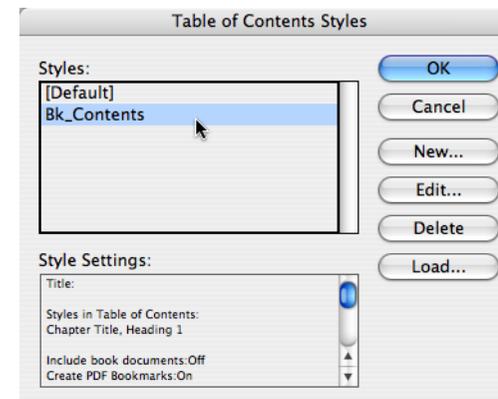
Start by creating one or more Table of Contents Styles as part of your InDesign template **prior** to assigning the Typefi Frame Type - Table of Contents to a Text Frame.

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.



A Table of Contents Style created for a specific Typefi project

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.

Tip: 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](#)" on page 18), 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 Main Story sections are paginated.

Note: Because TOC sections are created as the last step in the process, Typefi Publish forces the first Main Story 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).

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* property is applied and is recognisable by its thick dark blue frame border, and the name of the particular TOC style appears as a label in the lower-right corner (see [screenshot](#)).

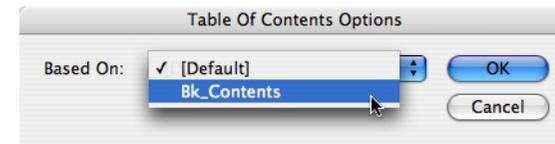
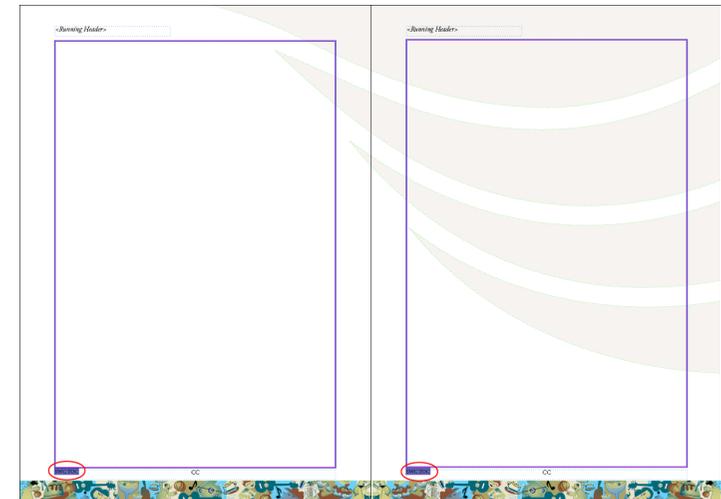


Table of Contents Options



Typefi Table of Contents frame property applied to text frame on TOC Contents master page (the TOC style name is circled)

About TOC frames

A TOC frame can also be included on a Main Story 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 Section (see [also "Section Type" on page 18](#)). 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 Main Story 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** output from the Job Options in the Server (see [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**.

Index

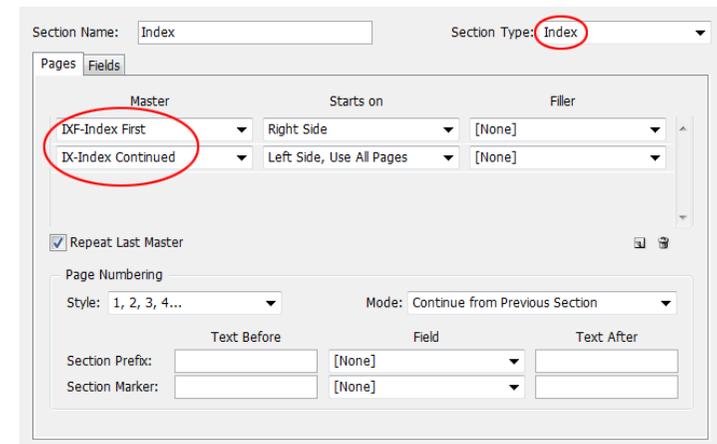
While some organisations prefer to create indexes manually after a document has been produced, it is easy to produce an automatic index with all the required features of a traditional index. Typefi Publish harnesses the power of the InDesign native indexing feature, and allows authors to use the standard Microsoft Word indexing feature.

Typefi Index Sections

A template needs to have a Typefi **Index Section** added to it that has its own master pages containing **Index Frames**. Index frames are the new Typefi Frame type now included in Typefi Publish 6.

Index Paragraph Styles

The index will be styled with the default InDesign Index styles, so it is necessary to create and modify those style definitions if you want the index to look different to the standard InDesign index. Those styles are named **Index Title**, **Index Section Head**, **Index Level 1**,



The new Typefi **Index** section type (drop-down menu circled to show the new choice) uses master pages with frame type set as 'Index'

Index Level 2, and so on (see [screenshot](#)). Depending on how many levels of ‘nesting’ are needed, more styles may be defined. (Word only offers nesting to one level in its indexing dialog.)

Generate Index

The index dialog allows the assignment of paragraph styles to the index. To access it:

- Open the **Index** panel – Window/Type & Tables/Index
- Choose **Generate Index** from the Index panel menu
- Click the **More Options** button under the **Cancel** button
- Accept the default settings or modify as necessary
- Click **OK**.

The index styles will be generated automatically when the job is run by the author.

The index dialog is a standard InDesign feature. For more information about indexing in InDesign, see <http://tinyurl.com/indesign-indexing>

More levels of nesting within the index are available in InDesign than are offered in Word. Therefore, you only need to create the following paragraph styles:

- **Index Title** – the main title: ‘Index’ (which could be set to span columns, for instance)
- **Index Section Head** – the letters in alphabetical order that form headings for the index entries
- **Index Level 1** – the basic index entries followed by page numbers
- **Index Level 2** – the ‘nested’ index entries that appear under a topic heading

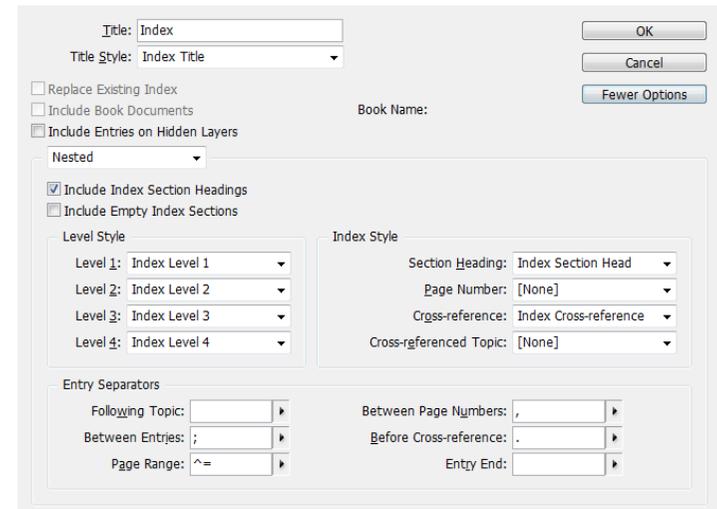
Another modification you may need to make is to the **default sort order**. The standard sort order places symbols before Roman text characters, followed by numbers, etc. (see [screenshot](#)). You can also choose to include or not include certain categories.

Creating an Index frame

To create an Index frame:

- Open the Master page and insert a normal InDesign text frame
- Select the Text Frame with the selection tool
- Choose **Typefi Frame Type > Index** from the **Object** menu.

(Alternatively, right-click the frame and select **Typefi Frame Type > Index** from the contextual menu that displays).



The InDesign Index dialog (expanded to show all options)

Include	Priority	Script	Header Type
<input checked="" type="checkbox"/>	1	Symbol	
<input checked="" type="checkbox"/>	2	Roman	Basic Latin
<input type="checkbox"/>	3	Numbers	
<input type="checkbox"/>	4	Greek	

The default sort order of an InDesign index – click the up/down arrows to change the order

The ***Index Frame Type*** property has now been applied and identified by its thick violet frame edge. (You may want to choose a multi-column format—as seen in the screenshot—for the text frame using the standard InDesign ***Text Frame Options*** dialog, as most indexes use two- or three-column layouts.)

The Index Master can now be used to create a new Typefi Section called ***Index*** (or whatever is needed) that will use the master to create the index pages (see "***Designing a Section***" on page 16). As with the Table of Contents, you may need a second master for subsequent index pages. The author does all the indexing preparation using the standard Word indexing feature.

Element Image

Element Image frames are placeholder graphic frames used within Typefi Elements (see "***Element creation process***" on page 46) and provide a number of options to control the fitting and placement of images. For an Element Image frame to become active it must be part of an element and it must have an image linked to it from content.

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).

Creating an Element Image Frame

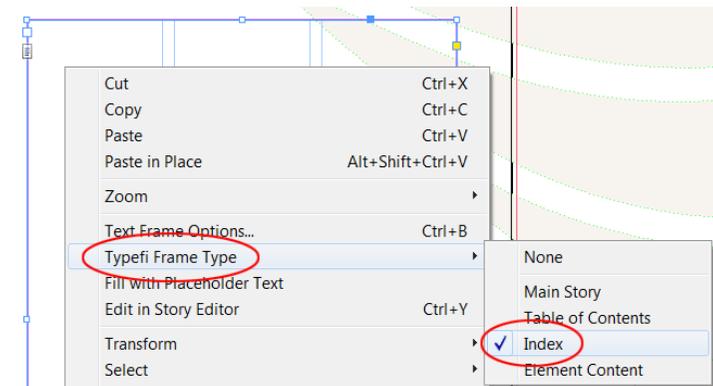
To create an Element Image frame:

- Select an InDesign graphic frame with the selection tool
- From the ***Object*** menu select ***Typefi Frame Type > Element Image***

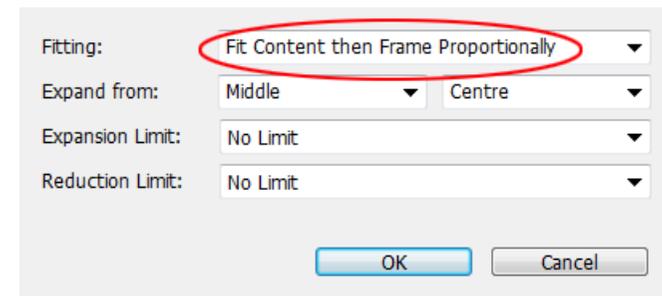
(Alternatively, right-click the frame and select ***Typefi Frame Type > Element Image***, or select ***Element Image*** from the ***Typefi Frame Type*** submenu in the ***Typefi Elements*** panel menu).

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

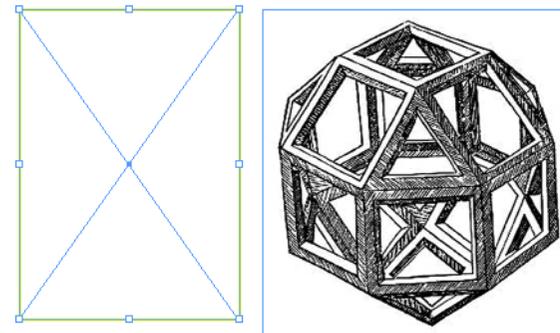
- Select the appropriate ***Fitting*** setting
- Set the ***Expand From*** option²²
- Set the ***Expansion*** and ***Reduction Limits***
- Click ***OK***.



Applying the new Typefi Index Frame Type to a text frame (formatted to be a three-column object)



Element Image Options, including a renamed ***Fitting*** option



Element Image Frame (left) and image to be placed within using Fitting options (right)

The *Element Image Frame* property has now been applied and is distinguished by its 2.5pt yellow frame border.

Element Image Options

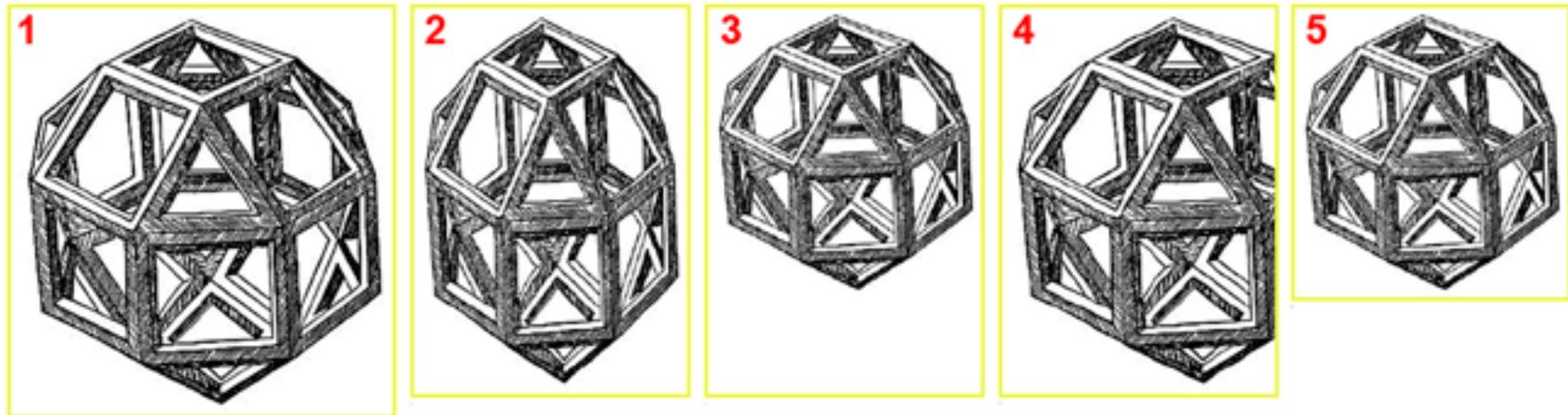
There are a number of *Element Image Options* to choose from, such as *Fitting*, *Expand From*, *Expansion Limit*, and *Reduction Limit*, all with many possible settings.

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.

Note: Frame resize behaviour may also be dependent on the inclusion of minimum or maximum frame width and height settings applied to the frame by AutoFit.

Here are the results of the image above being placed in the above image frame with different fitting settings (but all resizing from Top Left):



1: Fit Frame to Content 2: Fit Content to Frame 3: Fit Content Proportionally 4: Fill Frame Proportionally 5: Fit Content then Frame Proportionally

1) 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% (see [screenshot](#))

2) 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 proportions don't match the frame proportions the image is placed non-proportionally and may appear distorted.

3) 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.

(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.)

4) 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.

(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).

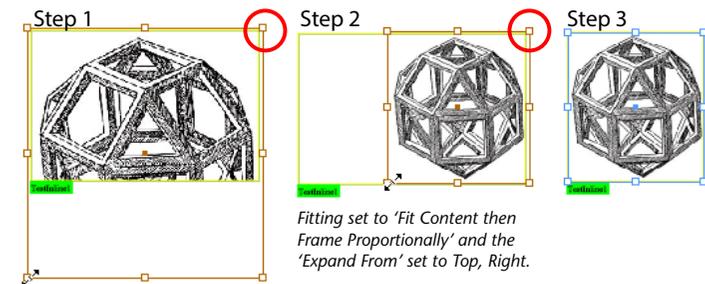
5) FIT CONTENT THEN FRAME PROPORTIONATELY

Fit Content then Frame Proportionally (newly-named for clarification) is a two-stage process. It starts by **proportionally** resizing the image to fit in the Element Image frame. **After** the image resizing, the frame size is adjusted to fit the content. (It is like using *Fit Content Proportionally* followed by *Fit Frame to Content*).

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 Top Right' example.

For example (see [screenshot](#)) when fitting is set to **Fit Content then Frame Proportionally**, setting Expand From to **Top | Right**, causes the Bottom | Left corner of the image to resize to fit in the frame while keeping correct proportions, and then the frame resizes to match the new graphic size.

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

Choosing **Top**, **Middle** or **Bottom** will cause horizontal resizing, and choosing **Left**, **Centre** or **Right** will cause vertical resizing.

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.

Element Content

Element Content frames are placeholder text frames used within Typefi Elements.

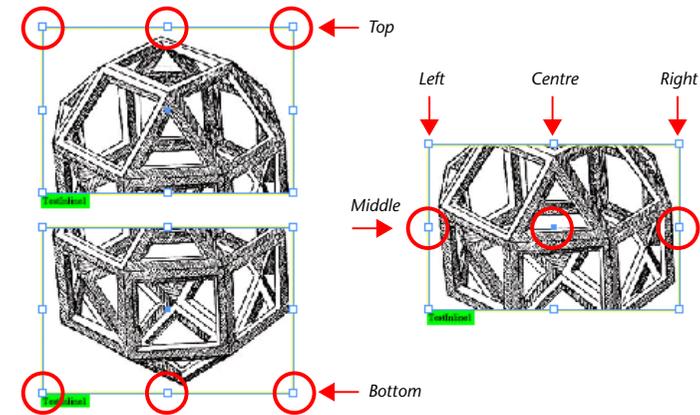
Note: Fields placed inside Element Content frames would be deleted during page-generation, and must therefore be placed inside normal InDesign Text Frames.

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 **Typefi Element** panel menu, **Typefi Frame Type** submenu).



'Expand From' settings.

To apply absolute height or width limits, for example 32mm 1.25 inch wide, use the Typefi AutoFit panel (see "[Minimum and maximum object size](#)" on [page 13](#)).

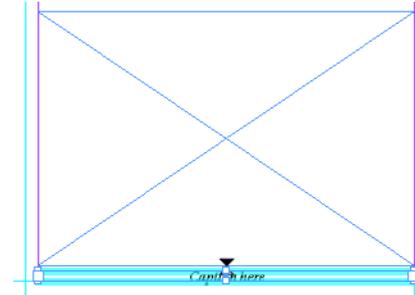
The Element Content Frame Type has now been applied and can be distinguished by its thicker cyan frame edge.

Clearing Typefi Frame Type

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 *Typefi Elements > Typefi Frames*).



The caption in this element is an Element Content Frame with default border colour colour(cyan) showing

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.

If you examine the title page design for the publication, several potential Project Fields can 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 (or click the New Field Definition icon at the bottom of the panel)

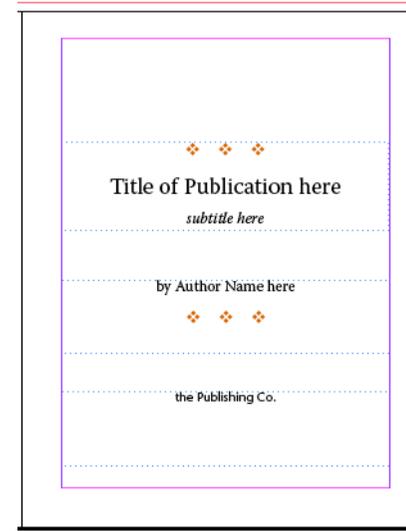
The **Field Options** dialog is displayed.

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

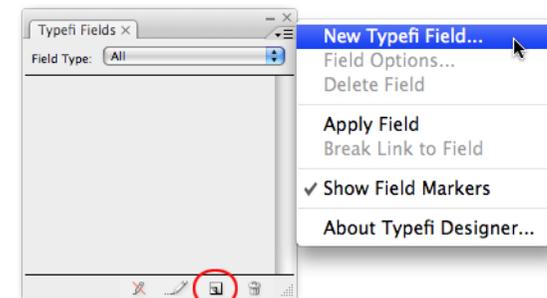
The Project Field is added to the Typefi Fields panel. In addition, any Project Fields that you add will appear as part of the **Project Settings** on the Typefi Server (see [the Typefi Systems Server Guide](#)).

Section Fields

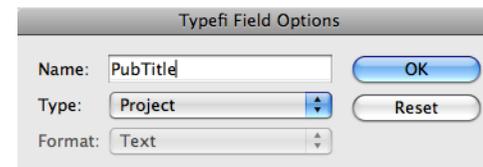
While Project Field values remain the same throughout a publication (unless they are manually changed at **Run Job** level), **Section Fields** only retain their value throughout a single Typefi Section (see ["Designing a Section" on page 16](#)).



An example of a Title page design for a specific project



Creating a new Typefi Field, with a choice of two ways



Field Options dialog allows you to choose the type of field

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. Neither the value (number), nor the format (Arabic, Roman, etc.) of the counter can be defined within the content by the Author/editor. 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 normal 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, allowing shuffling of sections without having to renumber.

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

- Chapter Number
- Chapter Title (section fields can no longer be used for cross-references though)

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).

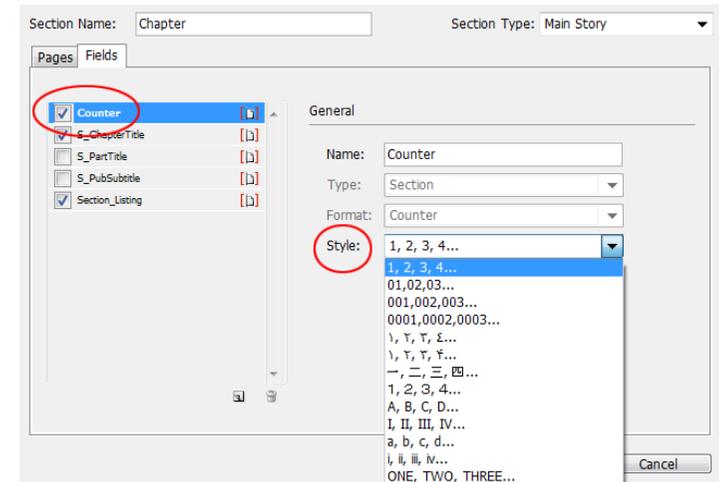
The Typefi Field Options dialog is displayed.

- Enter a unique **Name**.
- Set the **Type** to Section.
- Set the **Format** to either Text or Counter.
- Click **OK** to create the new Section Field.

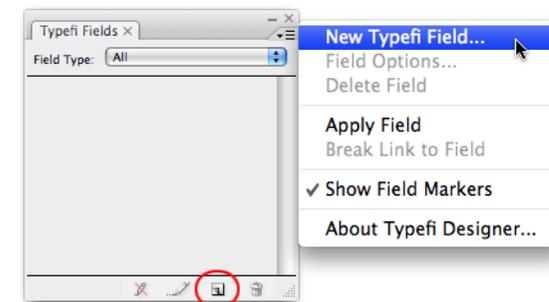
Field Format settings define the field’s data type. Section Fields have their **Format** set to either Text or as a Counter.

Text

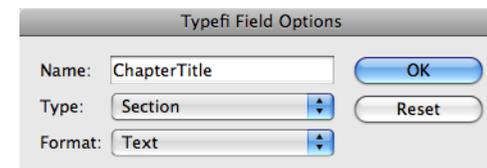
Fields with Format set to ‘Text’ are filled with text by authors when creating a Section.



Section Fields and the choice of type and style



Creating a new Field—either click the button or choose from the menu



Field Options: Section Field with Format set to Text.

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 "[Designing a Section](#)" on page 16).

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.

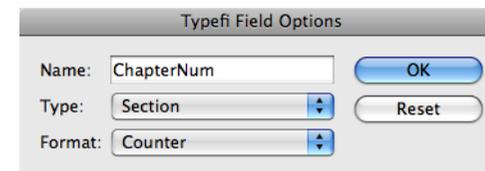
The new Section Field is added to the Typefi Fields panel.

Note: Section Fields can also be defined as part of the Typefi Section (see "[Typefi Sections](#)" on page 16).

Element Fields

An **Element Field** is a Field that is used within 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.



The image 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 showing "Section", and "Format:" with a dropdown menu showing "Counter". To the right of the "Name" field is a blue "OK" button. To the right of the "Type" and "Format" fields is a "Reset" button.

Setting Field Options for a Section Field with Format set to Counter.

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 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 when creating the Typefi Element (see ["Assigning Element Fields to an Element"](#) on page 52)

Applying Fields

Fields are always inserted in normal 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.

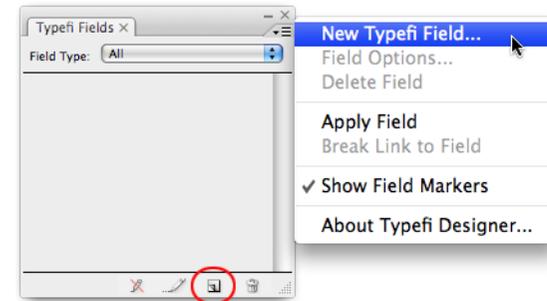
Apply Field with text highlight

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

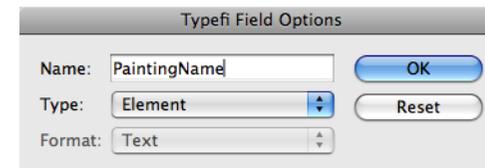
To apply a field to highlighted text inside a text frame:

- 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

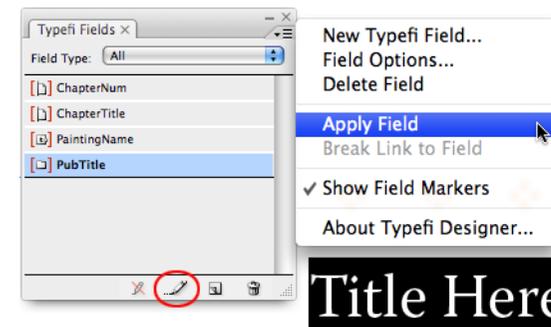
(Alternatively, double-click the **Field Name** to add Field Markers around the highlighted text).



Create new Typefi Field (with the choice of two ways)



Field Options: Element Field with Text as Content Type.



Applying the selected Field.

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 Typefi Publish 6 - Server User 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 Typefi Publish 6 - Server User Guide*).

Apply Field without text highlight

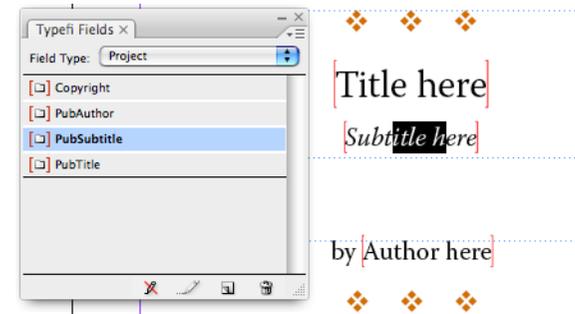
To insert a field in a text frame without having existing text highlighted:

- 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.

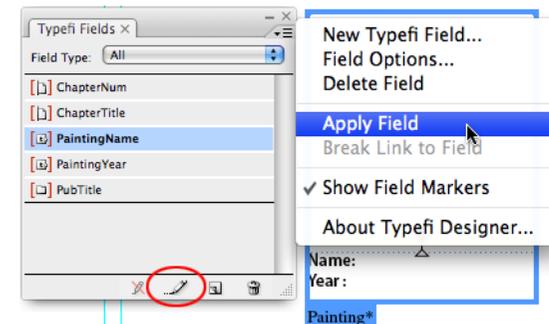
(Alternatively, double-click the Field name to add Field Markers around the highlighted text or click **Apply Selected Field** at the bottom of the **Typefi Fields** panel).

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 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.

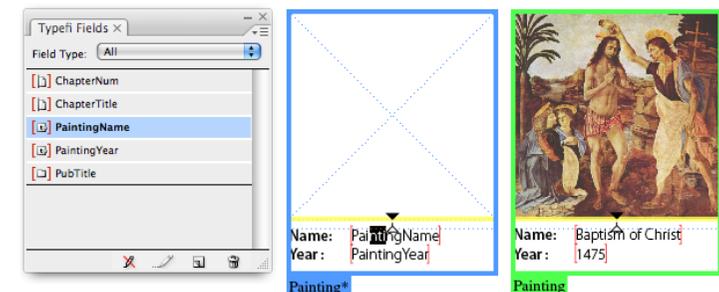
An InDesign Text Frame can contain multiple Fields as well as pre-defined text. The Element example here contains a Text Frame that not only fills two different Fields with text but also pre-populates the Text Frame with the words 'Name' and 'Year'. When the author inserts the Element in Word using Typefi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



Typefi Fields applied.



Apply Element Field example.



Element with two Element Fields (left) and example of the result (right).

Field updating

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 "[AutoFit tool](#)" on page 11) to adjust the frame as needed.

Updating 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' (broken away from the master) 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.

Updating 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.

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

Updating 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 are now no longer visible, indicating that the text is not marked up as a Field.

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 **Field Options...** and change the name).

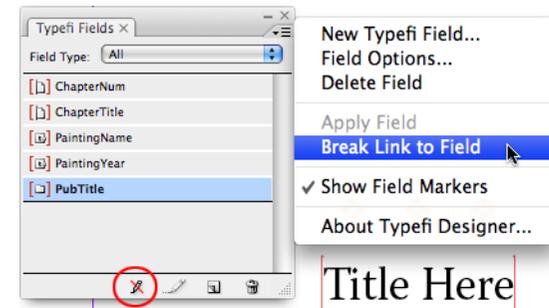
Each of these methods will update the Field name, but not the text that is listed between the Field Markers. To alter the text between the Field Markers you must edit it manually.

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



Break Link to Field.

(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 Frame types" on page 25*) and (not in every case) Typefi AutoFit (see *"AutoFit panel" on page 13*) 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 *"Designing a Section" on page 16*). 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" on page 62*). 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*" on page 51) 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

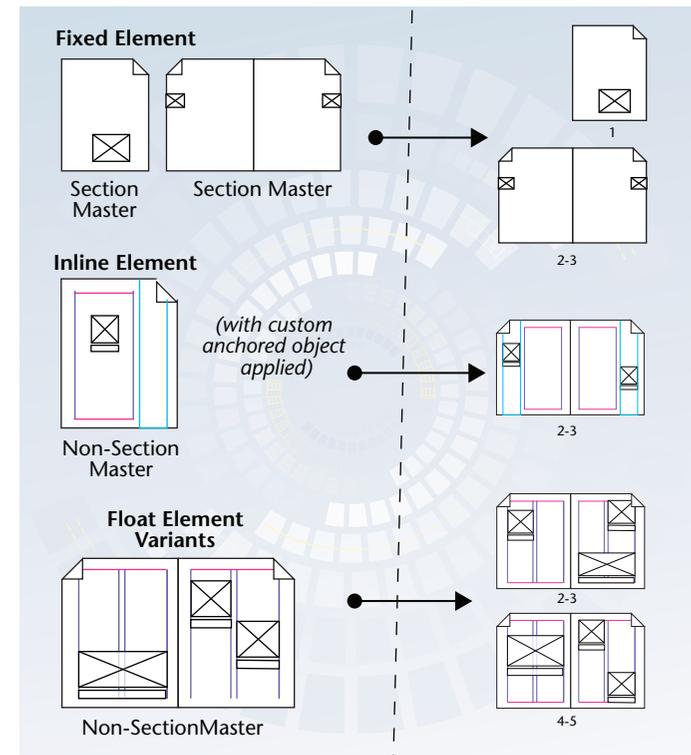
Step 3: Define Typefi Frames and Element Fields

Step 4: Apply Frame Types

Step 5: Define Elements and apply Fields

Step 6: Apply the defined Element to artwork

Step 7: Define Floating Elements, Variants and Layout Rules



Elements overview (simplified diagram).

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 *Master Element*, or an *occurrence* of the *Master Element variant*. Such elements cannot be Fixed, as only one occurrence of a Fixed Element can exist within a section.

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 body pages in a template document to a minimum.

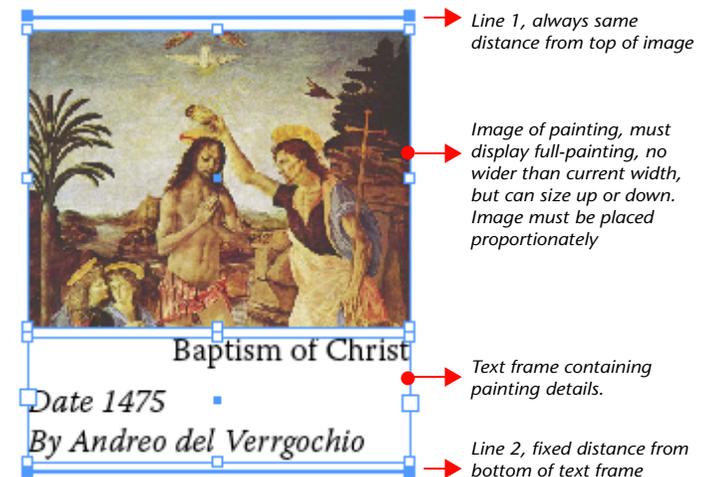
Therefore, as best practice, **create your Inline and Floating Elements on separate master pages that are not used by Typefi Sections** and create individual masters for each element type. Typefi Publish will use these elements as objects that it can draw from during the page composition process. To 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.

Step 2: Setting AutoFit relationships and attributes

Next analyse 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 (see "*AutoFit tool*" on page 11).

You should limit the template document 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 body pages a template document contains, the more time it will take the Typefi Designer plug-in to open and clear those pages.



Sample Element comprising multiple objects

Let's review the relationship and fitting requirements of the sample element again:

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: **Height Only**.

As the bottom of the text frame grows to make text fit, the line below it must move. Therefore, 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 prevents it exceeding this margin width.)

Consider width and height requirements

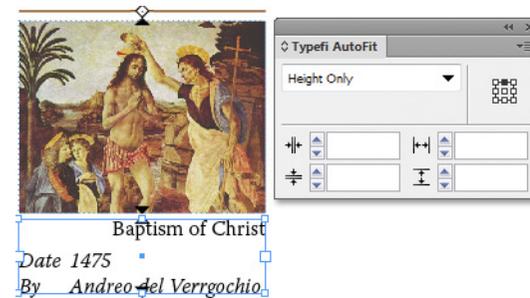
Use frame height restrictions—such as maximum height—to ensure that an element cannot grow beyond a reasonable size. Minimum size settings could be handy when an author inserts an element, but has not yet received content for that particular element. A minimum size setting would ensure that a certain amount of space is reserved in the layout for the element during page composition.

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:

1. Element Fields are generally used by the author for entry of data that is limited in length and would be inserted in normal InDesign Text Frames.
2. 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.
3. The Element Content frame should be applied to the Text Frame that is to hold the majority of the element's text, and can hold multiple paragraphs of text.



[Set AutoFit Relationships and Attributes.](#)

4. 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**" on page 62). Text frame threading must be retained within the element and may not thread to frames in other (nested) elements.
5. 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.

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 "**Typefi Fields**" on page 36. For additional information on **Frame Types** see "**Typefi Frame types**" on page 25).

Step 5: Define Elements

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

To define a new 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).

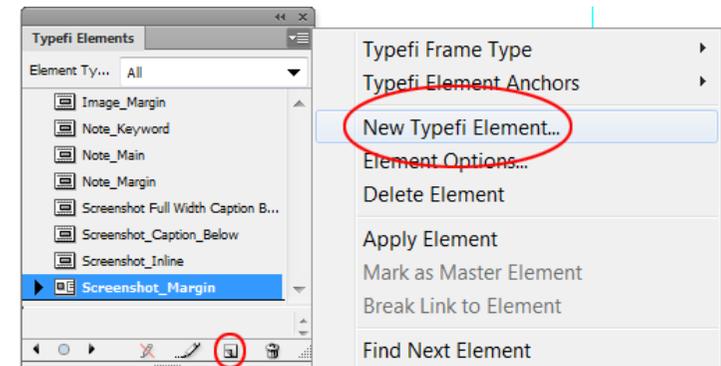
The **New Typefi Element** dialog box appears.

- Set the **Element Type** to either **Fixed**, **Floating** or **Inline**
- 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.



Element with fields added to a text frame



Defining a new Element (with two choices)

Defining a Fixed Element

To define a Fixed Element:

- Select **New Typefi Element** from the **Typefi Elements** panel menu (or 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**" on page 50)
- Click **OK** to add the New Element to Typefi Elements.

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.

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

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 [page 39](#).

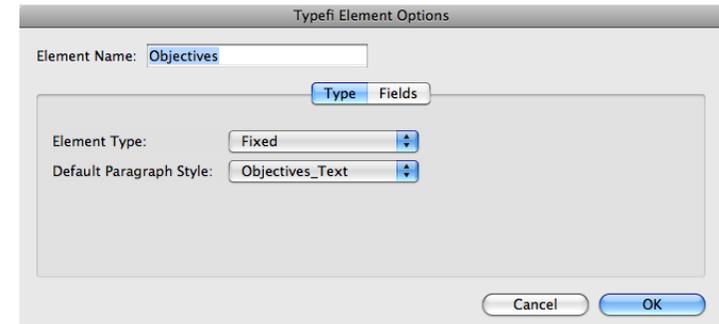
To assign Element Fields to an Element:

- 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.

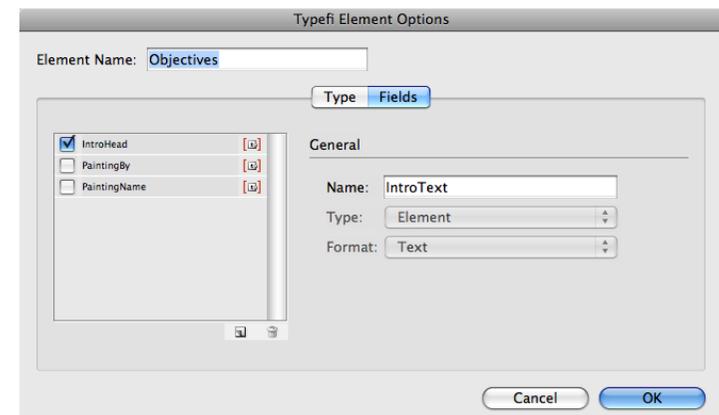
Alternatively, if the Element Field has not yet been defined:

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

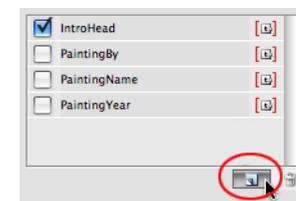
For all of the Fields assigned to the Element, the author is prompted to provide input data when inserting this element with Typefi Writer in Word.



Setting Fixed Element options.



Enabling Element Fields in Typefi Element Options.



The New Field button at the bottom of the Fields panel

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](#)" on [page 43](#).

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 assigned to the Element Content by Typefi Writer in Word (see "[Default Paragraph Style](#)" on [page 50](#)).

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** assigns a paragraph style that formats this paragraph in which the Inline Element is placed.

You should create a unique paragraph style for Inline Element placement in InDesign (which would probably not be available to authors). 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.

Defining a Floating Element

To define a Floating Element:

- Select **New Typefi Element** from the Typefi Elements panel menu, or 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" on page 50](#))

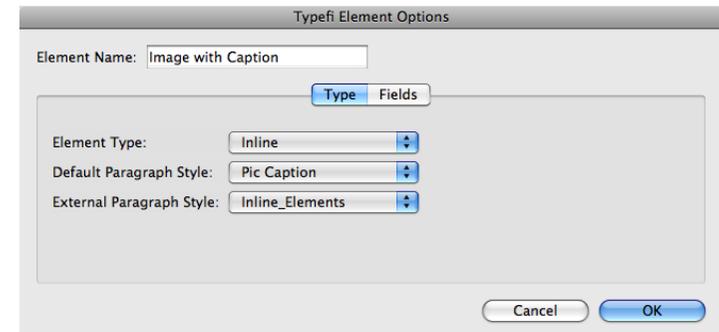
KEEP FLOATS IN ORDER

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 free to change the order of the Floating Elements during pagination, if this provides a better placement option.

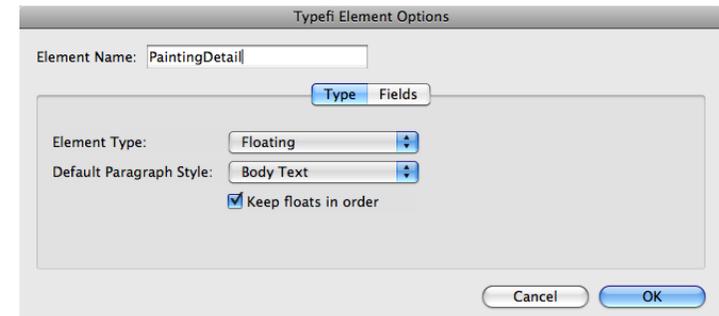
ASSIGNING ELEMENT FIELDS TO AN ELEMENT

Any fields that are part of the Element must be defined as part of the Typefi Element (See ["Assigning Element Fields to an Element" on page 50](#)).

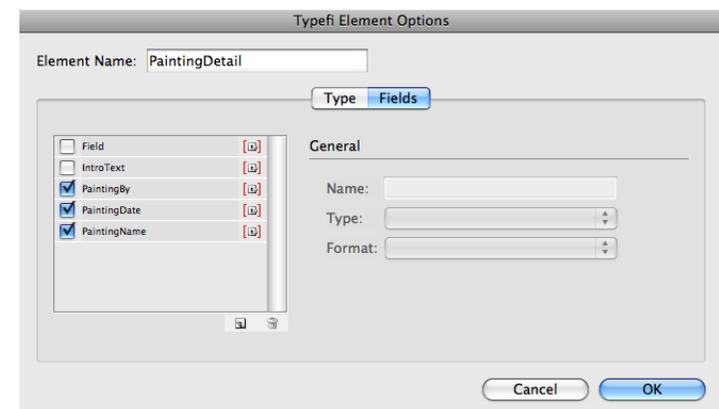
In the example above, we're defining the Floating Element for **PaintingDetails**. The three Element Fields added earlier must all be listed in the Used Fields list, so that the author will be prompted to enter the specific information requested by each of the Fields, e.g. Name



Inline Element – Typefi Element Options.



Defining a Floating Element.



Assigning Element Fields to the Typefi Element.

of the Painting (*PaintingName*), Date of the painting (*PaintingDate*) and the Name of the painter (*PaintingBy*).

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 Master Element. Applying the Element to selected artwork defines the Master Element.

Automatically Group Selections

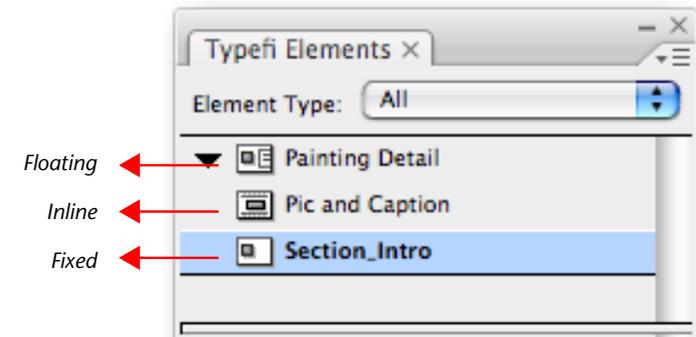
Artwork that is going to have an Element applied to it must be grouped. However, you won't need to manually group the objects before applying the Element. Simply enabling the *Automatically Group Selections* option in the Typefi Elements panel menu will do.

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

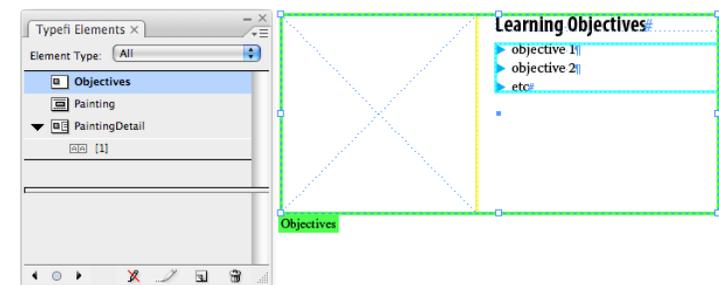
- Select all of the frames and lines that make up the element with the Selection tool
- Verify that the *Automatically Group Selections* option is enabled in the *Typefi Elements* panel menu
- Select the Element Name from the Typefi Elements panel. If you can't see the Element name, ensure that the Element Type menu lists *All* elements
- Select *Apply Element* from the panel menu, or click *Apply Selected Element* at the bottom of the panel.
- A default Light Blue coloured 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.

Master Element

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



Different Element Types.



Applying a Fixed Element to a selected group of objects.

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

Master Element and **Instance** Typefi Border colours could appear differently for documents with alternate **Typefi Border Preference** settings (see "**Typefi Borders**" on page 88).

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, or 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, or click **Apply Selected Element** at the bottom of the panel.

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

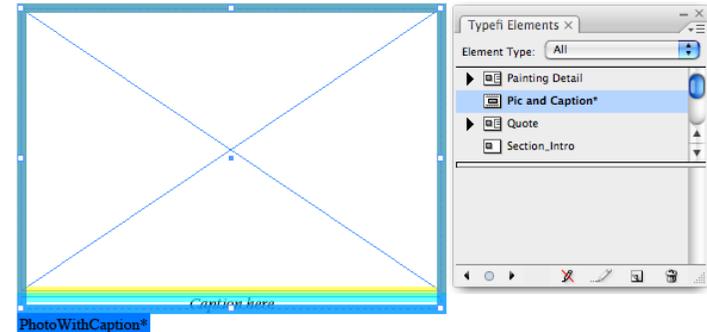
After applying the element to the artwork, consider applying an **Object Style** to the element that sets specific anchored object settings that position the Inline Element during page composition.

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

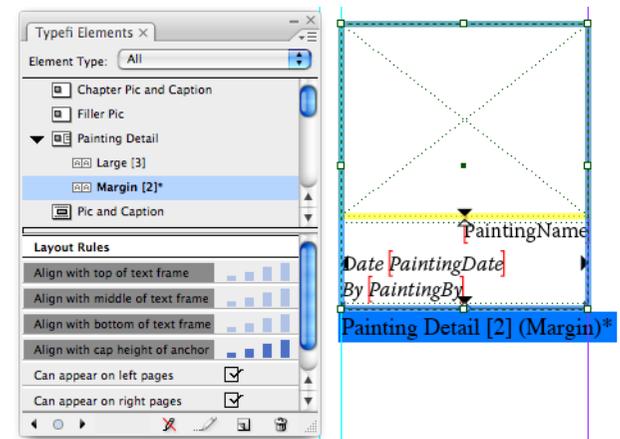
Apply Floating Element

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, or click **Apply Selected Element** at the bottom of the panel.



Inline Element applied.



Floating Element applied.

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 Master Element. Disabling the ***Marked as Master Element*** option from the ***Typefi Elements*** panel menu (only possible if there is another Instance of the Element) turns the Element into an instance of the selected variant. The default group border colour 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 Master Elements 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 Master Element 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 (for example, one element design may be targeted at a left-hand page, and another at the right-hand page).

Variants can also be used to define different horizontal span sizes for elements (for example, one variant may span both columns in a two-column design, while another variant of the same element fits neatly into a single column).

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 (for example, one variant could reserve a full page, while another could reserve half a page).

A variant must have a name in order for the author to be able to select it in the Writer.

Creating Variants for Floating Elements

A variant is automatically created when you first apply a Floating Element to selected artwork (see "[Apply Floating Element](#)" on page 54).

To create additional variants for a Floating Element:

- Select alternate element design artwork (such as a frame with caption)
- Click the particular Floating Element **name** in the Typefi Elements panel
- Choose **Apply Element** from the Typefi Elements panel menu, or click **Apply Selected Element** button at the bottom of the Typefi Elements panel.

Variants are automatically numbered [1], [2], etc., and during page composition **every** 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, and minimum space allowed between variants.

To edit the **Typefi Element Variant** options:

- Select **Element Options** from the Typefi Elements panel menu

(Alternatively, double-click the variant in the Typefi Elements panel).

The **Typefi Element Variant Options** dialog is displayed (see [screenshot](#))

- Enter the **Variant Name** (if needed)

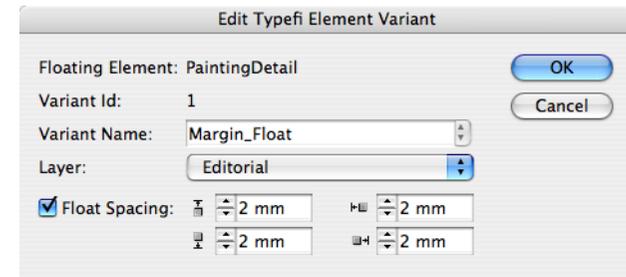
A variant name will be visible to the author in Typefi Writer and allow them to choose which variant is to be used during page composition. **Leaving the Variant Name empty will not provide the author with the choice of variant**, and consequently, the choice of variant is made by the Typefi Engine during page composition.

Different variants of an element can carry the same name (for instance, if there are right and left page versions of a Floating Element). Creating two variants with the same name, one for the left and one for the right hand page designs, will force 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 should be given different variant names so that the author can easily identify them when inserting an Element and choosing a variant.

- Select the **Layer** in which the variant should appear

By default the layer in which the current variant is placed is selected.



*A Variant (named **Margin_Float**) of a Floating Element named **PaintingDetail***

- **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 used 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 used by the layout engine during page composition and play an important role in determining where a Floating Element will be placed on a page.

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 (you may need to extend the panel vertically and drag the divider down to reveal them)

Layout Rules for variants consist of three different rule components (see [screenshot](#)):

- 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 prioritise 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

ALIGN WITH... RULE OPTIONS

Align with ... rule options determine the vertical and horizontal positioning of variants during page composition.

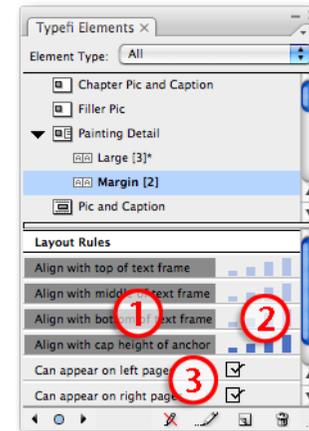
To define the ***Rule Options***:

- Click one of the dark grey ***Align With...*** bars in the Layout Rules section of the Typefi Elements panel

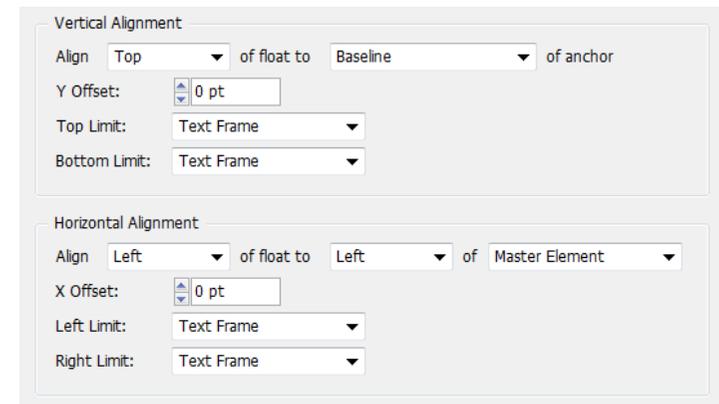
There are **four *Align with...* rule options** that can be set for a variant, namely:

- 1) Align with top of ...
- 2) Align with middle of ...
- 3) Align with bottom of ...
- 4) Align with ... of anchor

Note: If you move the Master Element 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.



Rule Options (Align With ...).

The first three rule options: *Align with top*, *Align with middle* and *Align with bottom* point to vertical positioning in relation 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 *Master Element*.
- 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 *Master Element*.
- 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 *Master Element*.

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.

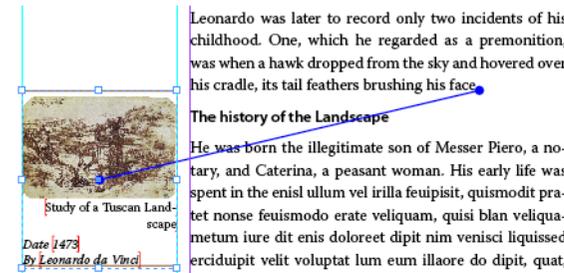
To display Typefi Anchors in InDesign:

- Select *Show Typefi Anchors* from the *View Menu*.

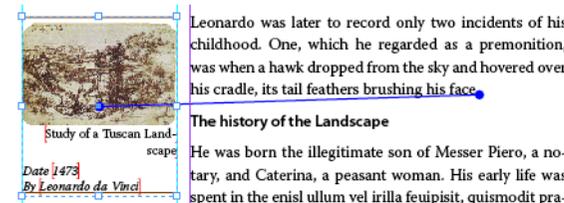
The *Align with...* of anchor option defines which part of the Floating Element Variant (Top, Middle or Bottom) is going to align to either the *Baseline*, *Cap Height*, *Top of Leading*, or *Top of Paragraph* of the anchor position. The anchor position relates to the point at which an author inserts an element into the Word document.

The following table summarises the anchor-based vertical alignment options.

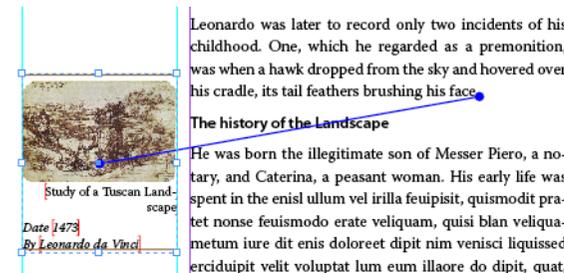
Option	Description
Baseline	Positions the top, middle or bottom of float to the baseline of the Anchor location for the element.
Cap Height	Positions the top, middle or bottom of float to the Capital Height of the line of text in which the anchor is placed.



Vertical Alignment example: Top of float aligned with Baseline of anchor.



Vertical Alignment example: Top of float aligned with Top of Paragraph of anchor.



Vertical Alignment: Top of float to Top of Leading of anchor.

Option	Description
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.

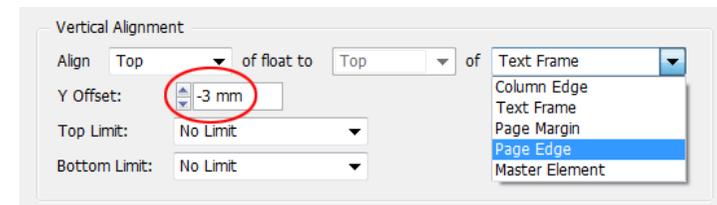
When an **Align with...** option is edited, the **Layout Rules** text display for the option in the Typefi Elements panel is updated.

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**.

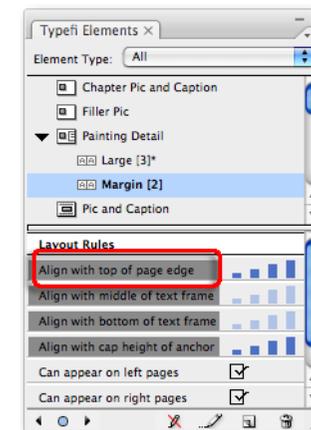
The **Y-offset** value defines a further vertical movement for the element after placement according to the **Align with...** rule options. A negative value will move the element up; a positive value will move the element down. The value (-3mm) assigned for the Y-offset in the previous Rule Options screenshot, 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 (-3mm) in the example above will push the Element -3mm into the bleed area of the document. The Top Page Edge value (equal 0mm), 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.



Rule Options for Align with Top of ... settings.



Edited Align with... rule.

Vertical Alignment Limit Options	Description
Page Edge	Variant placement must fall within the top and bottom edge of the page.
Master Element	Variant placement must fall within the top and bottom position of the actual Master Element. Setting these limits to Master Element 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, Centre, Right, Outside, Inside*) is going to align to the *Left, Centre, Right, Inside, Outside* of either *Column Edge, Text Frame, Page Margin, Page Edge* or *Master Element (default)*.
- Which part of the Floating Element Variant (*Left, Centre, Right, Outside, Inside*) is going to align to the *Anchor*

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.

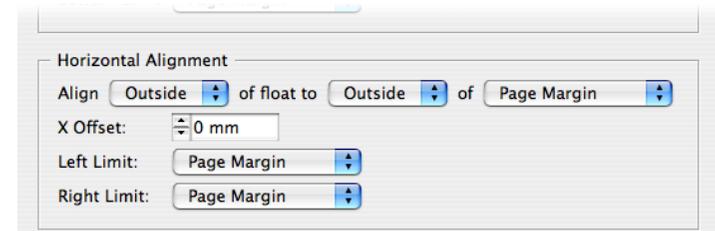
The use of Inside/Outside alignment options allows a single variant to be used on both Left and Right pages.

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.

Typefi Elements



Horizontal Alignment Options.



Element variant placement in double-sided layouts

Horizontal Left / Right Limit Setting	Description
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.
Master Element	Variant placement must fall within the left/right position of the actual Master Element. Setting these limits to Master Element 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.

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.



Priority Bars indicating rule preferences



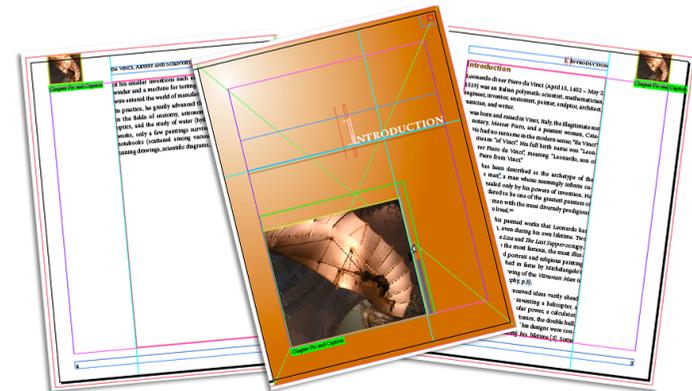
Choosing whether an Element can appear on left or right-hand pages (or both)

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.

Therefore, you should use Fixed Elements on the Master Page that starts a section (or any master used only once per section), rather than on the repeating 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.

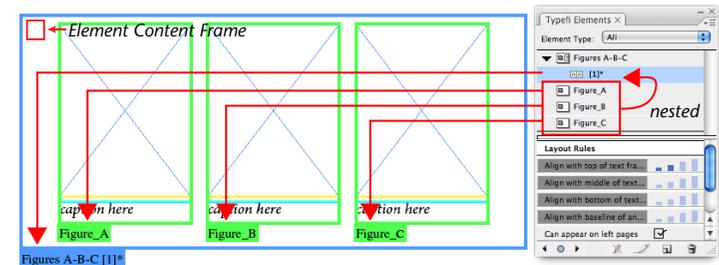


Fixed Element placed on different pages.

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, and an Element Content frame to hold them in place

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 in 'Normal' view (as with frames and text frame links, they are not visible in 'Preview' mode).

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.

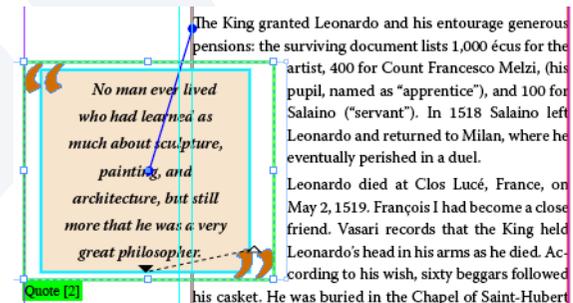
For Fixed and Floating Elements, the Story Editor will display a single Anchor icon. For Inline Elements, the Story Editor displays two Anchor icons. The first of these is the Typefi Anchor and the second is the InDesign anchor. Deleting the first anchor will leave the Element artwork in place, but it 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

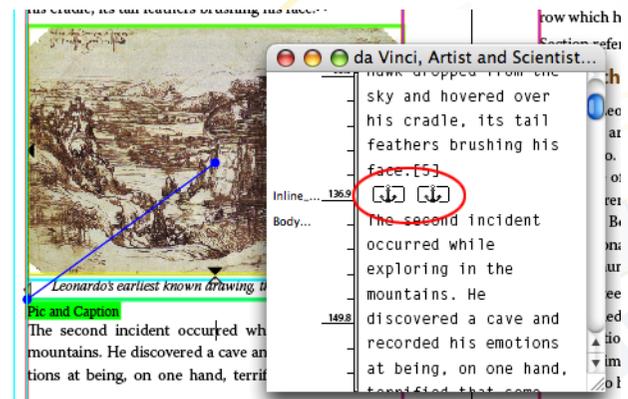
To edit the Anchor position:

- Start by displaying the Typefi Anchors
- 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.
- Place the cursor in the highlighted area and when the drag and drop text icon appears, click and drag the highlighted anchor(s) to their new position.

Typefi Anchors



Floating Element with Anchor relationship displayed.



Inline Element with double Anchor displayed in the Story Editor.

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 (which it is by default).

Creating Typefi Anchors

When a new Element instance is added to an InDesign document post-pagination, a Typefi Anchor is not automatically inserted.

Note: Anchors created for Inline Elements are inserted next to the InDesign anchored object anchor.

To create Typefi Anchors after placement of new Elements:

- Go to *Object > Typefi Element Anchors*
- Select the *Create At Start of Page* or *Create At End of Page* command

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.

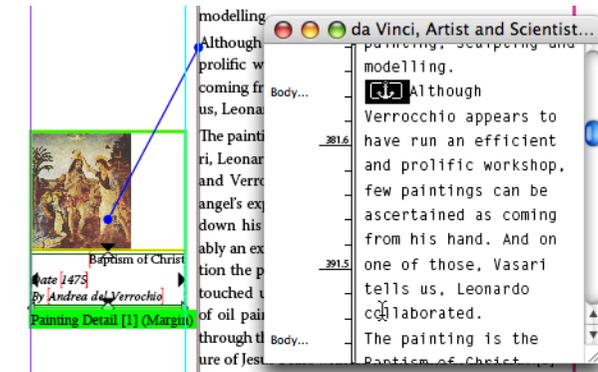
Create At End of Page

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" on page 63](#).

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:

- Go to *Object > Typefi Element Anchors*
- Select *Remove all Anchors*

Table Styles

In contrast to earlier versions, *there is no need to create prototype Typefi tables in version 6*. Control of table width has reverted to the author using Typefi Writer in Word. All a publication designer needs to do is create the table styles needed. An InDesign **Table Style** prescribes how a table is to be formatted. When you define a table style and apply it to many tables, each table is formatted exactly the same as the others. As you edit the table style, any tables formatted with the style will automatically be updated throughout the document. (Cell Styles are available in an XML workflow.)

Table Styles include specific properties—such as table formatting and column width behaviour—that is used during the Typefi process. All of the Table Style settings 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.

Creating Table Styles

You can create Table Styles from a base table style design created using InDesign's built-in Table Styles, Cell Styles, and Table feature, and then further formatted to the design requirements.

In contrast to how Elements work, Table Styles are fully self-contained and don't require the original table to be kept, similar to the way 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 is no longer required for formatting purposes.

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].

Enter at least the minimum rows and columns settings required to create a table that can contain all table attributes.

Row Types

Header Rows are rows located at the top of the table and can repeat themselves when a table breaks across columns, frames or pages during pagination. **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.

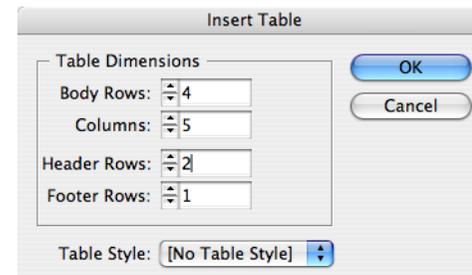
Format table

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, footer rows and body cells with paragraph styles. In addition, create InDesign Cell Styles to allow custom formatting of header rows.

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. There is a Typefi module called *Enhanced Table Formatting*, which addresses these shortcomings.

New Table Style

Once you've created and formatted the table in InDesign you are ready to create a new Table Style.



Insert table using InDesign native table dialog

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.

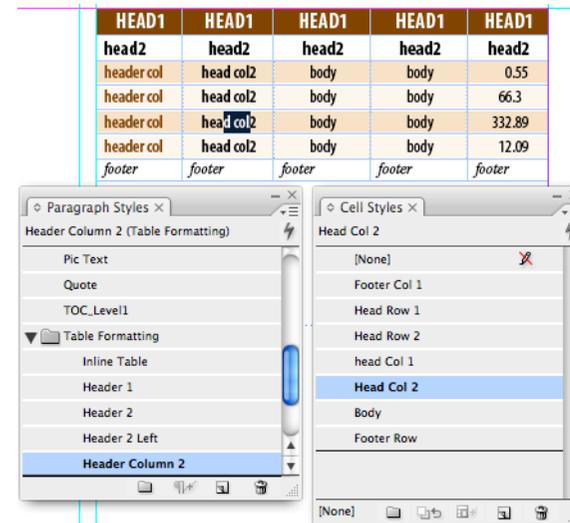


Table fully formatted.

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.

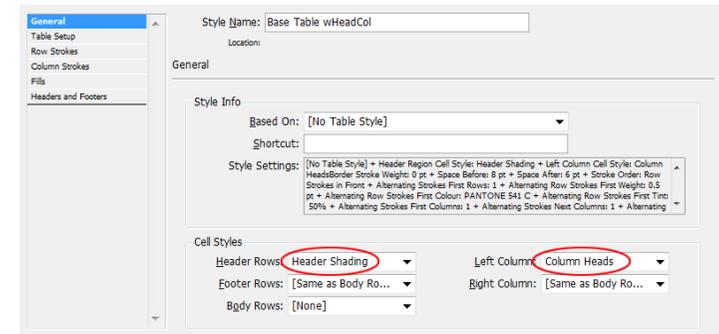
- Make the appropriate table attribute changes where required for each of the categories listed in the dialog: **General, Table Setup, Row Strokes, Column Strokes, Fills, Headers and Footers**.
- Click **OK** to add the Table Style to the Table Styles panel.

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.

Mark as Master Table

The InDesign Table menu contains an additional Typefi Publish-specific item: **Typefi Table > Mark As Master Table**

'Mark as Master Table' explicitly indicates the table in the template that should be used as the basis for new table instances.



New Table Style dialog, with choice of Cell Styles for Header Rows and Left Column

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 (*see “xxx” on page x*), a source reference that refers to a heading and/or page number the reader may read for additional information. The production designer chooses or creates the various cross-reference formats that will be available to the authors using Typefi Writer in Microsoft Word. Cross-references may be added to the InDesign output file in the post-production phase.

You cannot make a cross-reference to a project or section field in Typefi Publish 6—this is due to the fact that **the Typefi process now uses InDesign’s native cross-references and formatting** (which allows custom formats). Since ‘project fields’ and ‘section fields’ do not exist in normal InDesign documents, there can be no cross-references to them. Such cross-references in legacy documents will have to be modified or removed, and all others checked for type of format. **There is no need for a separate page number cross-ref**, and such redundant page number cross-refs should be deleted.

Cross-references of various types and formats 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.

Post-Production Cross-referencing

InDesign allows for easy editing and creation of cross-references based on selection of cross-reference sources that point to the following categories:

- **Paragraph:** 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.
- **Text Anchor:** references pointing to Text Anchors created using the *Hyperlink Destination* choice in the Hyperlink panel menu.

Do not use InDesign 'Bookmarks' as the source for a cross-reference—they are alphanumeric text strings that make no sense.

Inserting a Cross-reference

A cross-reference uses source text (including or excluding automatic numbering), anchor name, paragraph numbers, 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 place the text cursor at the cross-reference insertion point:

- Select *Hyperlinks & Cross-References > Insert Cross-Reference...* from the *Type* menu.

The InDesign *New Cross-Reference* dialog box is displayed.

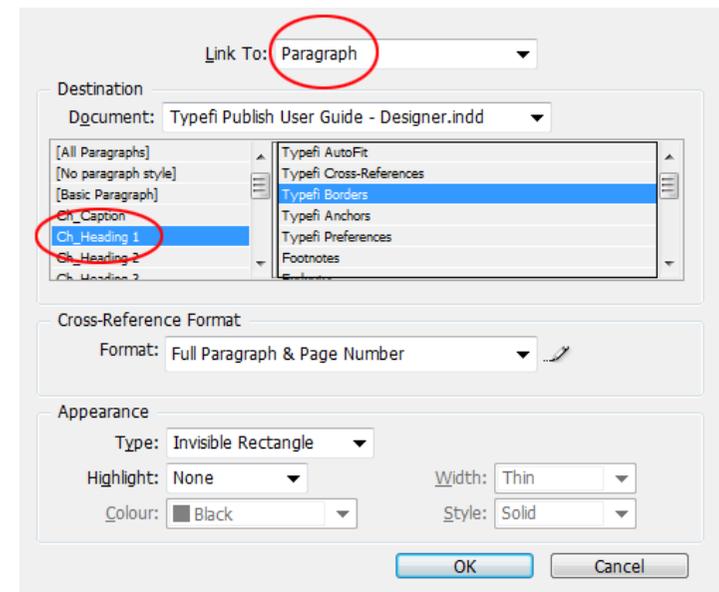
- Choose *Paragraph* in the *Link To* area (circled in screenshot)
- Select the paragraph style with which the source content is formatted (circled in screenshot)
- Select the particular heading to which you are making the cross-reference from the list that appears
- Set the *Cross-Reference Format* to the most suitable one (or make a custom one)

These are the formats available by default:

Format Name	Explanation
<i>Full Paragraph & Page Number</i>	insert the text of the entire paragraph (usually a few words only, such as headings), including the page number, as the cross-reference (for EPUB, this should be edited to not include the page number)
<i>Full Paragraph</i>	copy just the text of the entire paragraph
<i>Paragraph Number & Page Number</i>	insert the number of the paragraph (such as a numbered heading), and the page number as the cross-reference



A *Hyperlink Destination* that will be suitable for a cross-reference to a Text Anchor



Insertion of paragraph cross-reference.

Format Name	Explanation
<i>Paragraph Number</i>	use just the number of the heading as the cross-reference
<i>Text Anchor Name</i>	use the name you created as a text anchor as the cross-reference
<i>Text Anchor Name & Page Number</i>	the above plus page number
<i>Page Number</i>	use just the page number as the cross-reference (for EPUB, this would have to be modified)
<i>[your custom format]</i>	[create using building blocks provided]

Here is an example of a customised cross-reference format:

```
(See <cs name="Bold"></cs><fullPara /> <cs name="[None]"></cs>on <cs name="Bold"></cs>page <pageNum />)
```

This would appear as:

(See "Typefi Sections" on page 6)

Text Anchors

To insert a cross-reference that points to an InDesign text anchor, you must first ensure that you have created some InDesign text anchors using the Hyperlink Destination (see "Typefi Hyperlinks" on page 88).

- Choose **Text Anchor** from the **Link To** drop-down menu (circled in screenshot)
- Select the relevant **Text Anchor** from the pop-up menu (circled in screenshot)

In the example shown the cross-reference will point to the 'AutoFit' Text Anchor. The **Text Anchor** list will display the names of all available InDesign text anchors.

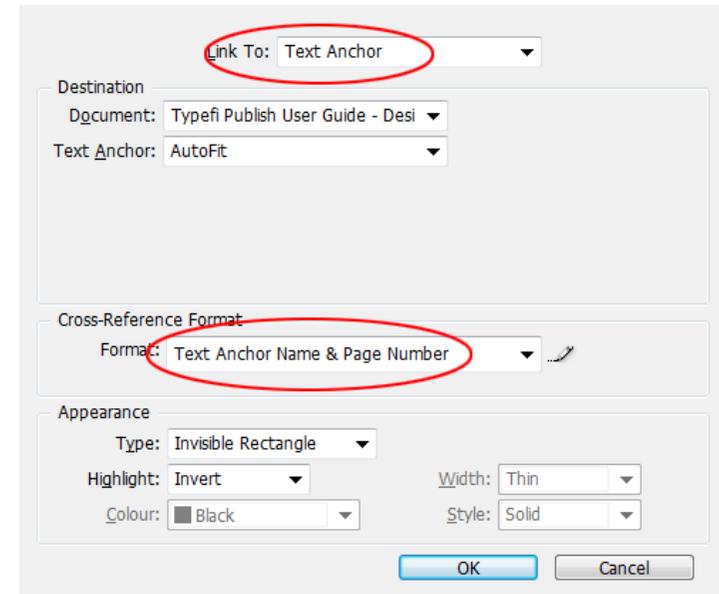
- Select the appropriate cross-reference format from the **Format** list (see [table above](#)).

InDesign Bookmarks and Hyperlinks

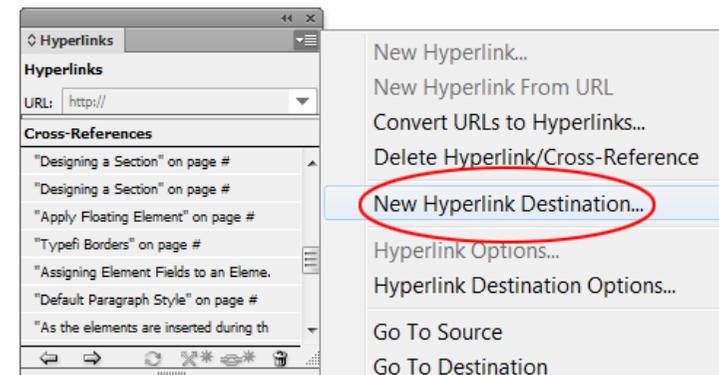
The best results for a cross-reference to text other than a heading is to create a **Hyperlink Destination**.

To create an InDesign text anchor:

- Select **Window > Interactive > Hyperlinks** panel
- Highlight the source text and select **New Hyperlink Destination** from the panel menu
- Choose **Text Anchor** in the following dialog
- Modify the name if necessary



Insertion of text anchor cross-reference.



InDesign Bookmarks panel.

- Click **OK**.

The Text Anchor is created and is now available as a cross-reference source.

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.

For more detailed information on InDesign bookmarks and hyperlinks please refer to InDesign Help.

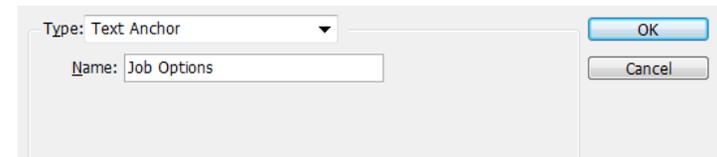
Word Hyperlinks: Word documents containing native Word hyperlinks for web and email addresses are automatically converted to InDesign hyperlinks during page composition. To format these types of hyperlinks differently, add a *Hyperlink* character style to the InDesign template, and apply the style to the hyperlinked text.

Update Cross-reference

To update a cross-reference (only possible if either the source or the cross-reference itself have been modified):

- Insert the text cursor anywhere in the cross-reference text
- Select *Hyperlinks & Cross-references > Update Cross-Reference* from the *Type menu*.

The selected cross-reference is now updated.



Choosing the Type of Hyperlink Destination and the name for the Text Anchor

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.

In Typefi Publish, footnotes appear at the bottom of the Main Story text frame during page composition (*except in EPUB production, in which the footnotes appear as endnotes*).

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 InDesign template settings under **Type > Document Footnote Options...** This means that none of the Word footnote settings will be retained.

Note: 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.

When a footnote is inserted in Word, Word automatically generates a **Footnote Reference** and **Hyperlink** character style. The **footnote reference** style in Word formats the reference number in the text. As best practice, you might want to add similarly-named character

Creation of Adam. His drawing of the Vitruvian Man¹ is also iconic. (See also: [Biography](#), p.9).

As an engineer, Leonardo conceived ideas vastly ahead of his own time, conceptually inventing a helicopter, a tank, the use of concentrated solar power, a calcula-

¹ Vitruvian Man, 1492 artwork representing the proportionalised man, based on work by a Roman architect called Vitruvius

A footnote in InDesign appearing at the bottom of the Main Story frame

styles to the InDesign template. (Use all lower-case, e.g. 'footnote reference' due to renaming of styles in RTF format.)

There is an important setting in the *Document Footnote Options* concerning the *Footnote Reference Number*. It is important to set the Character Style to *[None]* (see [screenshot](#)), otherwise the formatting of the footnote reference number will continue to the end of the paragraph (or another character style).

The footnotes themselves in Word are formatted using the *Footnote Text* paragraph style. You should create a similarly named (use lower-case only) style in InDesign for use in defining the *Document Footnote Options*...

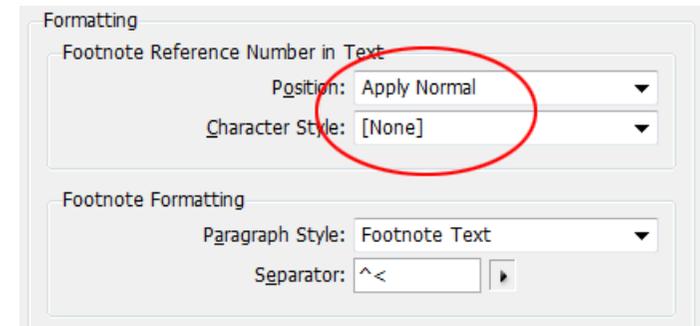
In addition, Word supports continuous footnote numbering across sections. InDesign only supports numbering across a section, spread or page. This means that for a Word document that contains multiple sections and continuous footnote numbering, the footnote numbering will be reset according to the InDesign footnote options.

Although InDesign doesn't support continuous footnote numbering across sections, consider setting the *InDesign Output Format* in 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. Also, **footnotes 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.



Set the Footnote Reference Number Character Style to [None] to avoid formatting errors

Endnotes

InDesign has no support for endnotes. However, where endnotes are inserted by the author in Word, endnotes are published as footnotes (vice versa in EPUBs), 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.

EPUB Export for InDesign CS 6

InDesign CS6 has improved EPUB export features that Typefi Publish uses as the basis for creating a flexible and streamlined EPUB production workflow. With Typefi Publish and InDesign CS6, you have greater control over how your EPUB eBooks are created. Within an InDesign template you will be able to define how your elements are rasterised for on-screen viewing. Also within the template you will create export presets that define just the options you need for your EPUB export workflow. This guide will teach you step-by-step how to use the EPUB Export Script.

New Process

There are a number of changes to EPUB Export in Typefi Publish 6 when compared to Typefi Publish 5.x (InDesign CS5.5). First and foremost are the changes to EPUB Export parameters in InDesign CS6. Second is the direct support for EPUB Export in Typefi Publish 6 (no more secondary script to install). This guide shows you how to set up a job for EPUB Export in Typefi Publish 6, along with notes on how it has changed from Typefi Publish 5.x (InDesign CS5.5).

If necessary, we will supply a script which will convert your Publish 5 EPUB presets to Publish 6-compatible presets. Place the 'UpdatePresetsToPublish' script in your InDesign CS6/Scripts/Scripts Panel folder. The script can be run from the Scripts panel within InDesign. The script expects there to be one document open (e.g. your template). The script seeks out any preset tables in the open document and will attempt to map the parameters in the preset to Publish 6 equivalents. When the script is done, your preset tables should now work with Publish 6.

Note: In addition to converting the presets, you must also ensure that the preset tables get composed on to a page by the Publish 6 Engine. This is a major change from Publish 5, in which the presets were expected to be on a master page, but did not have to get put in to an 'active' page of the composed document. **This change allows the presets to take advantage of Typefi Fields.** Fields need to be on a composed page in order to receive an actual value. The most common practice is to put the preset tables on a master page that is used by each document that is generated (for example, the title page master or the cover page master of a book). The Publish 6 Engine will seek out any EPUB Presets that are on a composed page of the generated InDesign document.

Step 1: Setting up the EPUB Preset Frame

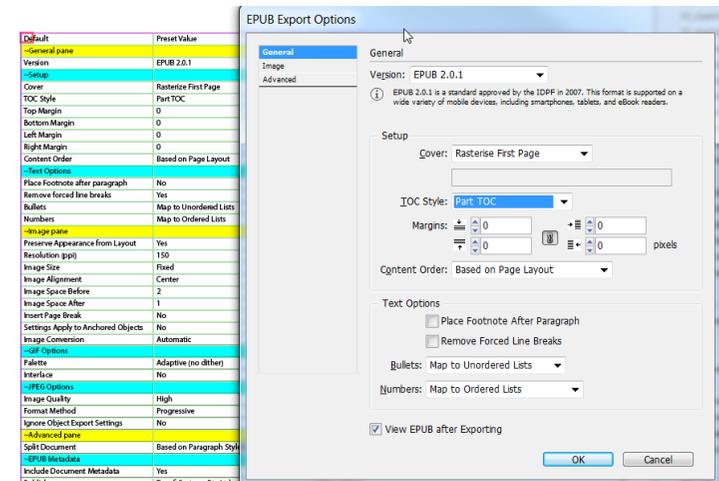
The EPUB Export script refers to one or more text frames that contain one or more 'preset tables'. These preset tables contain the EPUB Export Options that would normally be entered by hand when exporting an EPUB using the desktop version of Adobe InDesign.

The EPUB Export script finds these preset tables by the name of the text frames that hold the preset tables. These text frames are all named 'EPUB Presets' via the Layers panel. The text frames should also reside on a specially-created 'Presets' layer. Anything on the Presets layer will be automatically moved to the pasteboard before EPUB export. This will effectively make those items invisible when exporting the EPUB. (Hiding or making the layer non-printable is not enough to exclude an item from EPUB Export.)

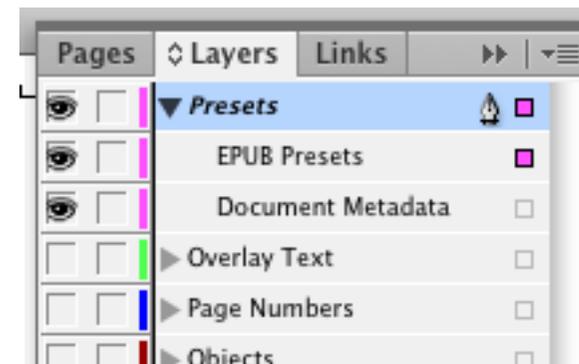
Each table is a single preset with a unique name. If there is more than one preset table, then the EPUB Export script will export an EPUB file for each preset. The EPUB file name will contain the preset's name so you know which EPUB file goes with each preset.

These preset tables only need to contain the parameters you wish to change from the default settings. For example, if you only wish to change the resolution of the raster graphics from the default 150ppi to 96ppi, then your preset would only contain a row for the name of the preset and then one row for the Resolution parameter.

The actual contents of the EPUB Presets text frame are composed via CXML during the job run. This allows the user to make use of variable data such as filling in the author, publisher, or ISBN for each job that is run. It is easiest to set up the 'EPUB Presets' named



Comparison of the EPUB presets and the InDesign dialog used in manual EPUB creation



The Layers panel showing the named text frames containing the preset and metadata tables

text frame as a **Typefi Floating Element**. This floating element can show up on any 'live' page of the InDesign document.

The EPUB Presets Table is available as an InDesign 'snippet' that will be provided to you upon request. It is called 'EPUB Preset Default Values.idms'.

- Within your InDesign EPUB template, create a new layer via the Layers panel and name it 'Presets'
- Ensure other layers are locked and the 'Presets' layer is selected
- Choose **File>Place**, locate the snippet, and put it on the title master or another suitable master page (one always used in composition) in the 'Presets' layer
- Name the text frame 'EPUB Presets' via the Layers panel by clicking on the triangle next to the layer that contains the text frame (the frame will be called '<text frame>')
- Click once on the name, pause, then click again and rename it 'EPUB Presets'

EPUB Export as a Book job: If the EPUB is being exported as a Book job, then this EPUB Preset text frame needs to be composed within the first InDesign document that appears in the InDesign Book file (i.e. the first Section of the CXML). EPUB Preset frames that are in any of the other documents of the book will be ignored.

If the text/table frame is not on the correct layer, select the text frame, and within the Layers panel you will see a square icon at the far right that indicates the selected item. Drag the icon to the Presets layer you created.

Step 2: EPUB Export Table Options

The InDesign EPUB Export Options are organised into three sections: General, Image, and Contents. We will cover all the available preset options in the same order as they are displayed in the EPUB Export Options window. The EPUB Presets Table allows you to define and customise your export options.

- The first step is to name your EPUB Preset (**very important**). In the very first cell of the EPUB Export Table, you will see 'Default', and this is where you enter the name of your EPUB Preset (whatever you like). Replace 'Default' with the name of your Preset. This is the value that will be added to the Job Option that will be created within your TPS EPUB Project (and it must match exactly). We will discuss that in the next section.
- The next step is to configure your EPUB Export Options within the EPUB Export Table. Shown below are all the variables that are available to you as EPUB Export Options. Change the values in the table for your specific workflow.

EPUB Errors on Export

Sometimes there can be errors in an EPUB Export preset that will still successfully create an EPUB document. If the EPUB Export script determines that an EPUB will export with errors, the script can do one of two things:

- Export the EPUB as it is and log an error in the Job log, or
- Abort the EPUB export and log an error in the Job log. By not exporting the EPUB as expected, this will call attention to a problem with your EPUB Export preset.

Add the following row to your preset if you wish to Abort on Error:

Abort on Error	Yes
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The default action is to always export the EPUB, even if there are errors with the EPUB Export preset.

EPUB Export Options: General EPUB

~ General EPUB	Available Options	Default Value	Comments
Include Document Metadata	true false	true	To add Metadata to your InDesign Document, select File > File Info. In the Description Tab, enter the Metadata you would like to have exported to your EPUB. Only the following fields are supported: Document Title, Author, Description, Keywords, and Copyright Notice.
Add Publisher Entry	text string		Specify the publisher information that appears in the eBook metadata. You can specify a URL for the publisher so that someone who receives the eBook can visit the publisher's website.
Unique Identifier	text string		Every EPUB document requires a unique identifier. You can specify the unique identifier attribute. If you leave this field empty, a unique identifier is automatically created.
~ EPUB Cover			
EPUB Cover	No Cover Image Rasterise First Page Use Existing Image File	Rasterise First Page	The Default EPUB export preset uses the Rasterise First Page to create the cover page in the eBook. To use a different cover image, change the value to "Use Existing Image File" and then specify the file path (see next row).
Use Existing Image File Path	File path to the cover image file		This option is not defined by default, so if you would like a different cover image, enter the path to the image here. For example: C:\Typefi\Publish\Filestore\Pub\Images\Cover.eps. NOTE: For InDesign to use this field, you must enable the "Use Existing Image File" option (see row above).
~ Ordering			
Ordering	Based on Page Layout Same as XML Structure Same as Articles Panel	Based on Page Layout	This is the order in which the contents of your publication will be ordered within the EPUB file. There are three options: Based On Page Layout: InDesign determines the reading order of page objects by scanning left to right and top to bottom. In some instances, especially in complex multicolumn documents, the design elements may not appear in the desired reading order. Use a dedicated HTML or XML editor (such as Dreamweaver or Oxygen) to open the EPUB file and rearrange and format its contents. Same As XML Structure: The order of the tags in Structure View determines the reading order. Same As Articles Panel: The order of elements in the Articles panel determines the reading order. Only the checked articles are exported. NOTE: Inline elements do not appear in the Articles panel. They are exported in the order in which they appear within the text.
~ Formatting Options			

~ General EPUB	Available Options	Default Value	Comments
Book Margin Units	em pixel	em	Em is the default unit of measurement. You can use pixels if you prefer. An em is a unit of measurement that's equal to the currently specified text size of the eBook reading device. So when a reader changes the text size on their eBook reader, all the text will resize proportionally when you use the em unit. InDesign considers 12pt equal to 1em. So 24pt is 2em, and so on. By using em units for the book margins, text, and images, your eBook layout will proportionally adapt to the dimensions of different screen sizes. The pixels unit of measurement, on the other hand, is a fixed measurement system. As a result of using this system, your eBook layout may not adapt as well when viewed on different screen sizes. NOTE: Only Adobe-supported eBook readers currently utilise the Book Margin Units setting. It's not compatible with the Apple iBooks app or the Amazon Kindle.
Book Margin	number	0.5	Specify the book margin in Ems or pixels. Specifying margins in Ems is better for multiscreen compatibility. The same value is applied to all margins: top, bottom, left, and right.
Bullets	Map to Unordered Lists Convert to Text	Map to Unordered Lists	Select Map To Unordered List to convert bulleted lists into HTML list items, which use the tag. Select Convert To Text to format using the <p> tag with bullet characters as text. If you have used native InDesign auto-bullets, subbullets are also included. NOTE: This option only applies to bulleted lists that were created using the Bullets and Numbering feature of InDesign. Lists that were created manually are not converted to HTML lists.
Numbers	Map to Ordered Lists Map to Static Ordered Lists Convert to Text	Map to Ordered Lists	Determines how numbered lists are created in the EPUB file. There are three options: Map To Ordered Lists: Converts numbered lists into HTML ordered lists using the and tags. Map To Static Ordered Lists: Converts numbered lists into HTML ordered lists using the and tags and assigns a <value> attribute to each paragraph based on its current number in InDesign. NOTE: When using the Map To Ordered Lists and Map To Static Ordered Lists options, the actual numbers are not included in the HTML file. Instead they are rendered by the eBook reader. Convert To Text: Converts the numbered lists into paragraphs that begin with the paragraph's current number. The number is included as text in the HTML file. NOTE: This option only applies to numbered lists that were created using the Bullets and Numbering feature of InDesign. Lists that were created manually are not converted to HTML lists.

EPUB Export Options: Image

~ Image	Available Options	Default Value	Comments
Preserve Appearance from Layout	true false	true	True will inherit the image object attributes from the layout.

~ Image	Available Options	Default Value	Comments
Resolution (ppi)	150 300 72 96	150	Specify the resolution of the images in pixels per inch (ppi). While operating systems have standardised on either 72 ppi or 96 ppi, mobile devices range from 132 ppi (iPad), to 172 ppi (Sony Reader), to over 300 ppi (iPhone 4). You can specify a ppi value for each object selected. Values include 72, 96, 150 (average for all eBook devices today), and 300. TIP: In most cases, using a resolution of 150 ppi for all images will provide optimal image display for the majority of the eBook reading devices currently on the market. You might want to specify 300 ppi for images that contain a lot of detail, such as maps. This provides enough image data to allow a user to zoom in on an image to view its details.
Image Size	Fixed Relative to Page	Fixed	Specify whether the image size should be fixed or resized relative to the width of the page. Relative To Page Size sets a relative percentage value based on the size of the image relative to the InDesign page width. This option causes the images in the EPUB file to rescale proportionally, relative to the width of the reading area. If you specify Fixed, the images are exported at their current dimensions (as measured in pixels).
~ Image Alignment and Spacing			
Image Alignment	Center Left Right	Center	Specify how you want the images to be aligned relative to the page.
Image Spacing Unit	em pixel	em	Em is the default unit of measurement. You can use pixels if you prefer. This option applies to the following two options.
Image Space Before	number	0	Specify how much space you want to appear above the images in the EPUB file.
Image Space After	number	0	Specify how much space you want to appear below the images in the EPUB file.
Insert Page Break	true false	false	Determine whether or not you want a page break inserted before, after, or before and after images. If you specify True, determine where you want the page breaks to occur by specifying an option in the following row. NOTE: When you specify True, the page breaks are defined in the CSS file using the page-break-before and/or page-break-after properties.
Image Page Break	After Image Before Image Before and After Image		Specify where you want the page breaks to occur. Page breaks can be inserted Before Image, After Image, or Before and After Image.
Settings Apply to Anchored Images	true false	false	Specify True to apply the image options to all anchored objects in the document. TIP: If your document contains anchored images that don't have specific Object Export Options applied (Object > Object Export Options), specify True to be sure they are exported with the same options the other images are using.
~ Image Conversion			
Image Conversion	Automatic GIF JPEG PNG	Automatic	Determine whether the optimised images in your document are converted to GIF, JPEG, or PNG. Choose Automatic to let InDesign decide which format to use in each instance. Choosing PNG disables the image compression settings. TIP: Use PNG for lossless images or for images that include transparency.
~ GIF Options			

~ Image	Available Options	Default Value	Comments
GIF Options Palette	Adaptive (no dither) System (OS X) Web System (Win)	Adaptive (no dither)	Lets you control how InDesign handles colours when optimizing GIF files. The GIF format uses a limited colour palette, which cannot exceed 256 colours. Choose Adaptive to create a palette using a representative sample of colours in the graphic without any dithering (mixing of small spots of colours to simulate additional colours). Choose Web to create a palette of web-safe colours that are a subset of Windows and OS X system colours. Choose System (Win) or System (OS X) to create a palette using the built-in system colour palette. This choice may cause unexpected results.
GIF Options Interlaced	true false	false	Select Interlace to load the images progressively by filling in missing lines. If this option is not selected, an image might look fuzzy and gradually becomes clear as the image reaches full resolution. NOTE: You will likely not notice this effect when using current eBook reading devices, because their graphics cards adequately support the fast display of images. Historically, interlaced GIF graphics were used on websites that could take a while to load. Rather than display a blank area before the image can load, the image is loaded progressively.
~ JPEG Options			
JPEG Options Image Quality	High Low Medium Maximum	High	Determines the trade-off between compression (for smaller file sizes) and image quality for each JPEG image created. Low produces the smallest file and lowest image quality.
JPEG Options Format Method	Baseline Progressive	Progressive	Determines how quickly JPEG graphics display when the file containing the image is opened on the web. Choose Progressive to make the JPEG images display gradually and in increasing detail as they are downloaded. (Files created with this option are slightly larger and require more RAM for viewing.) Choose Baseline to make each JPEG file display only after it has been downloaded; a placeholder appears in its place until the file displays. NOTE: This option only applies to the Web viewing experience, not to eBook reading devices.
Ignore Object Export Settings	true false	false	Specify True to ignore the Object Export Options that are applied to individual objects. TIP: If you have applied Object Export Options to specific elements (such as tables and maps), specify False to ensure the most optimal settings are used for each element.

EPUB Export Options: Contents

~Contents	Available Options	Default Value	Comments
Format for EPUB Content	XHTML DTBook	XHTML	Specify whether you want to use the XHTML or DTBook format. DTBook is a specialised format that is intended for sight impaired end readers.
~ Contents			

~Contents	Available Options	Default Value	Comments
Use InDesign TOC Style	true false	false	Specify True if you want to generate a table of contents based on the specified TOC style (identified in the following row). Choose Layout > Table Of Contents Styles to create a TOC style for your eBook. NOTE: When this option is set to True, InDesign generates two TOC types: a traditional table of contents and a navigation guide. The traditional table of contents appears as a page in the eBook and each entry is a clickable hyperlink. No page numbers appear in the generated TOC. The navigation guide appears as a menu in an eBook reader. Each eBook reader displays this menu differently.
InDesign TOC Style Name	TOC Style Name		If you specified True in the row above, identify the TOC style name you want to use to build the table of contents and navigation guide in the eBook. NOTE: The default settings do not use a TOC style, so this cell is empty in the presets table.
Break Document at Paragraph Style	true false	false	Specify True to split the InDesign document into multiple HTML files (within the EPUB file) at a specified paragraph style. Splitting results in a larger number of HTML files in the EPUB package, which can be helpful for breaking up long files and increasing the performance of eBook reading devices. TIP: Use this option to force page breaks in an eBook. Since a separate HTML file is created at each occurrence of the specified paragraph style, the eBook reading device is forced to load each file it encounters as a new page. As a result, the content is loaded at the top of the next page. The text to which the specified paragraph style is applied appears at the top of each HTML file.
Paragraph Style Name	A valid Paragraph Style Name		If you specified True in the row above, identify the paragraph style name you want to use to break the document up. NOTE: The default settings do not break a document at a paragraph style, so this cell is empty in the presets table.
Place Footnote After Paragraph	true false	false	Specify True to place footnotes after their associated paragraph. If you specify False, the footnotes are converted to endnotes, which appear at the very end of the publication. NOTE: The footnote reference numbers automatically become clickable hyperlinks in the EPUB file. The corresponding number in the footnote reference also becomes a clickable hyperlink that takes you back to the reference number. TIP: To format the footnote reference numbers in an EPUB file, you need to apply a character style to them in the InDesign document. This in turn creates a corresponding rule in the CSS file that determines how the reference numbers are formatted in the EPUB file. To automatically apply a character style to the reference numbers, choose Type > Document Footnote Options. In the Footnote Options dialog box, specify a character style in the Footnote Reference Number In Text section. You can also specify a paragraph style that's applied to the footnote text.
Remove Forced Line Breaks	true false	false	Specify True to remove all soft-returns in the exported eBook.
~ CSS Options			
CSS Options	Generate CSS Use Existing CSS File Style Names Only	Generate CSS	Cascading Style Sheets (CSS) are a collection of formatting rules that control the appearance of the contents of an HTML file. When you use CSS to format HTML content, you are separating content from presentation.

~Contents	Available Options	Default Value	Comments
Comments			The following three options are only considered if “Generate CSS” is specified in the row above.
Include Style Definitions	true false	true	Specify True to create a list of CSS styles (with attributes) that can be edited in the exported EPUB file. This is the quickest way to format the contents of an EPUB file.
preserveLocalOverrides	true false	true	If True is specified, local formatting such as italic or bold is included. NOTE: Enabling this option results in the generation of generic CSS rules. If your document has many style overrides, this can make the process of formatting an EPUB file quite complex and time consuming. To streamline the formatting process, apply character styles instead of relying on local formatting.
Include Embeddable Fonts	true false	true	Specify True to include all embeddable fonts in the EPUB file. NOTE: Fonts include embedding bits that determine if they are embeddable or not. Only OpenType and TrueType fonts can be embedded. PostScript fonts cannot be embedded within an EPUB file.
Use Existing CSS File Path	File path to external CSS file		This option only needs to be defined if Use Existing CSS File is specified in the CSS Options row above. Specify the file path of the existing CSS style sheet. NOTE: On OS X, you must use colons (:) for the separators in the file path. On Windows, you must use backslashes (\) for the separators. InDesign does not check whether the CSS exists or is valid, so you’ll want to confirm your CSS setup. TIP: To be sure you use the correct file path, manually export an EPUB file from InDesign. In the Contents category of the EPUB Export Options dialog box, specify the Use Existing CSS File option and then click Choose to locate a CSS file. After locating the file and clicking Open, copy the file path that’s inserted in the field. Paste the file path into the table in your template.

Step 3: Choosing an EPUB Preset for a Job Option in Typefi Publish

To run your newly configured EPUB Export Script, you must define your Job Option with your Typefi Publish Project. You may do this as follows:

- Within your Typefi Project, go to **Job Options**, and **Select> New** to create a new Job Option.
- Name your Job Option and select your options. If you are running your EPUB Export Script at BookEnd, be sure to select **Book** as your **InDesign Output Format**.
- Select and add the sections you want added to your EPUB.
- Under **Scripting Options**, select **Override Script Presets**
- Add the location of your 'Designer Scripts' at either book.end or document.end. If you have created a single EPUB folder as recommended earlier in the section titled 'EPUB Export Script', your script location should be as follows:
 - **OS X Server:** Scripts/EPUB/BookEnd.jsxbin or Scripts/EPUB/DocumentEnd.jsxbin
 - **Windows Server:** \Scripts\EPUB\BookEnd.jsxbin or \Scripts\EPUB\DocumentEnd.jsxbin

The EPUB Presets are stored within an InDesign Designer template. You may have more than one EPUB Preset stored in the Designer template. An EPUB Preset is specified in a job option's 'Script Arguments' box. Scroll to the bottom of the list of options. You should find a single-line text box labeled 'Script Arguments'. This is where you add the name of the EPUB Preset that you specified in 'Step 2: EPUB Export Table Options'. You also have to option to generate a log file to check for errors by adding the 'debug' instruction after the preset name.

Here is an example that would specify the EPUB Preset name 'ePub Textbook':

Script Arguments: EPUB Preset: ePub Textbook; debug

You may only specify one EPUB Preset per job option. If the EPUB Preset you specify in the Script Arguments does not exist in the Designer template used for this job option the default values for EPUB Export will be used.

Step 4: Generate your EPUB

Now that you have completed all the necessary steps to configure your EPUB Export you are ready to run your Typefi Publish Job Option which will create produce your EPUB, InDesign Document or Book, and PDF document (if selected in the Job Option).

To view your EPUB you must have software such as **Adobe Digital Editions**, **Calibre** or a number of other software applications. Wikipedia has a very comprehensive list of EPUB reading and editing software listed here: [Wikipedia EPUB](#).

Typefi Preferences

Typefi Designer adds five additional preference categories to InDesign's Preference dialog. To access Typefi preferences categories, select InDesign's Preferences from the Edit (Windows) or InDesign menu (OS X).

Most of the preferences affect the open document. If no document is open, the preferences are stored as InDesign application-wide default preferences that applied to 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 only when no document is open, 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 'Typefi Preferences'.

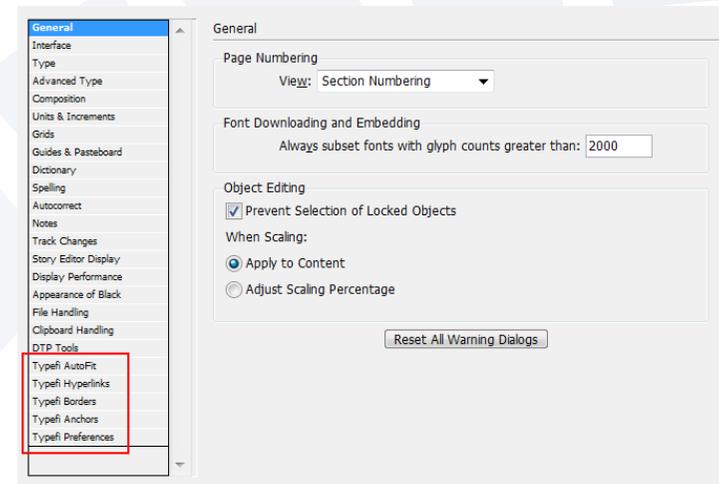
Typefi AutoFit

The *Typefi AutoFit* preferences ensure that AutoFit relationships and resize settings work dynamically. AutoFit is enabled by default (see [also "AutoFit tool" on page 11](#)).

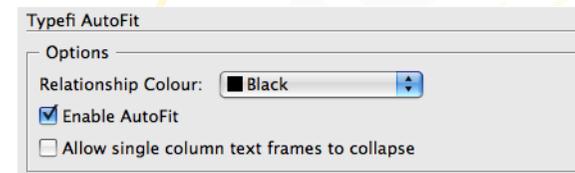
Disabling Typefi AutoFit means that AutoFit relationships and resize settings don't work interactively in the InDesign template. In addition, disabling the setting could prevent the proper handling of AutoFit relationships and resizing of frames during page-composition.

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



The extra Typefi preferences that appear in InDesign Preferences



InDesign Preferences > Typefi AutoFit.

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.

Typefi Hyperlinks

Cross-references are automatically hyperlinked. 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**, **Colour** and **Style** settings. The **Highlight** setting relates to the appearance of the link when the link is clicked. **Invert** will reverse the colours, **Outline** will display a stroked rectangle and **Inset** (see [screenshot](#)) will give the appearance of a button being pushed when the link is clicked.

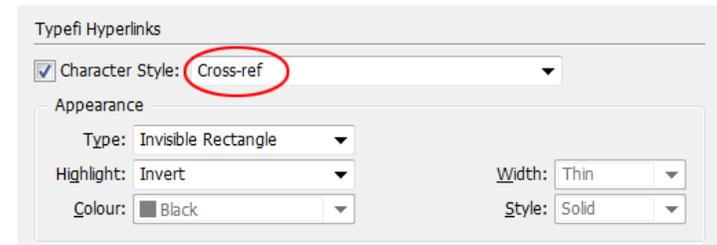
Typefi Borders

Typefi Borders are the visual appearance of Typefi Frames and Master Elements and Instances (see ["Master Element" on page 53](#)). Typefi frames are distinguished from InDesign frames through their border colour, 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.

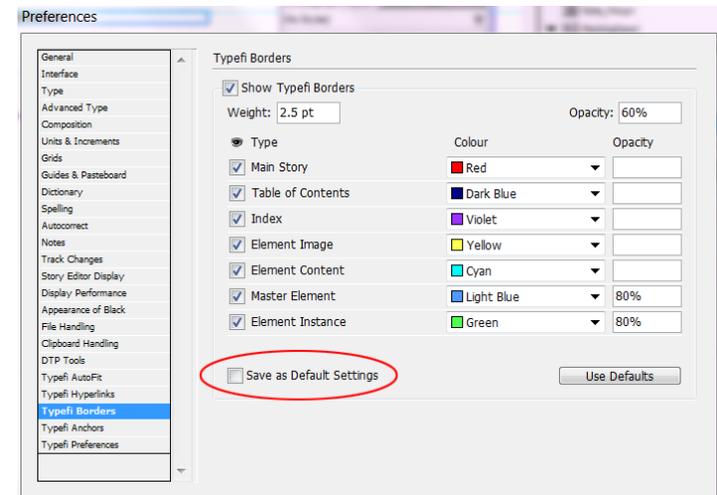


Choosing the Character Style for hyperlinks

Note: InDesign hyperlinks are not formatted by this feature.

I only two incidents of his
regarded as a premonition,

Rollover behaviour of a hyperlink set to **Inset**



InDesign Preferences > Typefi Borders, with a new choice to save the colour choices for all documents

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** 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 specify the default colours for borders in future Typefi templates:

- Choose the border weight, colours, and opacity you prefer
- Enable the **Save as Default Settings** choice (see [previous screenshot](#))

To reset the Typefi Border appearances to their default stroke weight, opacity and colour:

- Choose InDesign **Preferences > Typefi Borders**
- Click **Use Defaults**.

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 colour, and weight of the lines and markers.

To edit the colour of the Anchor markers:

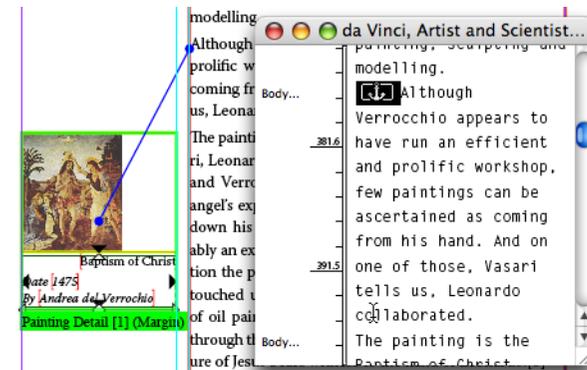
- Click the colour drop-down
- Pick a colour from the list

Marker and Line stroke weight and opacity of colour 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.

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 Element and Anchor line and marker and its appearance in Story Editor.

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, and which 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:

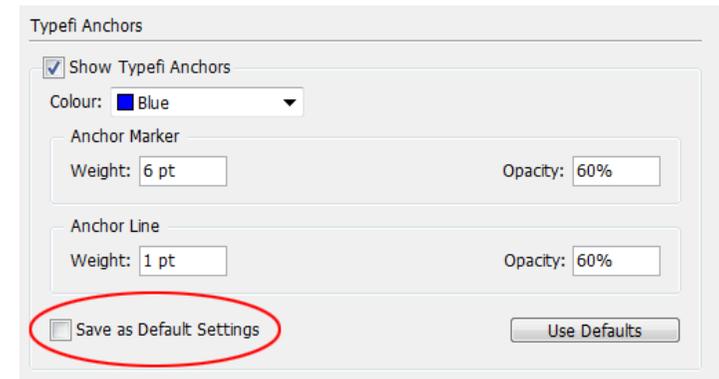
- Click **Save as Default Settings**

To restore the Typefi Anchor preferences to their original settings:

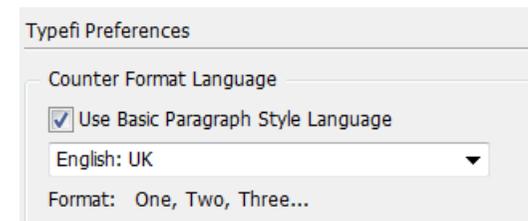
- Click **Use Defaults**

Typefi Preferences

The *Typefi Preferences* contain settings for Counter Format Language.



InDesign Preferences > Typefi Anchors.



InDesign Preferences > Typefi Preferences

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.

Please refer to **Typefi Publish 6 Writer User Guide** to learn how to create test content. Refer to **Typefi Publish 6 Server User Guide** to learn how to create **Job Options**.