

Typefi® Publish 6

Writer 6 User Guide

July 2013



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Version 6.0.4



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Introducing Typefi Writer

Typefi Writer is an add-in for Microsoft Word that makes it easy for you to create structured content for the Typefi Publish system using Microsoft Word. It allows you to use professional layouts from Adobe InDesign, and apply them to Microsoft Word documents without the need to understand XML (Extensible Markup Language) or Adobe InDesign. And with just a couple of clicks, you can convert a Word document to PDF format to see what the publication will look like in its final form.

Typefi Writer works by attaching a Typefi Project to a Word document. A Typefi Project contains paragraph and character styles, sections, elements, tables and more. Once a project is attached, you use Typefi Writer to apply simple markup to your document to identify different parts of the publication.

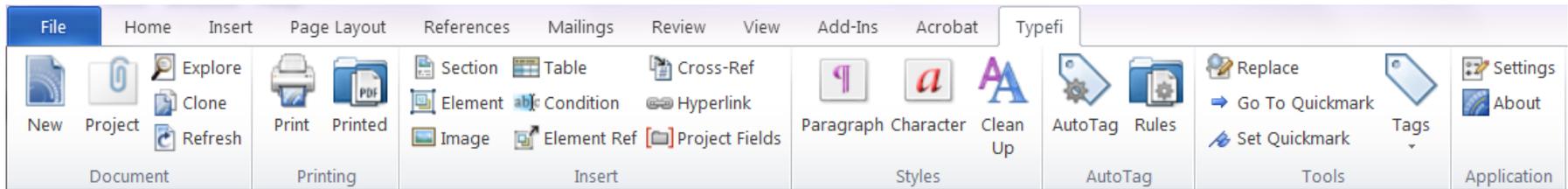
A Typefi Writer document in Microsoft Word is not formatted like the final publication, but by using the Typefi Print command, you can generate a PDF file to see exactly how the final product will look.

You may format the styles in Word to look close to the final product (font, colour, size, spacing, etc.), but it is not necessary. Avoid manually entering numbers, bullets, and similar content, since the InDesign template may add these automatically as part of the paragraph styles.

In some cases, it is easier to create manual numbering in Word and allow this numbering to pass through into the Typefi template. This may reduce the number of paragraph styles required, which is desirable.

Typefi Tab

The Typefi tab provides easy access to most Typefi Writer commands and appears as a tab in the Word Ribbon at the top of the screen.



Typefi Writer Tools now have their own tab (button names and descriptions below) in Microsoft Word

The Typefi tab provides one-click access to commands, and contains seven sections:

- Document
- Printing
- Insert
- Styles
- AutoTag
- Tools
- Application

Document Section

This section of the Typefi tab contains five buttons:

New – creates a Typefi document attached to a project of your choice (see [page 29](#))

Project – specifies the project to which the document is attached (see [page 28](#))

Explore – examines the current document using Typefi Explorer (see [page 69](#))

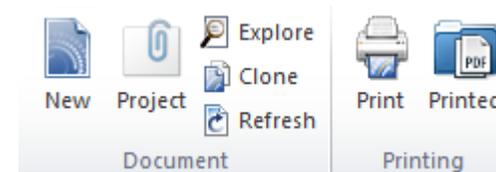
Refresh – performs clean-up operations on the current document (see [page 68](#))

Printing Section

This section of the tab contains:

Print – prints the current document using the Typefi process

Printed – opens the location of the Typefi output documents



The Document section and the Printing section of the Typefi tab

Insert Section

This section of the tab contains:

Section – inserts a Typefi section (see [page 32](#))

Element – inserts a Typefi element (see [page 59](#))

Image – inserts a Typefi image (see [page 56](#))

Table – inserts a Typefi table (see [page 41](#))

Condition – marks content with a Typefi condition (see [page 54](#))

Element Reference – inserts a Typefi element reference (see [page 61](#))

Cross-Reference – inserts a Typefi cross-reference (see [page 49](#))

Hyperlink – inserts a Typefi hyperlink (see [page 46](#))

Project Fields – inserts a Typefi project field (see [page 73](#))

Styles Sections

This section of the tab contains:

Paragraph – apply a Typefi paragraph style to a selected paragraph (see [page 36](#))

Character – apply a Typefi character style to selected text (see [page 38](#))

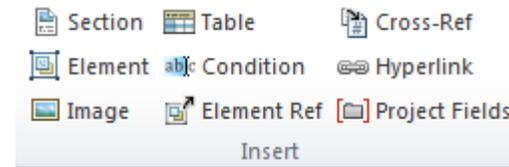
Clean Up – remove unused paragraph and character styles that are not associated with the attached Typefi project (see [page 40](#))

AutoTag Section

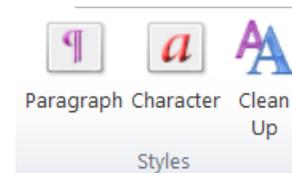
This section is new in version 6. It introduces automation to the process of ‘tagging’ content with Typefi paragraph styles:

AutoTag – opens the dialog in which the XML Rules document is specified, and the rules applied (see [page 10](#))

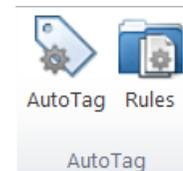
Rules – opens a dialog for easy access to rules files



The Insert section of the Typefi tab



The Styles section of the Typefi tab



The AutoTag section of the Typefi tab

Tools Section

This section of the tab contains:

Replace – opens a dialog in which one Typefi item may be replaced by another of the same type (see [page 70](#))

Go To Quickmark – jumps to the location in the document marked by **Set Quickmark**

Set Quickmark – creates a location in the document for quick access during editing

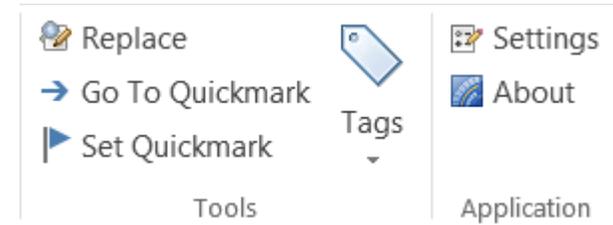
Tags – opens a list of options concerning Typefi tags (see [page 66](#))

Application Section

This section of the tab contains:

Settings – opens a dialog containing choices about servers, viewing options, save options, and file locations (see [page 5](#))

About – brings up information about the version of Typefi Publish you are using.



The Tools and Application sections of the Typefi tab

Typefi Writer Settings

The Typefi Writer Settings dialog allows you to control various settings for the Typefi Writer Add-in. You can create a connection to the Typefi Publish Server; choose whether compatible images will appear in the Word file or not; choose Save options; choose a storage location for PDFs published from Word; and specify the folder where Typefi AutoTag rules are located.

To access Typefi Writer Settings, click the **Settings** button  in the Typefi tab. The Typefi Writer Settings dialog appears (see [screenshot](#)).

Servers

The Servers Tab in the Typefi Writer Settings dialog is used to:

- manage connections to the Typefi Publish Server
- define the server response timeout
- choose whether projects may be selected from Typefi Style Sheet files

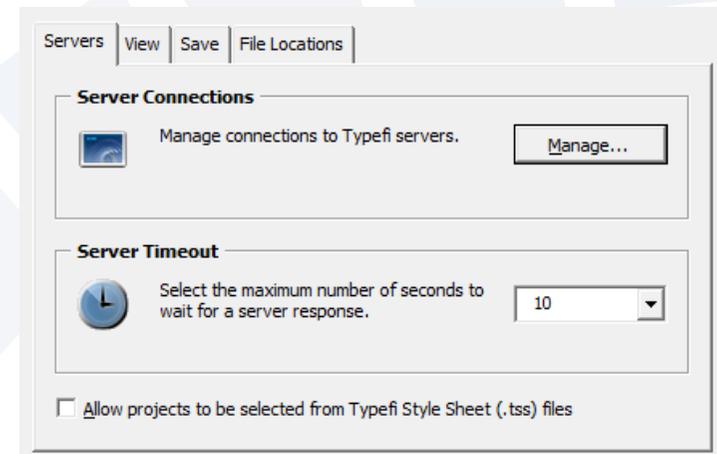
Server Connections

Server Connections are used whenever the Writer needs to exchange information with Typefi Publish Server, unless you are working in an off-line environment (see ["Selecting a Project from a TSS File" on page 29](#)).

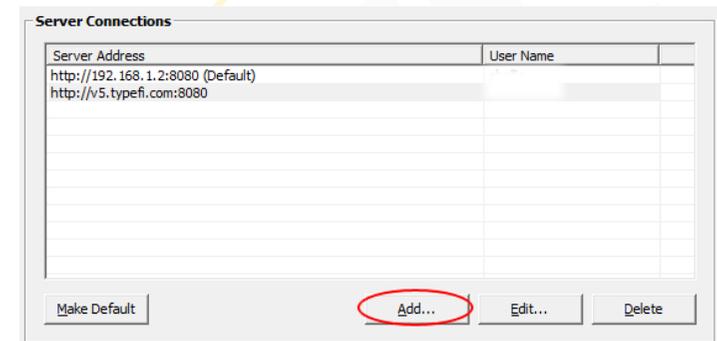
Adding a Server Connection

When you want to add a new Server Connection to the Writer:

- Click the **Settings** icon  in the Typefi tab
- Click **Manage...** in the Typefi Writer Settings dialog
- Click **Add...** (see [screenshot](#))



Typefi Writer Settings – manage Server Connections and choose Server Timeout



Adding another server to the list of available Typefi Publish servers.

- Enter the URL (http://servername:8080) (where **servername** is the name of your server) for the Server Address, and the username and password used to sign in to the server
- Enable **Remember my password** to ensure that the Writer does not prompt you to re-enter your password each time you connect to the Typefi Publish Server
- Click **Test** to verify that the Server Connection is working
- Click **OK** to add the new Server Connection to the connections list

Default Connection

The **default connection** is the preferred connection Typefi Writer uses when you launch Word. With the **Remember my password** option enabled for the default connection, connection to the Typefi Publish Server connection happens without prompts. The current default connection shows the word (Default) after the Server Address.

To set the Default Connection:

- Select a connection in the Manage Server Connections dialog
- Click the **Make Default** button

Once the Server connections are in place:

- Click **Close** to return to the Typefi Writer Settings dialog
- Click **Close** to close the Typefi Writer Settings dialog and finish managing Server Connections.

Editing a Server Connection

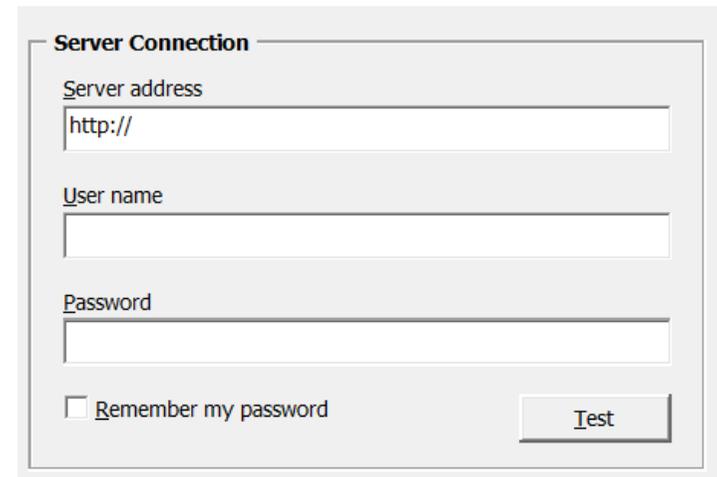
You can edit the server address, usernames, and passwords after a Server Connection has been added. In cases where the Server Address must be edited, you must delete the Server Connection and add a new Server Connection.

To edit a Server Connection:

- Click the **Settings** icon  in the Typefi tab
- Click **Manage...** in the Typefi Writer Settings dialog
- Select the connection you want to edit and click **Edit...**
- Make changes to the username or password
- Click **Test** to verify that the Server Connection is working.
- Click **OK**
- Click **Close** to return to the Typefi Writer Settings dialog
- Click **Close** to close the Typefi Writer Settings dialog and finish editing Server Connections

Deleting a Server Connection

You can delete Server Connections that become out-dated or unused.



Server Connection

Server address
http://

User name

Password

Remember my password

Test

Adding a connection to a Typefi Publish Server

To delete a Server Connection:

- Click the **Settings** icon  in the Typefi tab
- Click **Manage...** in the Typefi Writer Settings dialog and select the server to delete
- Click **Delete**
- Click **Yes** to delete the connection, or click **No** to retain it and return to Manage Server Connections window
- Click **Close** to return to the Typefi Writer Settings dialog
- Click **Close** to close the Typefi Writer Settings dialog and finish managing Server Connections

Server Timeout

The **Server Timeout** setting controls the number of seconds that the Writer will attempt to connect to a server before a timeout occurs. For instance, if you are setting up a new server connection and you click the Test button, Writer will attempt to access the server for the specified number of seconds. If the server does not respond in time, a timeout error appears.

To set the maximum number of seconds to wait for a server response, enter the desired number (in seconds) or choose a number from the pop-up menu. The minimum timeout is 2 seconds, and the maximum timeout is 30 seconds.

Typefi Style Sheet (.TSS)

The Typefi Style Sheet (TSS) is an XML file that describes properties of a Typefi project. Typefi Writer needs a TSS file to populate its dialog boxes and to make decisions while working with a Typefi project.

Note: In a normal environment where a connection to a Typefi Publish server is available, TSS files are handled automatically; as projects are selected on a server, Typefi Writer reads information from a corresponding TSS file.

In an offline environment where a project cannot be selected from a server, a TSS file can be used as an alternate way of selecting Typefi projects.

To allow projects to be selected from TSS files:

- Click the **Settings** icon  in the Typefi tab
- Click the **Servers** tab
- Enable **Allow projects to be selected from Typefi Style Sheet (.TSS) files** by clicking in the checkbox
- Click **Close**

View

Document Images

If you have this setting enabled, Typefi Writer will show previews of Typefi images in Word documents – if the file name is found, and if the file type is compatible with Microsoft Word. If the file name cannot be located, or if the file type is not compatible with Microsoft Word (e.g. Photoshop, Illustrator, PDFs), the Writer will display the file name instead of the image.

Images will display in Print Layout mode, but not in Draft or Outline mode (unless the document is saved as Word 97-2003, then as RTF again). This change was introduced by Microsoft in Word 2010.

If you have this setting **disabled**, Writer will only display the file name of linked images.

Since enabling this option may increase the amount of time it takes to manipulate some Writer documents, you should keep this option disabled if you want to maximize speed. (It also increases the file size of the RTF documents).

To show image previews in Word:

- Click the **Settings** button  in the Typefi tab
- Click **View** tab
- Enable **Show image previews**
- Click **Close**

To hide image previews in Word:

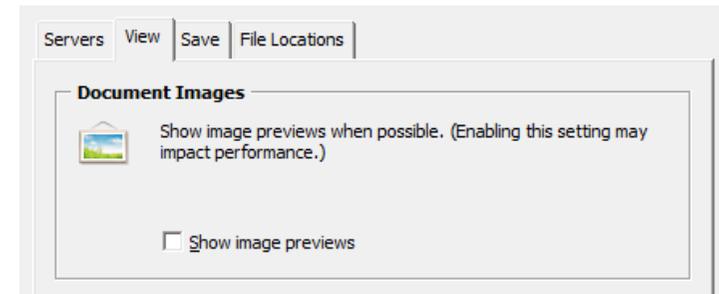
- Click the **Settings** button  in the Typefi tab
- Click **View** Tab
- Disable **Show document images**
- Click **Close**

Image file formats

Typefi Writer will only attempt to display images whose file names have one of the following extensions:

eps, gif, gfa, jpg, jpeg, jfif, jpe, tif, tiff, bmp, dib, rle, bmz, pct, pict, png, emf, wmf.

An issue has been identified with images containing transparency – InDesign will slightly embolden the text on a page containing such images. It does not impact pagination, but it makes a visible difference to pages without such images. ‘Flattening’ the images resolves the problem.



Typefi Writer Settings – the choice to view images in place (but only those supported by Word).

Though any file name can be specified, it is recommended that you insert only file formats that are supported by Typefi Publish, which uses Adobe InDesign Server as part of its automated publishing solution. Adobe InDesign supports the following additional file formats that are not supported by Microsoft Word:

- Portable Document Format (.pdf)
- Photoshop document (.psd; .pdd)
- Illustrator document (.ai)
- InDesign document (.indd)

and some less common formats: .ct, .trp, .dcs, .pmg and .pcx.

Other Media Formats

InDesign further adds support for interactive, movie and sound files in the following formats:

- Sound (.aiff, .au, .wav)
- Video (.avi, .mpeg, .mov, .swf)

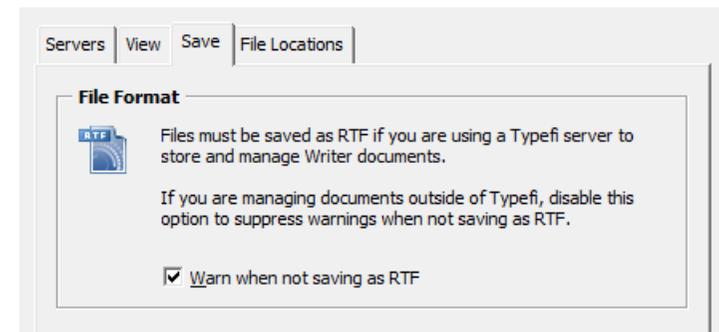
In order to locate these other file types, the filter in the Select Image dialog must be changed from 'All Images' to 'All Files', since the formats are not included in the Images listing.

Although Typefi supports the inclusion of these file-formats with the Typefi Writer, there is no support for further defining interactive options for these media formats, and producing an 'interactive' PDF requires a script to be installed on the server.

Defining the behaviour (e.g. Looping) of various media types such as video clips may be done in the post-production stage by opening the InDesign file produced by Typefi Publish, and setting the required behaviour manually.

Save

This section of the Typefi Writer Settings dialog is provided to avoid the problems associated with using the Word .docx (or .doc) format. As the dialog explains, Word documents that are **uploaded to a Typefi server** must be RTF (Rich Text Format) for the process to work properly. (Older Word files were converted to RTF automatically, but retained the DOC extension, to avoid worrying those unfamiliar with the format). **But it is not necessary if the Word files are remaining where they are.** Therefore, the setting only 'warns' you to use the format.



The Save settings dialog that warns users if they are not saving files as RTF

File Locations

Print Output Folder

The Print Output Folder is the folder where the PDF files are saved when you use the Typefi **Print** command. You can have the folder on your local machine or on a server.

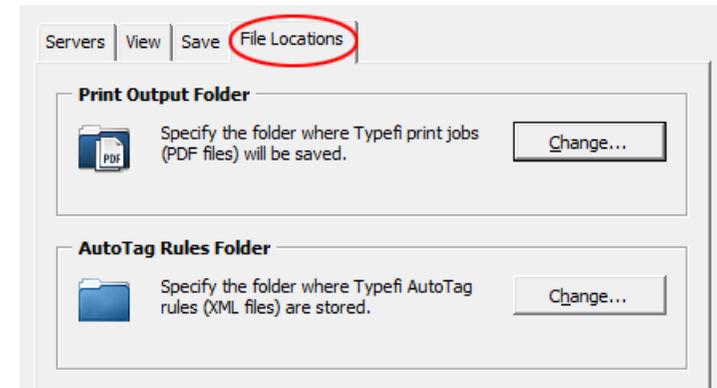
The folder location can be affected by your local computer account settings and network settings. Consult with your Network Administrator in cases where you can't select the desired output folder.

To define the Print Output Folder:

- Click the **Settings** button  in the Typefi tab
- Choose the File Locations tab (see [screenshot](#))
- Click the **Change...** button in the Print Output Folder area
- Click **Browse...** and navigate to the folder where you want to store the files
- Once inside the folder, click **Select**
- Click **OK** then **Close**.

AutoTag Rules Folder

You can set the location of the AutoTag Rules document here. This means that you can quickly get to the folder in Windows Explorer or Finder by clicking on the Rules button  in the AutoTag section of the Typefi Tab. Then you can open the Rules document and make any necessary changes.



Setting the locations of both the output PDFs and the AutoTag Rules documents

Preparing Word Documents

Many improvements can be made to a Word document before any Typefi markup is added. To make the document suitable for processing, check that the document has: consistent use of varied paragraph styles; correct heading levels; minimal use of manual over-rides to character and paragraph formatting; no embedded images; and no Tables of Contents...

It is common to break long Word documents into 'sections' in order to have different layouts; have different headers and footers; or to allow different column layouts. Typefi Sections serve a similar function...

Sections and Page Breaks

Sections are generally used in Word documents to distinguish unique parts of a publication. Typefi Publish also uses the concept of sections. Where you have inserted Word sections in a document you will probably replace them with a Typefi Writer section. Word page breaks are not converted to the equivalent in Typefi Publish, so you should remove them from the document. (Paragraph styles that have pagination settings such as 'top of column' or 'top of page' should be created by the template designer instead).

Word styles (such as headings) may be set to start at the top of a page if that helps the editing process, but it will have no impact on the final output.

Formatting Text

A conventional Word document that is prepared correctly will make use of paragraph and character styles as way of applying consistent and predictable text formatting. If you use a variety of such styles, then 'mapping' them to Typefi styles (assigning each style correctly) becomes a much easier task. A good approach is to use Word templates that contain identical style names to the Typefi styles in the related InDesign template. Writing the

SECTION: Chapter

S_ChapterTitle: Preparing Word documents for Typefi
Section_Listing: 4.Writer.2010.03.PreppingDocs

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Word styles (such as headings) may be set to start at the top of a page if that helps the editing process, but it will have no impact on the final output.

Formatting Text

A conventional Word document that is prepared correctly will make use of paragraph and character styles as way of applying consistent and predictable text formatting. If you use a *The Word document used to produce this User Guide...*

document using just those styles means that no conversion for text formatting is required when the document is turned into a Typefi content file.

Tabs

When you insert tabs to align text in columns, ensure that only one tab character is inserted, and use the Ruler in Word to define tab types and positions. The reason for this is that multiple tabs will transfer through to the InDesign template, and will cause the alignment to be incorrect. Remember, it doesn't matter what it looks like in Word!

Tab positions must also be set by the production designer for the selected paragraph styles in the InDesign templates, otherwise the text will not align correctly.

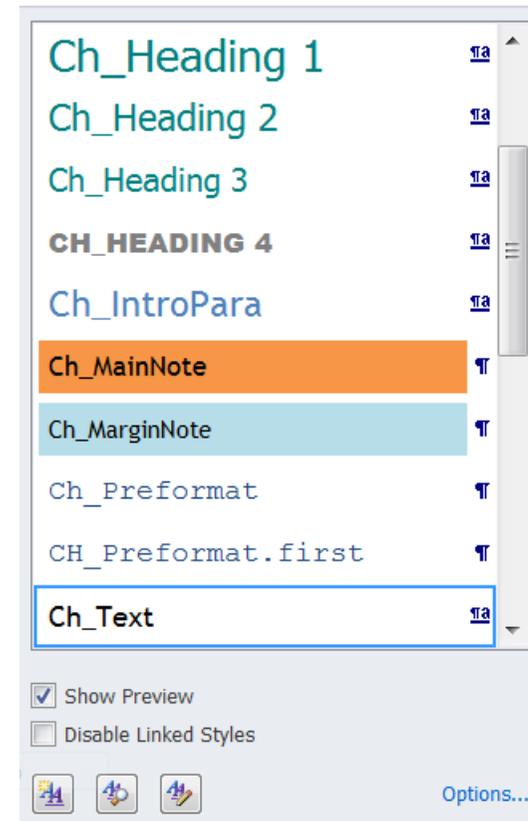
Special Characters

Typefi Publish has full Unicode character support, which means that all of the Special Characters you insert in Word are fully supported and retained. The one exception is the No-Width Non Break character, which has no support in InDesign.

Symbols

You must be careful when inserting symbols (such as icons) as part of your text. There is no guarantee that the font you are using in Word is the same font that is used during page composition in InDesign. If there are a large number of icons you'd like to be able to insert as part of your text, then consider developing a special icons-only font, linked to a character style, that's installed both on your computer and the Typefi Publish Server (or the computer where InDesign Server is installed if it is a different computer) and incorporated in the InDesign template created by the production designer.

Microsoft Word uses the Symbol font for many symbols that are inserted into documents, but there are different versions of Symbol – TrueType and OpenType for instance – and you must have exactly the same font installed on the Typefi server. Other symbol fonts such as WingDings and WebDings have the same problem of multiple versions.



Microsoft Word Paragraph Styles window showing some examples of Typefi Paragraph and Character Style Names

AutoTag

Description

This tool allows you to automate some of the Typefi markup process for a Word document. It uses a **rules file** to specify actions to be performed on target paragraphs within the active document.

This means that a standard Word document that **conforms to precise standards** of paragraph styles and other content can be automatically converted into a Typefi content file with all the required markup and elements in place. After checking that all is valid, it can be printed using the relevant Job Option.

It avoids the problems associated with incorrect markup due to user error or lack of information, and greatly speeds up the whole process.

Prerequisites

Typefi Writer must be installed.

An XML rules file must be provided that instructs the AutoTag tool how to markup the document. This file should be located in:

`C:/Users/[username]/Documents/Typefi/Writer/AutoTag Rules/`

The active document must already be associated with a Typefi Project before running the AutoTag tool. Otherwise an error dialog appears.

Running AutoTag

AutoTag processes the active Word document. This document must already be attached to a Typefi Project.

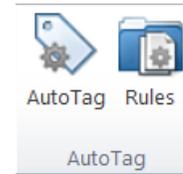
- Click the AutoTag icon  to display the AutoTag dialog
- Choose your Rule file by clicking the **Browse** button next to the **Rules file** area
- Then click **Execute** to process the active document.

Action information will be displayed in the Conversion Log. After dismissing the alert that appears to announce the completion of the process, click **Close** to dismiss the dialog.

Rule File Format

The rule file is XML that describes a series of paragraph style patterns and, for each pattern, a collection of actions to be performed.

Preparing Word Documents

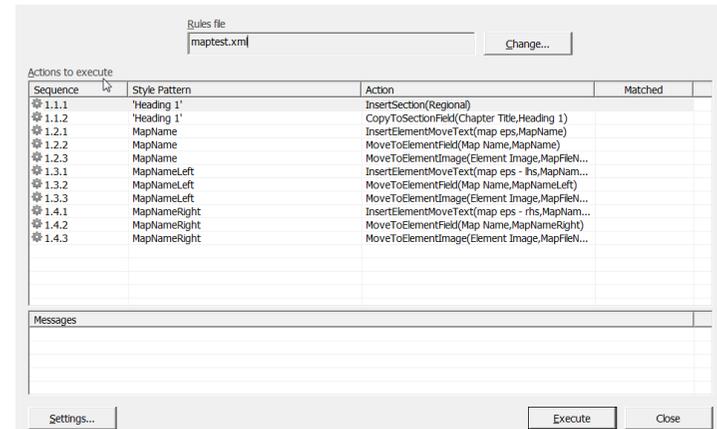


The new AutoTag and AutoTag Rules buttons in the Typefi panel

Document must be attached to a Typefi project before running AutoTag.



Error that appears if the document is not yet associated with a Typefi Project



The AutoTag Dialog showing the rules that will be executed and the actions involved

The basic structure is:

```
<rules description="Type a description here if desired.">
  <pass>
    <style pattern="StyleName" quantifiers="{1}">
      <actions>
        <action></action>
        <action></action>
      </actions>
    </style>
    <style pattern="StyleName" quantifiers="{1,}">
      <actions>
        <action></action>
        <action></action>
      </actions>
    </style>
  </pass>
</rules>
```

AutoTag supports the ability to add descriptions to Rules files. To do so, just add the description to the `<rules>` node, like this: `<rules description="This is my description.">` The description is visible whenever the user selects a Rules file in the UI.

<pass>

In older versions of AutoTag, the `<pass>` element could appear multiple times in a rule file to handle multiple passes through a document. For example, the conditioning of paragraphs could be handled in a first pass and then all other processing could be done in a second pass. In the current version of AutoTag, the `<pass>` element is no longer used in this way. Each individual `<action>` element is now considered a “pass” on the document. The `<pass>` element is still required for compatibility purposes, but only one `<pass>` element is needed in the XML file. Older AutoTag files that contain multiple `<pass>` elements will still work, but they will not change the way a document is processed.

<style>

Eg: `<style pattern="Style1 Style2" quantifiers="{1}{1,}" [firstMatchOnly="true|false"]>`

The `<style>` element is used to specify paragraph style patterns to find in a document. When AutoTag finds a style pattern, it executes actions on the area of the document where the style pattern is found.

Attributes

PATTERN

The “pattern” attribute is used to specify paragraph styles to find in a specific order. Multiple style names are separated with spaces. For example, PN PT will match a PN styled paragraph that precedes a PT styled paragraph. Style names are case sensitive. Style names that contain spaces must be surrounded by quotes (single or double). The OR operator, |, can also be used to separate style names. OR has a higher precedence than the space operator (which can be thought of as an AND operator). For example: FMH|BMH CT will match a paragraph styled with FMH or BMH preceding a CT styled paragraph.

Example pattern values:

```
pattern="PN"  
pattern="PN PT"  
pattern="FMH|BMH CT"  
pattern="'Heading 1' 'Heading 2'"
```

QUANTIFIERS

The “quantifiers” attribute is used to specify the number of each style in a pattern to find. You can specify an exact number or a range of numbers. For example,

{2} means “find exactly two occurrences of a paragraph style”

{1,} means “find one or more occurrences of a paragraph style”

{1,3} means “find one to three occurrences of a paragraph style”

Each style name specified in a pattern requires its own quantifier. For example, the pattern “PN PT” requires two quantifiers: one for PN, and one for PT (for example, “{1}{2}”). Each quantifier must be surrounded by curly braces. Style names with OR operators | between them only need one quantifier. For example, the style pattern “PN|PR PT” requires two quantifiers: one for PN|PR, and one for PT.

Example pattern and quantifier values:

```
pattern="PN" quantifiers="{1}"  
pattern="PN PT" quantifiers="{1}{1,}"  
pattern="FMH|BMH CT" quantifiers="{2,}{1}"  
pattern="'Heading 1' 'Heading 2'" quantifiers="{1}{1}"  
pattern="Apple Orange Lemon" quantifiers="{1}{1}{1,}"
```

FIRSTMATCHONLY

“FirstMatchOnly” is an optional attribute whose default value is ‘false’. If ‘true’, the style pattern is only matched one time in the document, regardless of the number of ‘OR’ operators. If you need to process the first occurrence of multiple styles in the same way, you will need to declare multiple <style> rules.

All XML element and attribute names are case sensitive, but the contents of XML elements are NOT case sensitive.

For example, this is a perfectly valid entry:

```
<action>SeTsEcTiOnFiEID(fieldname, FIELDVALUE)</action>
```

but this is not (Action in wrong case):

```
<Action>SetSectionField(FieldName, FieldValue)</Action>
```

Expressed another way:

```
<casesensitive>NotCaseSensitive</casesensitive>
```

Actions

ApplyCondition

DESCRIPTION

Surrounds the target paragraph(s) with a Typefi condition. The condition must be defined in the Typefi project attached to the document.

PARAMETERS

Name	Required	Description
Condition Name	Yes	Name of condition to apply.

EXAMPLE

```
<action>ApplyCondition(Omit)</action>
```

ChangeParaStyle

DESCRIPTION

Applies a paragraph style to the target paragraph(s).

PARAMETERS

Name	Required	Description
Style Name	Yes	Name of paragraph style to apply (case-sensitive).

EXAMPLE

```
<action>ChangeParaStyle(GiantBlinkingText)</action>
```

ConvertTable

DESCRIPTION

Converts a Microsoft Word table into a Typefi table. The table must be defined in the Typefi project attached to the document. The first cell of the Word table must contain the paragraph style specified in the rule pattern. Optional parameters may be omitted. The Table Style is the only required parameter, so the minimum action statement would be:

```
<action>ConvertTable(MyTable)</action>
```

To specify the Writer default for a value, leave that parameter empty. For example, to specify a table style and use the default values for 'Number of header rows', 'Number of footer rows', 'Keep proportional column widths', 'Keep Vertical Align', but keep 'Horizontal alignment' you would use:

```
<action>ConvertTable(MyTable,,,,,true)</action>
```

PARAMETERS

Name	Required	Description
Table Style	Yes	Name of Typefi table style.
Number of header rows	No	Number of rows in table to treat as header rows.
Number of footer rows	No	Number of rows in table to treat as footer rows.
Keep proportional column widths	No	true or false – indicates if relative cell widths will be retained in InDesign.
Keep vertical alignment	No	true or false – indicates if relative cell widths will be retained in InDesign.

Name	Required	Description
Keep horizontal alignment	No	true or false – indicates if vertical alignment should be retained in InDesign.
Body row paragraph style	No	Name of paragraph style to apply to body rows (case-sensitive).
Header row paragraph style	No	Name of paragraph style to apply to header rows (case-sensitive).
Footer row paragraph style	No	Name of paragraph style to apply to footer rows (case-sensitive).

EXAMPLE

```
<action>
  ConvertTable(Salary Table, 2, 1, true, true, false)
</action>
<action>ConvertTable(Basic Table_50)</action>
<action>
  <!--
    1 header row
    No footer rows
    keep cell widths
    keep valign
    keep haligh
  -->
  ConvertTable(Basic Table_50,1,,true,false,false)
</action>
```

CopyBookmarkToElementField

DESCRIPTION

Copies text contained by a Microsoft Word bookmark into an element-level field of the first element that occurs before the target paragraph(s).

PARAMETERS

Name	Required	Description
Field Name	Yes	Name of element field that will receive the text.
Bookmark Name	Yes	Name of Microsoft Word bookmark that contains the field text.

EXAMPLE

```
<action>CopyBookmarkToElementField(Publication Year, PubYear)</action>
```

Copies the text contained by a Word bookmark named 'PubYear' into the element field named 'Publication Year' of the first element that occurs before the target paragraph(s).

CopyBookmarkToSectionField

DESCRIPTION

Copies text contained by a Microsoft Word bookmark into a section-level field of the section containing the target paragraph(s).

PARAMETERS

Name	Required	Description
Field Name	Yes	Name of section field that will receive the text.
Bookmark Name	Yes	Name of Microsoft Word bookmark that contains the field text.

EXAMPLE

```
<action>CopyBookmarkToSectionField(Publication Year, PubYear)</action>
```

Copies the text contained by a Word bookmark named 'PubYear' into the section field named 'Publication Year' of the section containing the target paragraph(s).

CopyToElementField

MoveToElementField

DESCRIPTION

Copies or moves text from the target paragraph(s) into an element-level field of the first element that occurs before the target paragraph(s).

PARAMETERS

Name	Required	Description
Field Name	Yes	Name of element field that will receive the text.

Name	Required	Description
Paragraph Style	Yes	Style of paragraph to copy or move into element field (case-sensitive).

EXAMPLE

```
<action>CopyToElementField(Photo Name, Photo)</action>
```

This copies the first paragraph with style 'Photo' into the element field named 'Photo Name' of the first element that occurs before the target paragraph(s).

CopyToElementImage

MoveToElementImage

DESCRIPTION

Copies or moves the text of the target paragraph into the image path of the first element that occurs before the target paragraph. The element must have an image field. If there is no image field, nothing will happen. The image path can be manipulated through the use of a regular expression (RE). The RE specifies what parts of the path are to be kept and what parts are to be replaced.

PARAMETERS

Name	Required	Description
Paragraph Style	Yes	Style of paragraph whose text will be copied to the image path (case-sensitive).
Match Regular Expression	No	Defines how to parse the image path.
Replace Regular Expression	Yes if Match Regular Expression exists	This is a regular expression used to format the path when filling in the element image field.
Match File Name Only	No	true false – Whether or not to match just the file name portion of the path. This simplifies the regular expressions if you don't require the full image path.

EXAMPLE

```
<action>CopyToElementImage(Note, (\\w\\w\\w\\w)(\\w+\\.\\w+)$, O:\\Draw\\Eps\\$1\\$1$2, true)</action>
```

Since the backslash character is used to 'escape' characters within the action command, it must itself be 'escaped' so that it can be used. Basically, wherever you use a backslash in a regular expression, you must use 2 backslashes.

More information on regular expressions can be found here: <http://msdn.microsoft.com/en-us/library/6wzad2b2.aspx> and here: <http://www.regular-expressions.info/vbscript.html>

CopyToSectionField

MoveToSectionField

DESCRIPTION

Copies or moves text from the target paragraph(s) into a section-level field of the section containing the target paragraph(s).

PARAMETERS

Name	Required	Description
Field Name	Yes	Name of section field that will receive the text.
Paragraph Style	Yes	Style of paragraph to copy or move into section field (case-sensitive).

EXAMPLE

```
<action>CopyToSectionField(Copyright Notice, Copyright)</action>
```

This copies the first paragraph with style 'Copyright' into the section field named 'Copyright Notice' of the current section.

Delete

DESCRIPTION

Deletes the target paragraph(s).

PARAMETERS

None

EXAMPLE

```
<action>Delete()</action>
```

InsertElement

DESCRIPTION

Inserts a Typefi element before the target paragraph(s). The element must be defined in the Typefi project attached to the document.

PARAMETERS

Name	Required	Description
Element Name	Yes	Name of element to insert. A variant can be specified by following the element name with a '.' and the variant name. For example, Sidebar.ShortBox

EXAMPLE

```
<action>InsertElement(Sidebar)</action>
```

Inserts an element 'Sidebar'.

InsertElementCopyText

InsertElementMoveText

DESCRIPTION

Inserts an element before the target paragraph(s) and copies or moves paragraphs into the content area of the element. For nested elements, this will insert the text in the topmost element.

PARAMETERS

Name	Required	Description
Element Name	Yes	Name of element to insert. A variant can be specified by following the element name with a '.' and the variant name. For example, Sidebar.ShortBox
Paragraph Styles	Yes	Paragraphs to move into the element. There must be at least 1 paragraph style specified. Multiple paragraphs can be defined by separating them with a comma. The text from the paragraphs will be moved into the element in the order they occur in the document.

EXAMPLE

```
<action>InsertElementMoveText(Sidebar,Credit,SB,SBFooter)</action>
```

Inserts an element 'Sidebar' and then looks for target paragraphs with styles Credit, SB or SBFooter and copies or moves their text into the element.

InsertSection

DESCRIPTION

Inserts a Typefi section before the target paragraph(s). The section must be defined in the Typefi project attached to the document.

PARAMETERS

Name	Required	Description
Section Name	Yes	Name of section to insert.

EXAMPLE

```
<action>InsertSection(ChapterTitle)</action>
```

Inserts section 'ChapterTitle'.

SetElementField

DESCRIPTION

Sets the text of an element-level field of the first element that occurs before the target paragraph(s).

PARAMETERS

Name	Required	Description
Field Name	Yes	Name of element field that will receive the text.
Field Text	Yes	Text that will be applied to the element field.

EXAMPLE

```
<action>SetElementField(Publication Year, 1967)</action>
```

Sets the text '1967' as the field value for the element field named 'Publication Year'.

SetSectionField

DESCRIPTION

Sets the text of a section-level field of the section containing the target paragraph(s).

PARAMETERS

Name	Required	Description
Field Name	Yes	Name of section field that will receive the text.
Field Text	Yes	Text that will be applied to the section field.

EXAMPLE

```
<action>SetSectionField(Publication Year, 1967)</action>
```

Sets the text '1967' as the field value for the section field named 'Publication Year'.

Hyperlinks

Word automatically converts e-mail addresses and web-links to hyperlinks. These hyperlinks are retained during Typefi's page-composition process, and can become interactive hyperlinks in a PDF if the specified Job Option uses PDF Settings that retain these hyperlinks. **Word hyperlinks to bookmarks or document locations are not maintained during page composition.**

Bookmarks

Bookmarks are generally used as a document navigation tool in Word. They can be inserted as empty anchors or around some text that is highlighted. Word bookmarks convert to InDesign bookmarks or PDF Bookmarks during page-composition. In addition, Word bookmarks can be used by Typefi's Cross-References and Hyperlinks as destinations, bearing in mind that bookmark names can only be a single word.

Footnotes

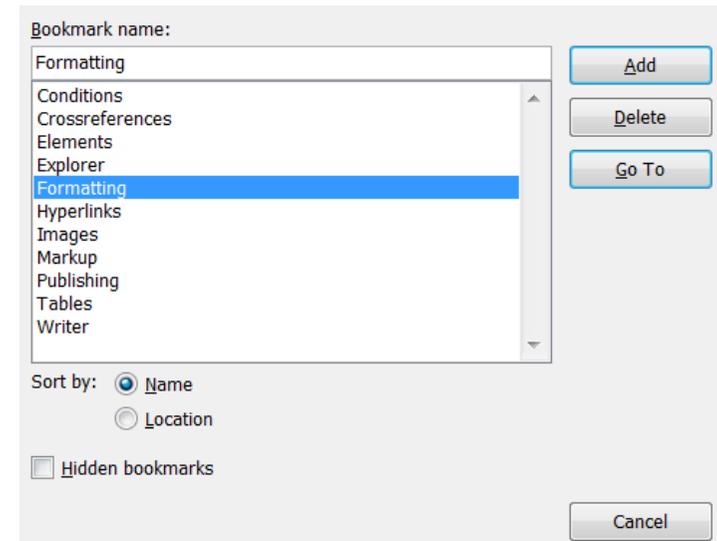
Word footnotes are automatically converted to InDesign footnotes when Word content is published to Typefi Publish. But there are some differences and limitations you should keep in mind...

Footnote Format

Footnote formats you set in Word, such as number format, 'start at', or numbering method, are not transferred when you use Typefi Publish, because InDesign is limited to a single footnote numbering style for each document.

Only one number format, such as '1, 2, 3' or 'a, b, c' is supported per document. Although only one numbering format is supported per document, all of the Microsoft Word numbering formats are supported in InDesign. (In fact, InDesign even adds an additional '*', '**', ***' numbering option.) Custom marks are not supported.

An important consideration is that the default style applied by Word must be specified in the InDesign template to be the one used for footnotes. The footnote reference (little marker within the body of the page) must have a style called 'footnote reference' (lower-case) in the Typefi template.



The standard Word Bookmarks dialog which is used in the Typefi Publish process

Choosing the **Footnote and Endnote Numbering > Continuous** setting in Word does not work. Instead InDesign restarts footnote numbering – at least for each Typefi Section. (However, in case of book pagination, the Typefi Designer currently doesn't automatically reset the counter for each document of the book.)

Endnotes

Word Endnotes are handled as if they are Word Footnotes when you publish a Word document to Typefi Publish and therefore encounter similar exceptions or limitations. Where both Endnotes and Footnotes are used in a document, the Endnotes will be merged within the Footnotes and numbered sequentially according to the InDesign Document Footnote Option settings.

Where footnotes and endnotes must co-exist, consider using a third party application to generate endnotes as literal text in the word document, for instance *Thomson Reuter's EndNote*.

Index

This is a new feature in version 6. An index generated by Word is ignored by Typefi Publish, but Typefi can build an index during page composition where required if a completely new type of Typefi frame – an **index frame** – is created in the template by the designer. It uses the index marking done in Word with its default index markup (see [screenshot](#)), and InDesign uses that to create an index, which is placed into the index frame(s).

The major advantage of an automatically-generated index is that it can update page numbers as content is added and removed. There is no need to wait until the document is complete before generating the index.

Cross-References

Word's native cross-references are ignored by Typefi Publish, although bookmarks used for cross-references are retained during the process. You should use the Typefi Writer **Cross-References** process (see "[Cross-references](#)" on page 49) instead of Word's native Cross-References.

The screenshot shows the 'Index' dialog box in Microsoft Word. It has several sections: 'Index' with 'Main entry' (file formats) and 'Subentry' (empty); 'Options' with radio buttons for 'Cross-reference' (See), 'Current page' (selected), and 'Page range'; a 'Bookmark' dropdown menu; 'Page number format' with checkboxes for 'Bold' and 'Italic'; and a note: 'This dialog box stays open so that you can mark multiple index entries.' At the bottom are three buttons: 'Mark', 'Mark All', and 'Cancel'.

The Word Index markup dialog

Tables

Your Word tables should be converted to Typefi tables (see *"Insert New Table" on page 41*), and the content of the cells formatted with Typefi paragraph styles. Depending on the table designs created by the production designer, the width of the table, and some proportional distribution of columns might need to be applied to tables to get the best-looking result when the Word document is put through the Typefi process. (see *"Keep proportional column widths" on page 42*)

Track Changes

Word's **Track Changes** feature is supported by Typefi Publish. Inserted or deleted content is marked-up with a Typefi Condition (see *"Insert Condition" on page 54*) such as **Deleted** or **Added**. When a Word document with active tracked changes is published through Typefi, the default publishing behaviour is to **Accept All Changes** during the publishing process. However, the Word document and its tracked changes remain unaltered, and different publishing behaviour can be configured. For instance you might want to publish two different versions, one that shows the document as **Final**, and one that shows all the inserted text in green, and all the removed text in red strikethrough.

Images

Word drawings, clip-art, charts, pictures etc. do not convert to Typefi Publish content. You should create graphics and illustrations outside Word, and save them in a file format that is supported by Typefi Publish (see *"Image file formats" on page 8*) and insert them either as a Typefi Inline Image (see *"Insert Image" on page 56*), or part of a Typefi Element.

The same applies to pictures such as digital camera images, or images selected from Word's Clip Art panel, or other locations on your workstation or server.

If you don't have access to the original images, you can save a Word file as a webpage, and Word will create a folder of images from the embedded images in the file. Discard the webpage, and rename the images with meaningful names. They may then be placed as Typefi inline images, or used in image elements.

Attaching Projects to Word Documents

In order to use Typefi Writer to mark up your Word document by inserting sections and elements; tagging paragraphs with correct paragraph styles; tagging words with correct character styles; and adding Typefi markup to existing tables, the document must have a Typefi project 'attached' to it.

You can attach a Typefi project to your Word documents to in two different ways:

- through project attachment
- through the use of a Typefi Stylesheet File (.tss)

Attaching a Typefi project

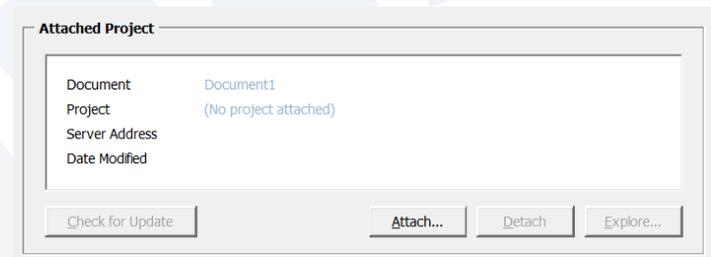
In order to attach a project to an existing Word document, you must have access to the Typefi Publish Server (via your network or via the internet in the case of Typefi Cloud) from your workstation and be a member of the project (see *"Projects" in the Typefi Server User Guide*).

To attach a Typefi project to an **open** non-Typefi Word document:

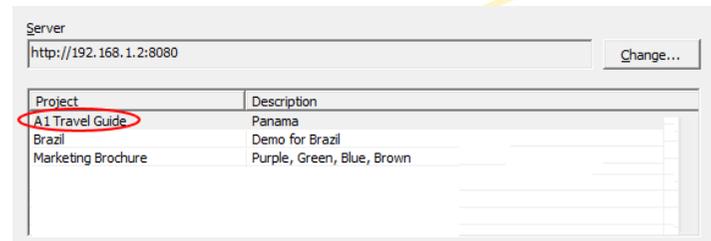
- Click the **Attached Project** icon  in the Typefi tab
- Click **Attach...** in the **Attached Project** dialog that appears
- Select the appropriate project from the list of all the Typefi projects and click **OK**
- Click **Close** to complete attaching the Word document to the specified Project.

The **Attached Project** dialog now displays the Project Name, Server Address and Date that the project was last modified on the Typefi Publish Server (see [screenshot](#)).

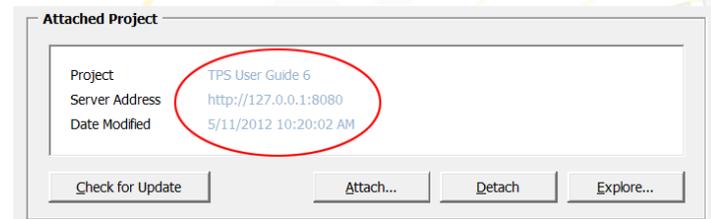
Once a Typefi project is attached to the Word document you can use the Typefi tab to markup the Word document by inserting Typefi objects such as Sections, Tables, Images and Elements, and format the text using Typefi Paragraph and Character Styles. When the markup is completed you can publish the document through Typefi Publish.



Attached Project dialog – showing a document with no project attached.



Select the required project from those available on the specified server



Attached Project dialog showing the name and location of the attached project. (They cannot be manually altered).

Selecting a Project from a TSS File

Another method you can use for associating an existing Word document with a Typefi project is through linking the document to a **.tss** file. One thing to remember is that although you will be able to markup the Word document for use with Typefi Publish, you will not be able to publish the document until you're connected to the Typefi Publish Server.

In order for a Word document to be associated with a project through its .tss file, the Typefi Writer Settings must first have the **Allow projects to be selected from Typefi Style Sheet (.tss)** file option enabled (see *"Typefi Style Sheet (.TSS)" on page 7*).

To select a project from a TSS file:

- Click the **Attached Project** icon  in the Typefi tab of an open Word document
- In the **Attached Project** dialog that appears, click **Attach...**
- Click Typefi Style Sheet (.TSS)
- Click **Browse...**
- Navigate to a .tss file on your system and click on it
- Click **Select**
- Click **OK**
- Click **Close**

Alternatively:

- Choose previously accessed .tss from the drop-down list
- Click **OK**
- Click **Close**

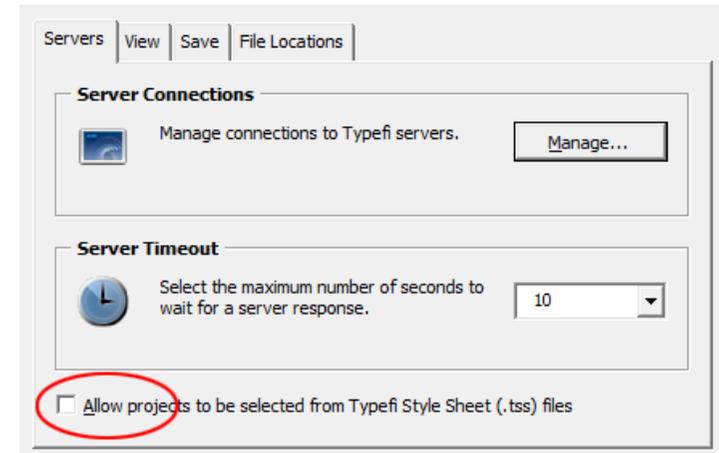
The .TSS files drop-down list displays each .tss file path that has been accessed previously. To clear the list of .tss file paths from this drop-down, choose **Clear List**.

New Typefi Document

You can create new and empty Typefi documents in two different ways. They can be created from within Word, or they can be created directly on the Typefi Publish Server (see *the Typefi Publish Server Guide*).

New Document from Word

The Typefi tab contains a **New Document** button . To create a new Typefi document from within Word, click this icon.



Allowing projects to be selected using a .tss file for association with a Word file

A dialog prompts you to select a Typefi server, then a project from a list of projects available on that Server.

To access projects on a different server, click the **Change...** button and choose another server, then click **OK** to return to the Select Project dialog.

New document based on other document

The **Include content from** drop-down at the bottom of the dialog gives you the option to create a new document that is an exact copy of an existing document that is part of the selected Typefi project.

If you want to start your new document from another Typefi document that is part of the selected project, select the preferred .doc or .rtf file from the **Include content from** drop-down.

- Select a Project from the Project List
- Next click **OK**.

If you've opted not to base your new document on an existing document, the **Select Typefi Section** dialog will appear, asking you to choose the first Typefi Section to insert in your Word document. Every Typefi document must contain at least one section.

To choose the first Typefi Section of your document:

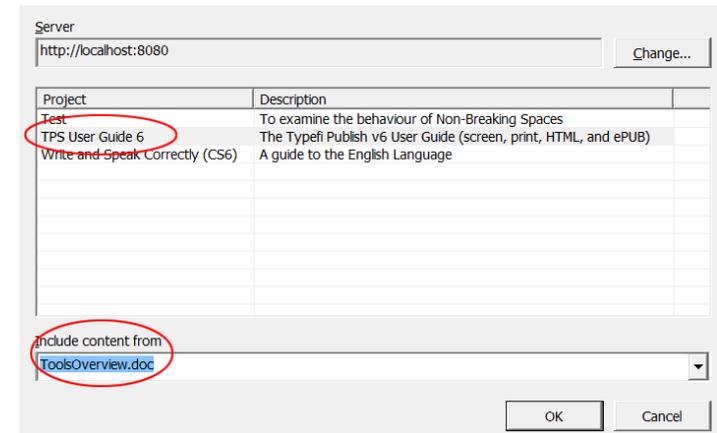
- Choose a Section from the list
- Click **OK** to insert this selected Section as the first in the document and fill in the Section Properties dialog
- Click **OK** to return to the Word document (or Click **Cancel** to return to an empty Word document).

The Word document has now been linked to a Typefi project.

Check for Updates

The **Check for Updates** command is used to resynchronise a Word document with its Typefi project and update all Typefi Writer settings available to the author in Word. A Word document can become out-dated – for instance, when the production designer makes amendments to the InDesign template that is part of a Typefi project.

When a paragraph style name is changed or a new paragraph style is added to the template while you're working on the Word document, the changes will not be reflected in your document until you've resynchronised the document with the project.



Selecting a Project from a server, with 'Include content from' option enabled.

To check whether any updates are available:

- Click the **Attached Project** icon  in the Typefi tab
- Click **Check for Update...**

If there is an update available the Writer will update the project and present a message that the update was successful (see [screenshot](#)).

If there are no updates available a message window appears stating **The project is already up-to-date**, and you can click **OK** to return to the Word document.

Detach Project

There might be a need to permanently remove the link between a Word document and a Typefi project. For instance, the Word document might need to be resubmitted to an author so that a start can be made with the authoring of a next edition for a publication. If the author doesn't have Typefi Writer installed in his copy of Word, there is no need to have this attachment.

To detach a project from a Word document:

- Check out the Word document from the Typefi Publish Server, or open the Word document if stored external to the Typefi Server
- Click the **Attached Project** icon  in the Typefi tab
- Click **Detach** in the Attached Project dialog

A message appears asking you if you're sure you want to detach the project from the active Word document.

- Click **Yes** to detach the project, or click **No**, to leave things as they were and return to Word.

Converting Typefi 5.0 documents to Typefi 6.0

Typefi Writer 6.0 has been fully re-engineered and quite a few things are structured differently, requiring that any earlier Typefi Writer documents are updated in order for them to be published through Typefi Publish 6.0. The conversion to Typefi Publish 6.x takes place automatically.

When you open an obsolete Typefi document, the Refresh command executes automatically (see ["Refresh Document" on page 68](#)). If you don't want to update the document, simply don't save the Word document when you close it.



The project has been updated successfully.

OK

The message that the project has been updated to the latest version on the server

Sections

Every Typefi Publication is made up of one or more sections. Similar to the way documents can be structured in Microsoft Word, Typefi Sections are used to create distinct parts within a publication that contains an unbroken flow of content. Individual Sections may also have a different layout or page numbering format.

The first Typefi component that you must insert in a Word document is a Typefi Section. This is also the reason you're prompted to insert a section when creating a new document (see "*New Document from Word*" on page 29). Typefi uses the sections to determine which page designs and numbering format are used when pages are being created and populated with the content you've created in Word.

Insert Section

To mark each new major segment of a document, you insert a new section. Sections can exist for many different parts of a publication. For instance, a section could contain one of the following: a Chapter, a Preface, an Appendix, a Table of Contents, or an Index. (A chapter section will probably have multiple occurrences). The section names will vary from project to project, and are named by the template designer.

To insert a section:

- Click the Insert Section icon in the Typefi tab
- Choose the Section Type from the Select Section Type dialog
- Click **OK**

The Typefi Section is inserted at the cursor position in the Word document.



Inserting a Typefi Section presents a choice of Section Type (names will vary depending on the project).

For Sections that make reference to Section Fields, or documents that contain Conditions (see *"Insert Condition" on page 54*) the **Section Properties** dialog appears after clicking **OK**. The dialog prompts you for additional data before the section is added to the document.

Typefi Field data entered at section level is unique to the section. The data entered will populate the field placeholders the production designer has inserted in the InDesign template that is used during automated page-composition.

In the Section Properties dialog:

- Enter any of the required field data, such as the ChapterTitle in the example above
- Click **OK**

If the project you're working on contains conditions, you also have the option to make the entire section conditional by selecting the relevant condition from the list displayed in the Conditions tab.

Your Word document will now include a Section. You can now insert the content for that section of your publication that follows the Section marker.

Edit Section

You can change the Section Type, Field data and Condition settings after insertion:

Change Section Type

To change the Section Type:

- Double click the Section marker in the Word document. This displays the **Edit Section** dialog.
- Click **Change**
- Choose a new Section Type
- Click **OK**
- Edit any Fields or Conditions settings if required (see *screenshot*)
- Click **OK**.

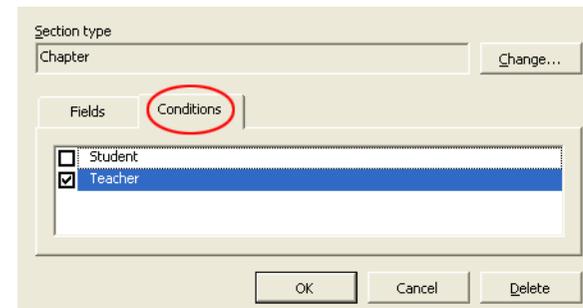
The Section Type in the Word document has now been amended.



Prompt to enter a Chapter Title after inserting a Chapter section that contains a chapter title field

```
SECTION:·Chapter¶  
ChapterNumber:·-(AutoNumber)¶  
ChapterTitle:·Biography¶  
Conditions:·Teacher¶
```

Typefi Section added to the Word document by Typefi Writer.



Choosing a Condition for the entire section

Edit Section Fields

To edit a Section Field:

- Double-click the Section Field label preceding the field data – for example, **ChapterTitle**
- The **Edit Section** dialog appears
- Change the field data
- Click **OK**.

Edit Condition

To edit a condition:

- Double-click **Conditions**: in the Section marker (The **Edit Section** dialog appears)
- Change the Condition settings.
- Click **OK**.

Edit Section with Typefi Document Explorer

The Typefi Document Explorer (see "*Editing from Explorer*" on page 69) can also be used as a tool for editing Typefi Sections. When you need to edit multiple sections and don't want to scroll through your document looking for them, the Document Explorer is a great time-saver.

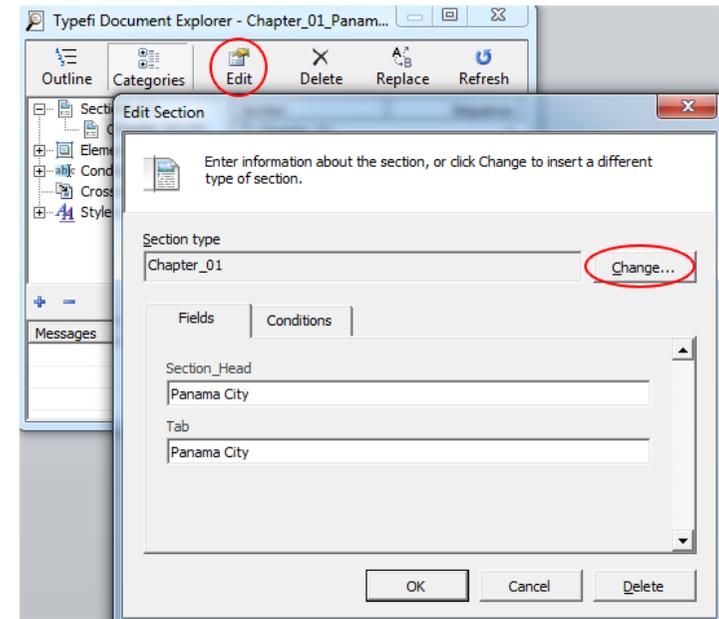
To edit sections with Typefi Document Explorer:

- (Optional) Click a particular section component
- Click the **Explore Document** icon  in the Typefi tab

In the structure tree, the selected section component is automatically highlighted. If this isn't the right component, click the section component you want to edit.

- Click **Edit**
- When the **Edit Sections** dialog appears, make the changes
- Click **OK** to return to the Typefi Document Explorer5
- When you've finished editing, click **Close** to return to the Word document.

(As long as the Explorer window is open, you can continue to navigate through the structure tree and edit other sections).



Typefi Document Explorer allows quick access to, and editing of sections.

Delete Section

When you delete a Section from a document, it only deletes the Section marker and its field information from the document. The content that was part of the Section will remain and become part of the previous Typefi Section.

To delete a Section from your document:

- Double click the Section marker in the Word document (the **Edit Section** dialog appears)
- Click **Delete** (the **Delete Section** message appears)
- Click **Yes** to delete the Section or click **No** to return to the **Edit Section** dialog (see [screenshot](#))
- Click **OK** to return to the Word document.

Alternatively:

- Locate the Section in the Typefi Document Explorer
- Click **Delete** (the **Delete Section** message appears)
- Click **Yes** to delete the Section or click **No** to return to the Document Explorer
- Click **Close** to return to Word.

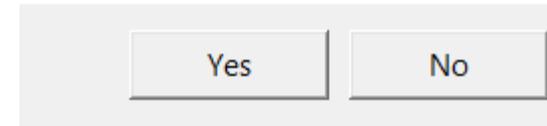
The Section marker has now been removed from the document.

Converting Word section breaks to Typefi Sections

You should remove Word section breaks from the Typefi Writer document and replace them with Typefi Sections where suitable. (This can be facilitated by using the Replace command in Word, looking for **^b** and replacing with nothing...)



Delete the section tag?



The Delete Section dialog

Formatting Text

Word has many layout and design features, but you will mostly use Word to author or edit text. Styles for paragraphs, characters, tables and lists in Word enable you to apply accurate and consistent text formatting.

Typefi distinguishes three different text-based styles: Paragraph, Character and Table Styles. Table styles we'll discuss in a separate chapter (see "[Table Paragraph Styles](#)" on [page 43](#)). List styles, such as bulleted and numbered lists, are incorporated in Typefi's Paragraph Styles. In contrast to Word (which adds some 150 styles to the Normal.dot template), Typefi will only display those styles provided by the production designer for use.

Paragraph Styles

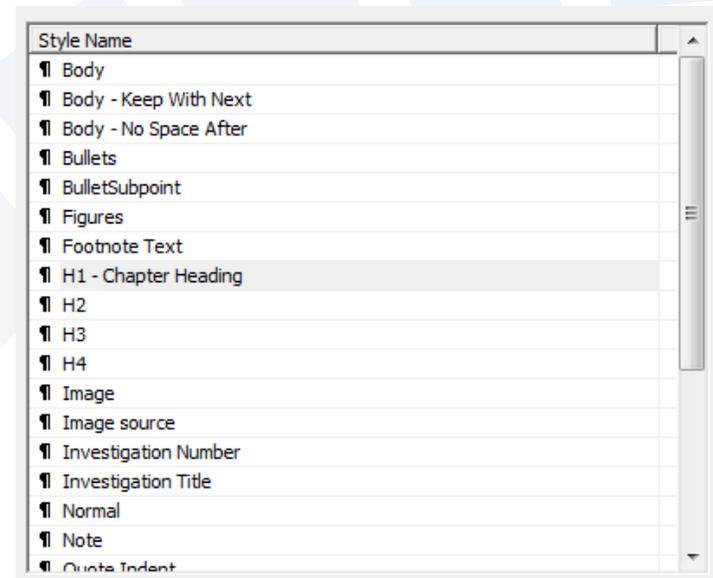
Paragraph Styles are used to apply text formatting to entire paragraphs. You're probably used to using Paragraph Styles through the **Styles and Formatting** section of the Home tab in the Word ribbon.

Typefi Paragraph Styles do not appear in the Styles and Formatting window until they have been used at least once in the document. (However, they can all appear in the Styles and Formatting window when the Word document was created from existing Typefi content, or has had a Writer or Word Theme applied to it.)

Applying Typefi Paragraph Styles

To apply a paragraph style to a selected paragraph in Word:

- Click the **Paragraph Styles** icon  in the Typefi tab
- Click the desired Typefi Paragraph Style name and then click **OK**



Typefi Paragraph Styles dialog presents only styles specified by the designer of the template

Once the Typefi paragraph style has been used, the normal Word technique of applying paragraph styles by clicking on the style name in the Styles window may be used rather than using the Typefi Paragraph Styles window.

Bulleted and Numbered Lists

The production designer must define unique paragraph styles in the InDesign template that forms the basis for the page composition. The numbering, bullet symbol and hanging indentation settings are all included within these styles.

Instead of using a normal paragraph style and then applying the list attribute in Word when authoring/editing text, you must apply the appropriate list paragraph style.

To have these list styles properly recorded in the XML that is extracted behind the scenes when publishing content from Word, you must ensure that the formatting of the styles in Word contains Bullets or Numbering. This ensures the numbered or bulleted items are correctly enclosed within ordered or unordered lists.

Multiple paragraphs within list item

Typefi does not support use of multiple paragraphs within a single list item. Instead you can simulate it by inserting a forced line break (Shift+Enter) where you'd like to see a paragraph inserted within a list item, or – better still – use a special paragraph style designed for the purpose.

List Levels

In Word you create different levels for numbered and bulleted lists by using the Increase Indent button. This does not work in a Typefi document...

You must inform the production designer of the levels of numbers and bullets that will be needed, so that the InDesign template provides the necessary paragraph styles to meet your needs.

Restart numbering

The numbering of lists is controlled by the paragraph styles in the InDesign template. For instance, a Level 2 paragraph style might have a setting included by the production designer that resets the numbers for this style after each higher level. (For example: 1-a-b-2-a-b.) Using the restart numbering option in Word has no effect on numbering during

page-composition in InDesign. Again, the production designer must be made aware of your document numbering needs.

Nesting of lists

Nesting of lists may result in incorrect numbering as the numbering is controlled by the paragraph styles in InDesign. Multiple nesting of lists is quite possible through correct application of paragraph styles provided by the production designer.

Character Styles

Character Styles apply text formatting to selected text within paragraphs. In contrast to Paragraph Styles, they are not used for the text formatting of entire paragraphs, but merely to make certain characters, words, phrases or sentences stand out. For example, there might be words or phrases that need to appear in bold or italic.

Applying Typefi Character Styles

To apply a character style to selected text in Word:

- Click the **Character Styles** icon  in the Typefi tab
- Click the desired Typefi Character Style Name
- Click **OK**.

Microsoft Word Repeat Style Command

Once Typefi Paragraph or Character Styles have been added to the Word Styles and Formatting menu, you can use Word's Repeat Style command to reapply the last applied style elsewhere in your document. (Keyboard Shortcuts F4 or Ctrl+Y or Alt+Enter will also work again at that stage.)

Soft Styles

Manual, or **soft** formatting (such as bold, italic or underline)—as opposed to **hard** character styles—that you apply in Word can be passed through to Typefi Publish. However, the project settings in Typefi Server may filter out any of the supported soft-styles.

The following soft-styles are supported:

Bold, Italic, Underline, Strikethrough, Superscript, Subscript, All Caps and Small Caps (Outline is no longer supported although the button remains)



Style Name	
a Bold	
a Bold Blue	
a Bullet (Arrow)	
a footnote reference	
a Italic	

The Typefi Character Styles dialog only displays those specified by the designer of the template

The soft-style formatting is only passed to the Typefi Publish engine if this feature is enabled as part of the Job Option with which content is published.

Before using such formatting, you should discuss support for soft styles with the person responsible for **Job Option** definition and InDesign template design.

Converting Word Styles to Typefi Styles

There are easy ways to convert Word Paragraph Styles or Character Styles to Typefi Styles. For instance, you can replace all instances of **Heading 1** paragraph style with a Typefi paragraph style called **H1 - Chapter Heading**. (In your document and with your project, just replace these specific style names with relevant style names.)

- Ensure the Styles and Formatting window is displayed
- Locate the first **Heading 1** paragraph in the document and insert your cursor within the paragraph
- Click the **Paragraph Styles** icon in the Typefi tab
- In the Paragraph Styles dialog, click the style you will use to replace **Heading 1**
- Click **OK**.

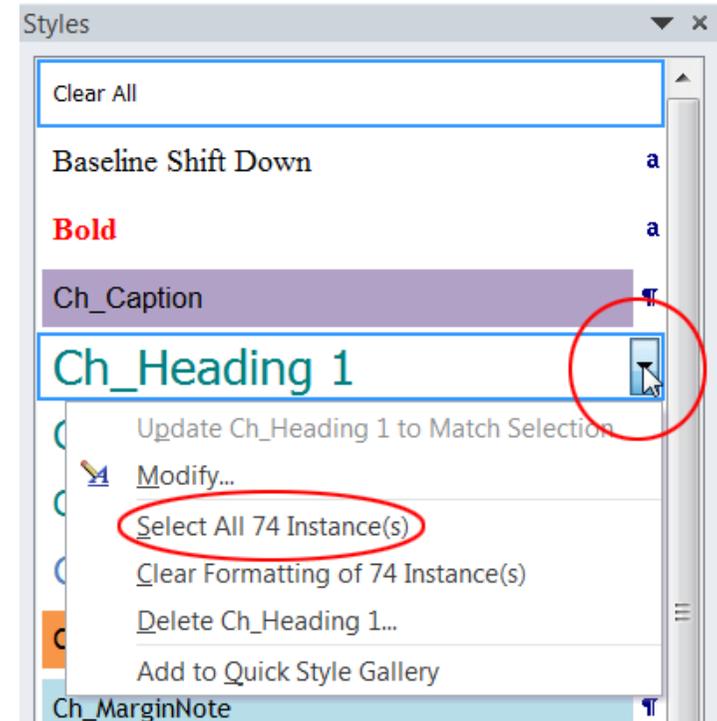
The new style is added to the Word's Styles panel (and may be chosen from there in future).

Then you can replace all the other occurrences of **Heading 1** (old style) with **H1 - Chapter Heading** (new style).

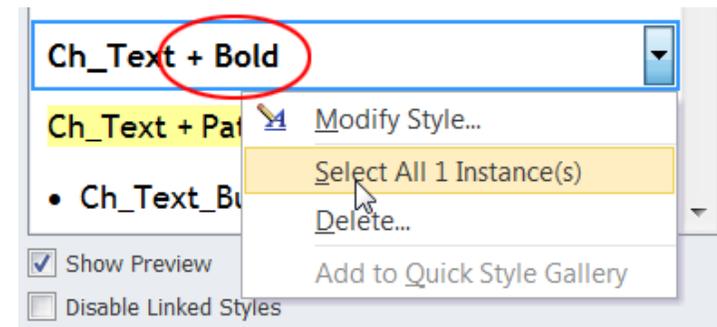
- Place your cursor within a paragraph that has the style you want to replace (such as **Heading 1** in the example)
- In the **Styles and Formatting** window click the drop-down to the right of the name, and choose **Select All [n] Instance(s)** (where [n] is the number of instances it occurs) (see [screenshot](#))
- All of the text within the Word document that has this style applied to it is now selected (a clever Word trick!)
- Click the new paragraph style name in the Styles window, and all text formatted with the old style is now formatted with the new style.

Converting Soft-Styles to Typefi Character Styles

Word soft-styles are easily recognizable in the Styles window after all of the Typefi Paragraph styles have been applied. They appear as a style override, listing the paragraph style name followed by a plus (+) symbol and the soft-style name (if the Styles Options is set to show Font Formatting).



Selecting all instances of text that have a particular style applied.



Paragraph Style with soft-style override showing as '+ Bold'.

Tables

Tables format text inside a grid of columns and rows. When using Typefi Publish, table designs are controlled by the production designer who prepares the InDesign templates that are used during automated page-composition.

Cell colouring applied to tables in Word is ignored by Typefi Publish. In order to clarify how to format tables within Word, you should consult the production designer responsible for developing the Table Styles in the Typefi template being used by the project.

Insert New Table

You may want to insert a new Typefi table and add data to it rather than convert an existing Word table (see *"Converting a standard Word table" on page 45*). Here is the process for doing so:

- Click the **Insert Table** icon  in the Typefi Tab
- Set all Table Size specifications (see *"Table Size" on page 41*)
- Set additional Options such as column widths and alignment (see *"Options" on page 42*)
- Click **OK**

A new table has now been created with a brown-shaded Typefi markup above.

Table Size

The **Table Size** settings in the **Insert Table** dialog control the number of rows and columns in the table, as well as the number of header and footer rows.

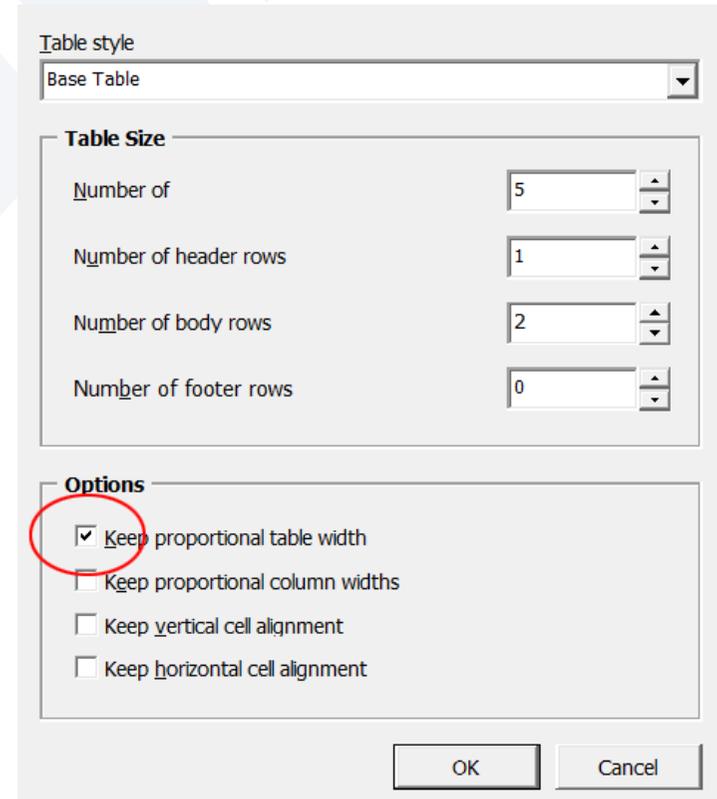


Table style

Base Table

Table Size

Number of 5

Number of header rows 1

Number of body rows 2

Number of footer rows 0

Options

Keep proportional table width

Keep proportional column widths

Keep vertical cell alignment

Keep horizontal cell alignment

OK Cancel

Insert Table dialog with new option – 'Keep proportional table width'

Header Rows

Header Rows are the top one or more rows of a table. Generally they stand out in a design through use of thicker lines, different background colour, or text formatting. The data you enter in any header row will repeat when a table covers more than one page. In some cases, depending on the template design created by the layout designer, you might even see the header row repeating itself across columns. This repeating behaviour is only seen upon completion of page composition. Word itself will not automatically repeat the header rows when your table exceeds the page length in Word.

Footer Rows

Footer Rows are similar to Header Rows, but are positioned at the bottom of a table. (Perhaps there needs to be a special 'totals' row in a financial table, or a table notes row.) Like Header Rows, Footer Rows will repeat themselves across pages when tables continue on next pages during page-composition.

Options

The Options settings enable the author to override some of the table formatting otherwise controlled by the table style designs set up by the production designer in InDesign. This is not necessary unless the formatting in the final job output is unacceptable. The usual Option chosen is 'Keep proportional column widths', since the column content is so variable.

Keep proportional table width (new feature)

In version 6 of Typefi Publish, the width of the table in Word (as a percentage of the width from left to right margin) is maintained if the option to **Keep proportional table width** is selected (see [screenshot](#)).

Keep proportional column widths

Start by applying your own proportional column widths in Word, using Word's native column editing tools. (Tip: Hold the Shift key as you resize a column to leave the other column dividers where they are).

To maintain the proportional column distribution you've set in Word, select the **Keep proportional column width** setting in the Typefi Table dialog (see [screenshot](#)).

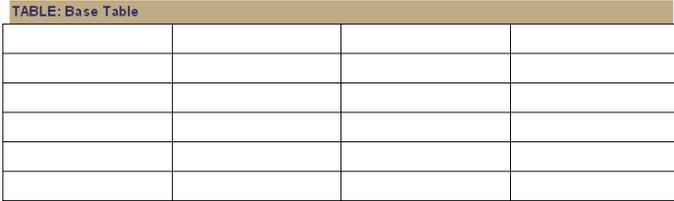
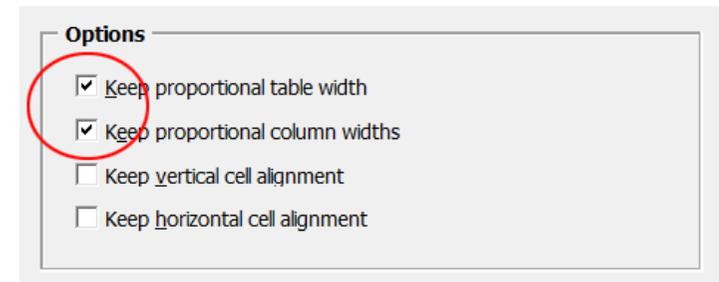


TABLE: Base Table			

Newly-created Typefi Table



Retaining the width of the table and the relative column widths when converting an existing table into a Typefi table.

Keep vertical cell alignment

The **Keep vertical cell alignment** is used when you want to control the vertical alignment of data within its table cells from Word. Enabling this setting will override any vertical alignment settings defined as part of the Table Style itself.

To maintain the vertical cell alignments you've set in Word, select **Keep vertical cell alignment** in the Typefi Table dialog (see [screenshot](#)).

Keep horizontal cell alignment

The **Keep horizontal cell alignment** settings allows you to change the alignment settings of text in a table cell and retain this alignment change even if it is an override for a paragraph style alignment.

To maintain the horizontal cell alignment you've set in Word, select **Keep horizontal cell alignment** in the Typefi Table dialog.

Microsoft Word Table Properties and Typefi Tables

Once you've inserted a Typefi Table in a Word document, you can use many of Word's table editing features to set table attributes.

Table Paragraph Styles

Table cell contents must have their formatting set in Word. You'll have to apply appropriate paragraph and character style formatting to the data in your table.

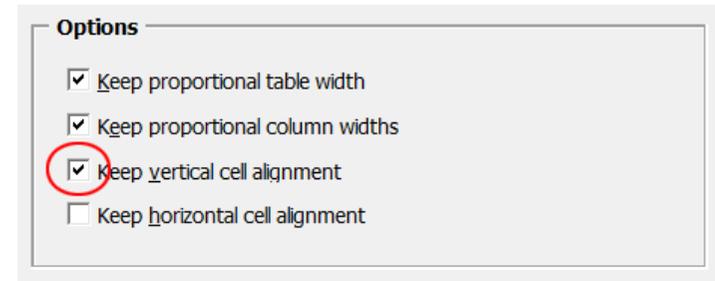
Cell Merging

Cell Merging is not controlled by Typefi Table styles. This means that any cell merging (for instance in header rows or column cells) must be set in Word. Use Word's **Merge Cells** command to merge cells.

You should be careful not to merge cells of a header row with cells of a body row (or even footer row), or to merge cells of a footer row with cells of a body row). Typefi Publish will not process the job, and a warning will appear.

Table Properties

Some of the settings you can apply to a table through Word's native Table Properties dialog are ignored during page composition.



Choose this option to keep cell contents vertically aligned the way they are in the Word table.



The error message that will appear if header rows are merged with body rows

Cell Alignment settings are retained only if the Keep vertical cell alignment option is enabled in the Typefi Table set-up, however, cell inset settings are not retained. Word's **Table Positioning** and **Alignment** settings are not used. Table Break points set in Word are also ignored.

Typefi Tables are inline with text, meaning the tables will always sit in a paragraph of their own, and their alignment and space before and after is controlled by the production designer who designed the InDesign template.

The fact that none of these settings comes across doesn't necessarily mean there is no use for them in Word. For example, in cases where you've enabled the **Keep proportional column widths** setting in the Typefi Table dialog, and have a series of tables in Word that require the same amount of columns and column distribution, you might want to define exact table width or column width settings, to ensure that each table appears identically during page composition.

Edit Table

Tables can be edited after they've been created.

To edit the number of columns or rows a table has, use Word's table formatting tools. Also column distribution, width, merged cells settings are all controlled through use of Word's native table formatting tools.

To edit any of the Typefi specific table settings:

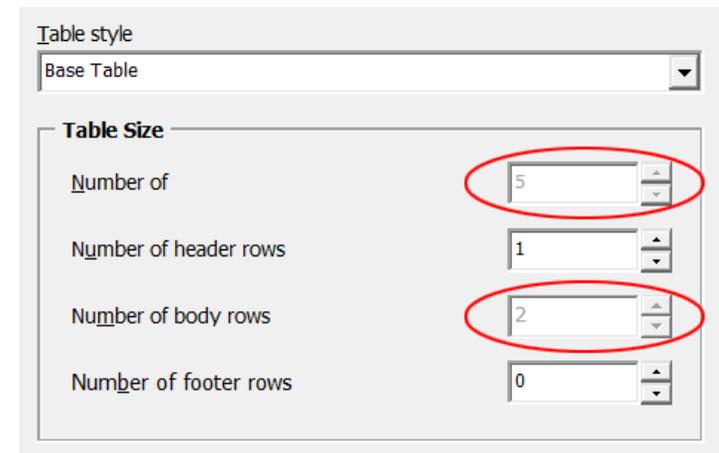
- Double click the Typefi Table header or locate the table in the Typefi Document Explorer
- Click **Edit**

The **Edit Table** dialog appears. With exception of the number of body columns and rows any of the Typefi Table settings can be altered. That is why the number of columns and rows are both dimmed, whereas the number of header and footer rows may be altered.

- Make the required changes for Table Settings and Options
- Click **OK** (and **Close** if editing via the Document Explorer)

Delete Table

When deleting a Typefi Table from Word, a basic Word table (including table data) stays behind in Word.



You may edit a Typefi table's settings after inserting it, but not the number of columns or rows (circled). Do that the usual way using Word Table editing features.

To delete a table:

- Double click the Typefi Table header or locate the Table in the Typefi Document Explorer
- Click **Delete** (and **Close** if editing via the Document Explorer)

Converting a standard Word table

Word tables don't have to be deleted or re-created, because you can turn them into Typefi Tables.

To convert a Word table to a Typefi Table:

- Highlight the entire table
- Click the **Insert Table** icon 
- Set the number of Header or Footer Rows. (You don't need to set the number of body columns or rows, since Typefi will do that automatically)
- Set additional Options (see *"Options" on page 42*)
- Click **OK**.

You have now linked the Word table to a Typefi Table style. To check that the column and row settings have been amended properly, edit the table (see *"Table Properties" on page 43*) and check the Table Size settings (it should now show the correct number of columns and rows).

Before:

Country	Last Year	This Year
USA	345	456
Europe	320	440

After:

TABLE: Base Table

Country	Last Year	This Year
USA	345	456
Europe	320	440

An existing Word table (above), and the result of converting it to a Typefi table (below)

Hyperlinks

You add Hyperlinks to documents for navigational purposes. You can include them in Cross-References or set them as individual navigational links.

Hyperlinks consist of two components: text to display and a target. The hyperlink text to display is the content that is displayed in the Word document and the target is the 'address' to which the hyperlink points when it is clicked in an interactive PDF.

Insert Hyperlink

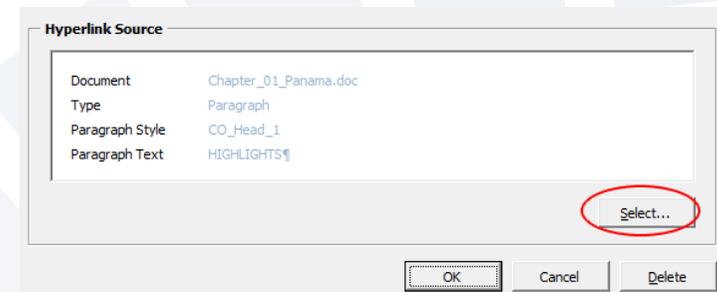
Word web and email hyperlinks are automatically converted during page composition. However, you must re-create other Word hyperlink types (such as links to bookmarks or paragraph styles as targets) as Typefi Hyperlinks.

To insert a new hyperlink:

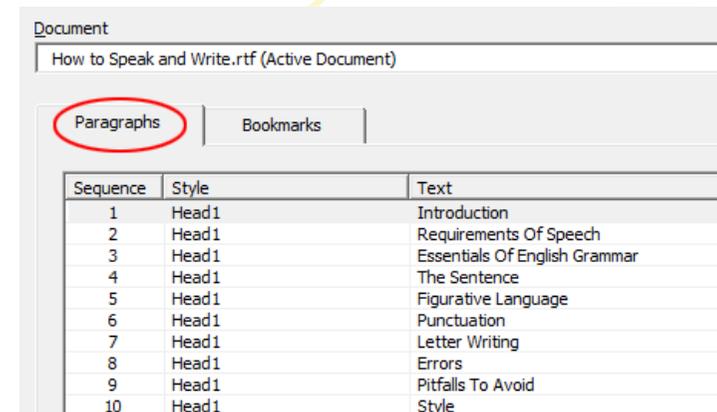
- Highlight the content that is to be the source of the hyperlink
- Click the **Insert Hyperlink** icon  in the Typefi tab (the **Insert Hyperlink** dialog appears)
- Click **Select...** (the **Select Hyperlink Source** dialog is displayed)
- Choose the document you want the Hyperlink to link to.

By default the **Active Document** is selected. However, if you check out other documents that are part of the same Typefi project, you may choose one of them from the **Document** section at the top of the dialog. (When publishing a job containing inter-document hyperlinks, you must publish content from the Typefi Publish Server, and during the page-composition the hyperlink will be resolved).

- Next click the **Bookmarks** or **Paragraphs** tab.
- Choose the target from the list
- Click **OK** and then **OK** again.



Choose a source for a Hyperlink by clicking the 'Select' button in the Insert Hyperlink dialog.



Having chosen the current ('Active') document and the type of source (Paragraph Styles), the particular heading can then be selected.

Sorting: To make it easier to choose a hyperlink destination in a long list, click either the **Sequence**, **Style** or **Text** labels. This orders the list by the content listed under the label. Clicking the same label again toggles the sort order between ascending and descending order.

The Typefi Hyperlink is now created and recognisable through its mark-up in the text (see [screenshot](#)). Hyperlink display text can be edited at any time.

Bookmarks

Bookmarks are another document navigation tool. You can insert them as empty anchors or around some text that is highlighted. To use a Bookmark as a target for a Hyperlink, you must first insert a Bookmark and name the Bookmark in Word. (The Typefi **Quickmark** feature creates a temporary bookmark to which **Go To Quickmark** will jump).

Paragraph

To use a paragraph that has a particular paragraph style applied to it as a hyperlink target, you must first ensure that the paragraph style is enabled as an allowable source in the Typefi project's **Cross-references** settings. (See **Typefi Server User Guide**). Those paragraph styles allowed as a Cross-reference source will be listed as possible hyperlink targets. This can only be done by someone who has access to the project files on the Typefi Server.

Edit Hyperlink

You can edit Hyperlink display text and target settings.

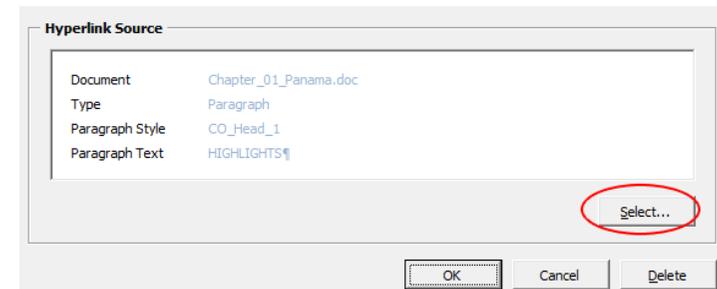
To edit the Hyperlink display text, either insert the cursor between the '<' and '>' markers or highlight the current text displayed between the markers in the text and make the relevant changes.

To edit the Hyperlink target:

- Double click the Hyperlink marker in the Word document. The **Edit Hyperlink** dialog appears
- Click **Select** to display the Select Hyperlink Source dialog.
- Choose the new target
- Click **OK** to return to the **Edit Hyperlink** dialog
- Click **OK** to update the Hyperlink.

The snowman was very happy it was winter. As the **HYPERLINK:Bookmark<weather>** was just all that much better and it allowed him to stand tall. ¶

A Typefi Hyperlink to a bookmark



Editing the source of a Hyperlink

Alternatively, you can use the Document Explorer to edit the hyperlink:

- Locate the Hyperlink in the Typefi Document Explorer and click **Edit** (the **Edit Hyperlink Dialog** appears)
- Next click **Select** to display the Select Hyperlink Source dialog
- Choose the new target
- Click **OK** to return to the Typefi Document Explorer
- Click **Close** to return to Word.

Delete Hyperlink

To delete the Hyperlink Destination:

- Double click the Hyperlink marker in the Word document (the **Edit Hyperlink** dialog appears)
- Click **Delete** (the **Delete Hyperlink** message appears)
- Click **Yes** to delete the Hyperlink or click **No** to return to the Edit Hyperlink dialog
- Click **OK** to return to the Word document.

Alternatively, you can use the Document Explorer to delete the hyperlink:

- Locate the Hyperlink in the Typefi Document Explorer
- Click **Delete** (the **Delete Hyperlink** message appears)
- Click **Yes** to delete the Hyperlink or click **No** to return to the Document Explorer
- Click **Close** to return to Word.

The display text for the hyperlink is no longer a hyperlink, but the text remains.

Cross-references

Cross-References are used to point the readers of a document to other sources of information located elsewhere in the same chapter or another chapter. We use Cross-References in this user guide as a way of directing you to locations in the text where you can find related information or more in-depth information about topics discussed.

Typefi Cross-References enable the author to mention sources such as particular paragraphs, bookmarks, or even other documents. The Cross-Reference text is taken from the source. Cross-references can be formatted with a variety of choices and will be hyperlinked to the source.

The formatting of the cross-reference is controlled by the designer of the Typefi template, using InDesign's built-in cross-referencing. There is much flexibility in the choices, including non-breaking spaces to prevent page numbers breaking to the next line, for instance.

Insert Cross-Reference

Cross-References get their content from the Cross-Reference Source. For instance, a Cross-Reference could point to a particular heading in the text and copy the text of this heading into the cross-reference text, e.g.: (see '**Cross-References**' on p.45).

If you want to convert existing text into a link that points to a position elsewhere in your document, you must use a **Hyperlink**, not a cross-reference.

To insert a Cross-Reference:

- Place your cursor within a paragraph at the cross-reference insertion point.
- Click the **Insert Cross-Reference** icon  in the Typefi tab (the **Insert Cross-Reference** dialog appears)
- Click **Select...** (the **Select Cross-Reference Source** dialog is displayed)
- Choose the document that contains the *source* (this is an example) for the Cross-Reference.

By default the active document is selected. However, if you check out other documents that are part of the same Typefi project, you may choose one that is open.

When publishing a job containing inter-document cross-references, you must publish content from the Typefi Publish Server, otherwise there will be **unresolved cross-references**. (See the **Typefi Publish Server Guide**). During the page-composition the cross-references will be resolved. An **Unresolved Cross-Reference** indicator appears in the text if the source file cannot be located at the time of publishing.

- Click the Paragraphs or Bookmarks tab
- Choose the Cross-References Source from the list
- Click **OK**
- Choose the Cross-Reference Result from the choices that appear
- Click **OK** again.

A Cross-Reference marker has now been inserted in the text and stands out by its default orange background colour.

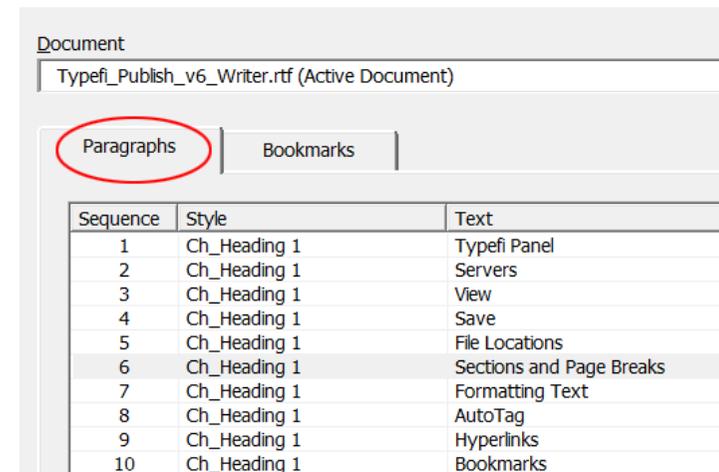
Format

The **Format** section of the **Insert Cross-Reference** dialog determines what content is inserted at the cursor. Cross-References can contain either source text or a page number. (Usually, authors insert a combination of both text and page number.)

Note: In Word, you will not see the actual content of the cross-reference – only the Typefi markup indicating a CROSS-REF and the type of content it is a reference to. The correct content will appear in the final job output.

Regardless of whether a Cross-Reference points to a Paragraph Style or a Bookmark, the Cross-Reference text will contain one of the following:

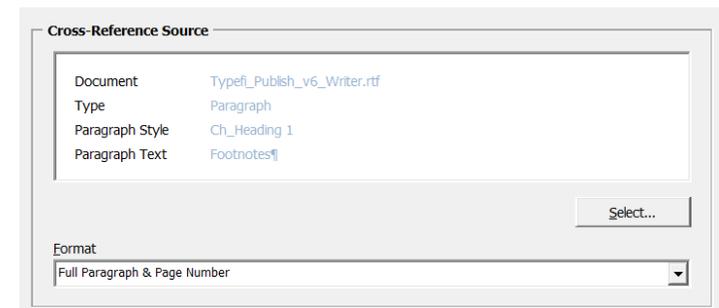
- **Full Paragraph:** the contents of the paragraph that is selected as a source is inserted as source text
- **Full Paragraph & Page Number:** same as above but with the page number as well
- **Page Number:** just the page number



Selecting a Cross-Reference Source, using Paragraph Styles as Source.

- **Project field text:** content of one of the Project fields (such as Author). This is either sourced from the Typefi project settings on the Typefi Publish Server, (see the Typefi Publish Server Guide) or from the Typefi Print dialog in Word (see **CROSS-REF: Paragraph**).

Example of a Cross-Reference to a paragraph.



Insert Cross-Reference dialog after selecting target paragraph 'Footnotes', with format set to Full Paragraph and Page Number.

- **Paragraph Number:** if headings are numbered, just the number of the heading will appear
- **Paragraph Number & Page Number:** both of the above
- **Text Anchor Name:** the name of the bookmark that was created
- **Text Anchor Name & Page Number:** the above plus the page number of its location

Generally you would direct your Cross-References to headings of various levels, but be careful. If you choose a paragraph that contains many lines, the entire content will be inserted as your cross-reference source. (You might want to consider using a Hyperlink in that case). Cross-references to Bookmarks should probably only be to the Page Number, since Bookmarks names cannot contain spaces.

Hyperlink

A hyperlink will be created automatically, so that clicking on the cross-reference in a PDF will take the reader to its source.

Edit Cross-Reference

Cross-Reference sources can be edited after insertion.

To edit a Cross-Reference:

- Double click the CROSS-REF marker in the Word document (the Edit Cross-Reference dialog appears)
- Click **Select** to display the **Select Cross-Reference Source** dialog (see [screenshot](#))
- Choose a new source
- Click **OK** to return to the Edit Cross-Reference dialog
- Click **OK** to update the Cross-Reference.

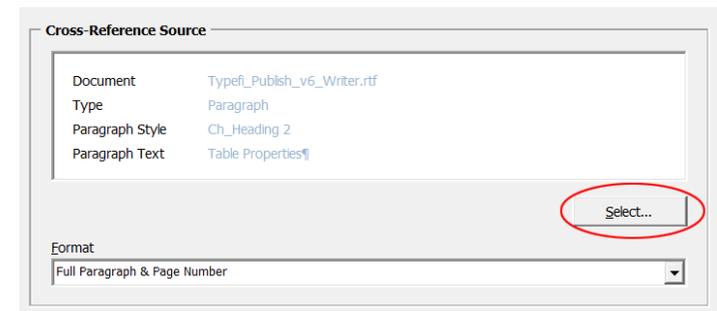
Alternatively, you could use the Document Explorer:

- Locate the Cross-Reference in the Typefi Document Explorer and click **Edit** (the **Edit Cross-Reference Dialog** appears)
- Next click **Select** to display the Select Cross-Reference Source dialog
- Choose a new source
- Click **OK** to return to the Typefi Document Explorer
- Click **Close** to return to Word.

Delete Cross-Reference

To delete the Cross-Reference:

- Double click the CROSS-REF marker in the Word document (the **Edit Cross-Reference** dialog appears)
- Click **Delete** (the **Delete Cross-Reference** message appears)
- Click **Yes** to delete the Cross-Reference or click **No** to return to the **Edit Cross-Reference** dialog



Editing a Cross-Reference.

- Click **OK** to return to the Word document.

Alternatively, you could use the Document Explorer:

- Select the Cross-Reference in the Typefi Document Explorer
- Click **Delete** (the **Delete Cross-Reference** message appears)
- Click **Yes** to delete the Cross-Reference or click **No** to return to the Document Explorer
- Click **Close** to return to Word.

Or just delete the CROSS-REF maker by selecting and pressing Delete on the keyboard.
The CROSS-REF tag will be removed.

Conditions

You may need to produce a version of a document that has some differences to the original, yet is largely the same. Rather than maintain two or more files, you can use 'conditional' markup in the one file, and print whichever one you need. Conditional formatting of content allows the mark-up of Sections, Elements, Images and Text for inclusion or exclusion when content is published through Typefi Publish.

When could you use conditional formatting?

- When publishing a teacher and student edition of a publication, you would want the answers to the questions to appear only in the teacher edition.
- When writing marketing or technical documents in a combined US English and UK English document.
- When developing software documentation for an application that runs on Mac or Windows OS and you would like to publish unique editions for each Operating System.
- When working on catalogues or product factsheets that you must produce with prices in either Euros, US Dollars or Australian Dollars.
- Or creating a Limited Edition and a Full Edition of a publication, where the Limited Edition excludes all graphics.

These are just some examples of where conditions could become useful and allow you to use a single content file to produce different editions of a publication.

Conditions are only available to the Typefi Writer in Word when they have been inserted at Typefi project level (see [the Typefi Server User Guide](#)) first. Any content marked up with a condition not only sits between condition markers, but is also highlighted in a condition-specific colour. These colours are also defined at project level on the Typefi Publish Server.

Insert Condition

You can use conditions at various levels with Typefi Writer. The highest level of content that can be marked up with a condition is a Typefi Section.

Conditions and Sections

When you markup a Typefi Section with a condition, it means that **all content** within that section is included in the condition. For instance, in a Teacher/Student publication, the teacher edition might have additional sections included at the back of the publication with in-depth answers to end-of-chapter questions; or specific training instructions.

You can set a condition for a Section when inserting the section, or when editing the section. (see "*Insert Section*" on page 32).

- Click the **Condition** tab in the **Insert Section/Edit Section** dialog to view the conditions
- Select the condition(s) that must be applied to the section
- Click **OK**.

Conditions for other content

Conditions contain two components: the content and the condition that marks up this content.

To insert a Condition:

- Highlight the content that is to be conditionalised (or insert the cursor at a location where you would like to add some conditionalised content)
- Click the **Insert Condition** icon  in the Typefi tab (the **Insert Condition** dialog appears)
- Click the Condition you want to use
- Click **OK**.

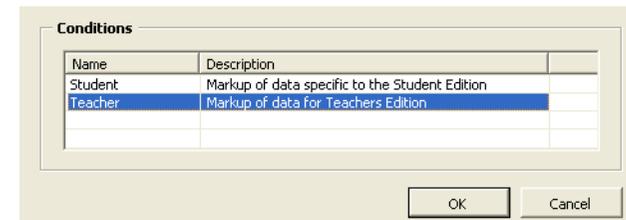
The condition has now been inserted in your document and is recognisable by its distinctive markup.

If you have not yet inserted the conditionalised content do it as follows:

- Insert your cursor between the '<' and '>' markers
- Insert the content that is to be conditionalised.

Edit Condition

Conditional content and the Conditions themselves can be altered after they've been added to the document.



Inserting a Condition.

Questions:

Name two purposes for the Typefi Writer?

CONDITION: Teacher<The Writer is used to provide authors and editors with an easy to use editorial markup tool. In addition it allows for publishing of content from Word to professionally designed PDFs.>

What is the first object that every Word document must contain?

Condition applied to highlighted text.

To edit the Conditional content, either insert the cursor between the '<' and '>' markers or highlight the current text displayed between the markers in the text and make the relevant changes

To change the Condition:

- Double-click the Condition marker in the Word document (the **Edit Condition** dialog appears)
- Choose the new Condition
- Click **OK** to update the Condition.

Alternatively, you could use the Document Explorer:

- Locate the Condition in the Typefi Document Explorer and click **Edit** (the **Edit Condition** dialog appears)
- Choose the new condition
- Click **OK** to return to the Typefi Document Explorer
- Click **Close** to return to Word.

Delete Condition

To delete a Condition:

- Double-click the Condition marker in the Word document (the **Edit Condition** dialog appears)
- Click **Delete** (the **Delete Condition** message appears)
- Click **Yes** to delete the Condition or click **No** to return to the **Edit Condition** dialog
- Click **OK** to return to the Word document.

Alternatively:

- Locate the Condition in the Typefi Document Explorer
- Click **Delete** (the **Delete Condition** message appears)
- Click **Yes** to delete the Condition or click **No** to return to the Document Explorer
- Click **Close** to return to Word.

The content stays in the Word document, but it is no longer marked up as a condition and will always appear when the content is published through Typefi Publish.

Inline Images

Typefi's Insert Image command always generates inline images. Inline images are graphics that are placed within a paragraph's content. They flow with the text as more content is inserted or when content is removed.

About Images

As we discussed earlier, images inserted either as Inline Images, or as part of Typefi Element data, must be saved in a file format that is supported by Typefi Publish (see *"Image file formats" on page 8*).

Typefi does not embed images in Word, but it does create a link to the image file. (This means that when you insert images in the documents you must have access to the files.) Each image that is placed is automatically added by the FileManager application to the Images repository that is part of the Typefi project to which your Word document belongs. (see *the Typefi Publish Server Guide*). Typefi then uses the images from this repository when publishing the content.

If an image in its original storage location is updated (possibly by a graphic designer who created the image), and you publish the Word document again, you'll be prompted by FileManager asking you if you'd like to update the image.

Insert Image

You can insert images anywhere within a paragraph and they will resize according to the inline image resize behaviour the production designer has defined for inline images as part of the paragraph style. Inline images can also sit in a paragraph on their own, and—as with images placed within a paragraph—image resize controls are defined by the paragraph style and not visible until you publish the document.



FileManager warning about an updated image.

To insert an image:

- Insert the cursor at the image insertion point in a paragraph
- Click the **Insert Image** icon in the Typefi tab. The **Insert Image** dialog appears
- Click **Browse...**, the **Select Image** dialog appears
- Navigate to the image and select it
- Click **Select**

You return to the **Insert Image** dialog and the filename and path are inserted. Enter a Comment (this will appear if the image is missing at the time of output, and is optional).

- Click **OK**.

The image is now inserted. Depending on whether you have the **Show document images** setting enabled in Typefi Preferences (see "[Document Images" on page 8](#)), you'll either see an **IMAGE:** marker followed by the filename, or an image preview (with limitations, such as Word not being able to display certain valid file types).

Comments

The Comments field in the **Edit/Insert Image** dialog can contain text. When Typefi Publish can't locate an image during page-composition, the text found in the Comment field is inserted instead.

Comment field text could also be used in cases where documents are published to InDesign as well as to HTML (Web). With the aid of a script, the data could be used to populate the **Alt** tag required for accessibility reasons.

Edit Image

Images can be replaced by other images, or comments may be edited at any time.

To edit the image:

- Double click the IMAGE marker in the Word document or double click the image itself if you are previewing it in Word (the **Edit Image** dialog appears)
- Click **Browse**. The **Select Image** dialog appears
- Navigate to the replacement image and select it
- Click **Select** to return to the **Edit Image** dialog, and make a change in the Comment if needed
- Click **OK** to update the image.

Alternatively, you could use the Document Explorer:

- Locate the Image in the Typefi Document Explorer and click **Edit** (the Edit Image dialog appears)
- Click **Browse** (the **Select Image** dialog appears)

To move items from column 1 to column 2 click the **IMAGE: 1xRight.png** icon

To move items from column 1 to column 2 click the  icon

Typefi Inline IMAGE marker (first line), image previewed (second line)



Inserting or editing the link to an image.

- Navigate to the replacement image and select it
- Click **Select** to return to the **Edit Image** dialog, and make a change in the **Comment** if needed
- Click **OK** to return to the Typefi Document Explorer
- Click **Close** to return to Word.

Delete Image

To delete an Image:

- Double click the Image marker in the Word document, or double click the image itself when you are previewing the images in Word. The **Edit Condition** dialog appears
- Click **Delete**. The **Delete Image** message appears
- Click **Yes** to delete the image or click **No** to return to the **Edit Image** dialog
- Click **OK** to return to the Word document.

Alternatively, you could use the Document Explorer:

- Locate the image in the Typefi Document Explorer
- Click **Delete**. The **Delete Image** message appears
- Click **Yes** to delete the image or click **No** to return to the Document Explorer
- Click **Close** to return to Word.

The image has now been removed from the document.

Elements

Elements are objects or groups of objects that are distinguished from the core text in a publication by their difference in design. Element content is built-up dynamically during page composition before it is placed on the page by the Typefi Publish System.

As an example, some of the element components might resize as other related components change in size – based on the content they receive. For instance, if an image is related to a caption and the image is made smaller during page composition, the distance between the bottom of the image and the caption should be maintained. The Element design and resize behaviour is defined by the production designer working in InDesign.

Element Types

There are three different types of Elements: **fixed**, **floating** and **inline**. Each Element type has its own characteristics and functionality in page design. However, the method of Element insertion in the Word document is similar for each of the Element Types.

Fixed Elements

A **Fixed Element** is an element that is inserted at the start of a section and is inherently linked to that section. Therefore a Fixed Element will only be available for insertion when you are indeed inserting the Element in its related section. Additionally a Fixed Element can only be inserted once in a section. This means that if you've already inserted it in a section, the Element will no longer be listed as an available element for the section.

An example of a fixed element could be:

- A special object on the first page of a chapter (new Section) containing the Objectives information (Educational sample).
- Placement of an author's photo with caption at the start of each Article (Typefi Section).

Inline Elements

Inline Elements are elements that are inserted in, and move with the text. Additionally, they may be located in 'anchored object' positions defined by the production designer (such as outside the text column). Inline elements may be inserted as often as needed, and may contain a variety of content (such as an image and caption).

Floating Elements

Floating elements are elements that are placed as individual objects during the page-composition process. They are positioned based on pre-defined layout rules added by the production designer to the InDesign template that is used as the basis for the page-composition. Like Inline Elements, Floating Elements may be used more than once per section, and may contain a variety of content for each occurrence in a document.

Variants

In contrast to Inline Elements which have one appearance, Floating Elements can be designed by the production designer to have multiple appearances. Each of these appearances is referred to as a **Variant**. When the variants are named, you may choose (during the insertion process) which of them Typefi Publish must use during page composition.

Example of Variants:

- A Figure Element that has both a Portrait (vertical) and a Landscape (horizontal) variation. Depending on the orientation of the image you are using, you will select the relevant variant when inserting the element.
- A Margin Note Element that has a slightly different design for left and right pages. In this case, the production designer would design the variations and you would insert the Margin Note without making reference to a specific variant. (Typefi Publish will choose the correct variant based on whether the note appears on a left or right hand page.)

Insert Elements

You should insert Elements at the end of a paragraph, as inserting elements mid-paragraph results in the paragraph ‘breaking’ at that point. In cases where an Element must be placed as close as possible to related topic content in the text, you may add an Element Reference in that location after inserting the element. This reference may appear anywhere within paragraph text, but is best at the end of a paragraph for various reasons.

Elements can prompt you for three different types of content:

- Text
- Image data
- Field data

Depending on the complexity of an element (which is controlled by the production designer) you might be prompted to provide specific content as you insert the Element into Word.

Let’s have a look at inserting a simple element that contains each of the three content types: a photo with caption and photographer’s name added as field data to the side of the element during page-composition.

To insert an Element:

- Insert the cursor at the end of a paragraph, before the paragraph return character
- Click the **Insert Element** icon in the Typefi tab. The **Select Element** dialog appears
- Choose the Element you want to insert
- Click **OK**

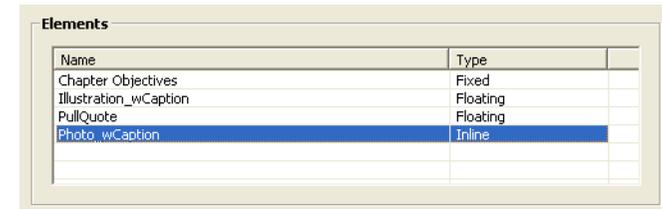
The **Insert Element** dialog appears, displaying the Element Structure from top to bottom on the left side.

Change Variant (Floating Elements Only)

If you’ve inserted a Floating Element, you have the option to choose the required **Floating Element Variant** at this stage. For Fixed and Inline Elements this option is not available. The default Variant setting is **Automatic**, which means that the Typefi Engine will decide which Variant to place during page-composition. In this sample element there is the option to choose a Portrait or Landscape variant (see [screenshot](#)).

To change the Variant Setting:

- Click **Change...** The **Select Variant** dialog appears
- From the list of available Variants choose the Variant you want to use



The Insert Typefi Element dialog



Entering information about a Typefi element, including choosing the Variant.

- Click **OK** and you will then return to the Insert Element dialog.

Element Fields

A good method for assigning values or data to the different content types that are part of an element is to work your way from the top down in the Element structure view. Elements can be quite complex, especially when they contain nested Elements, and using this top-down approach ensures the correct content is added for all the element objects listed in the structure.

To set Field values:

- Click the Fields node in the Element structure
- Enter field values for each field
- Select the next item in the Element structure, or click **OK** if you've finished setting all of the Element data, and the Element will be inserted.

Element Image

If an Element contains an image, a link to the image on your computer or a server volume must be established.

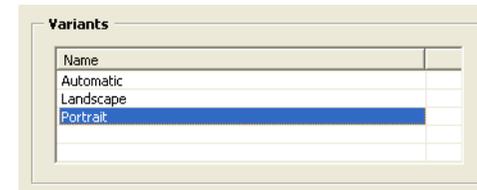
To set the Image link and comments:

- Click the Image node in the Element structure
- Click **Browse...**, and the **Select Image** dialog appears
- Navigate to the image and select it
- Click **Select**, and the **Insert Element** dialog will reappear with the full filepath inserted
- Enter a Comment (optional, but good practice)
- Click **OK** (or continue clicking through the rest of the Element Structure if there are more items listed that need data).

The Element now appears in the Word document, recognisable by its ELEMENT and END ELEMENT markers. You may need to insert text in a caption area (as in the example used here). Click and type the required text content.

Edit Elements

If at any stage you want to change an Element's image link, content, or field values, you can edit the element.



Select the Variant from the list.



Setting Field information in sequence.



Insert Element process—specify image location by clicking **Browse...**

```

ELEMENT 1: Photo_wCaption
Photographer: Cari Jansen
Element Image: ks77150.jpg
[Click here and type text]
END ELEMENT

```

Element inserted in Word needing caption text to be entered

To edit an Element:

- Double click the ELEMENT marker in the Word document (the **Edit ELEMENT** dialog appears)
- Click on the component you'd like to edit (e.g. click **Fields** if you want to edit the Field values)
- Make the changes and click **OK** to return to the Word document
- Click **Close** to return to Word.

If you know in advance that you'd like to edit a particular content component that is part of the element, you can start by double-clicking that component marker within the Element and the Edit Element dialog will open with the correct object already selected in the Element Structure.

Alternatively, you can use the Document Explorer:

- Locate the ELEMENT in the Typefi Document Explorer and click Edit. The **Edit ELEMENT** dialog appears. (You can also locate the component within the Element Structure and select that first, then click Edit)
- Click on the component you'd like to edit (e.g. click **Fields** if you want to edit the Field values)
- Make the changes and click **OK** to return to the Typefi Document Explorer
- Click **Close** to return to Word.

Delete Element

When you delete an Element, only the text content stays behind in the Word document. Images and fields are removed from the Word document.

To delete an Element:

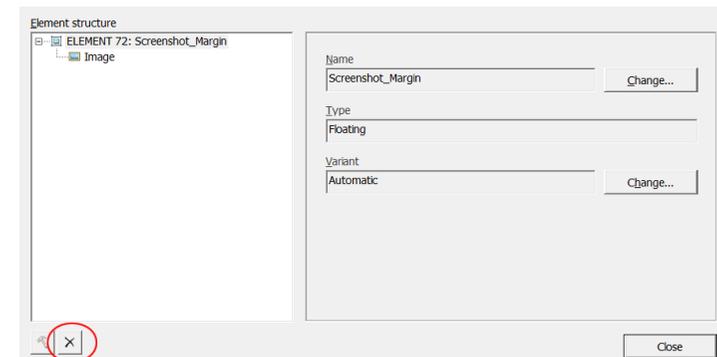
- Double click the ELEMENT marker in the Word document (the **Edit Element** dialog appears)
- Click the **Delete** icon (the **Delete Element** message appears)
- Click **Yes** to delete the Element or click **No** to return to the **Edit Element** dialog
- Click **OK** to return to the Word document.

Alternatively:

- Locate the Element in the Typefi Document Explorer
- Click the **Delete** icon (the **Delete Element** message appears)
- Click **Yes** to delete the Element or click **No** to return to the Document Explorer
- Click **Close** to return to Word.



The element caption text has been entered in the caption area



The new Delete Element icon

Element Reference

An **Element Reference** is a marker that links a Typefi Element to a specific location in the text. These markers are used during the page-composition process in conjunction with placement rules assigned to the element by the production designer to determine where the Element is best placed on the page.

For instance, a keyword note displayed in the margin of a publication that defines a keyword used in the text might have its element reference set just after the keyword is mentioned, so that the margin note will line up with the keyword during page-composition.

Insert Element Reference

As discussed earlier you should not insert an Element mid-paragraph as this would result in insertion of a paragraph break. Element References are the best way to link an element to any location within a paragraph.

To avoid page-composition errors, don't insert multiple Element References that point to the same element.

To insert an Element Reference

- Place the cursor at the insertion point in the text
- Click the **Insert Element Reference** icon in the Typefi tab. The **Insert Element** dialog appears, listing all elements that have been inserted in the active Typefi Section
- Select the relevant Element
- Click **OK**.

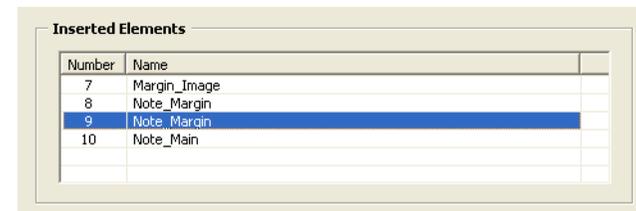
An ELEMENT REF marker appears at the insertion point in the text.

Edit Element Reference

If you want to change the Element Reference to a different Element, then edit the Element Reference.

To edit the Element Reference:

- Double click the ELEMENT REF marker in the Word document (the **Edit Element Reference** dialog appears)
- Choose the new Element Reference
- Click **OK** to update the Element Reference



Number	Name
7	Margin_Image
8	Note_Margin
9	Note_Margin
10	Note_Main

Insert Element Reference

Alternatively, you can use the Document Explorer:

- Locate the Element Reference in the Typefi Document Explorer and click **Edit** (the **Edit Element Reference** dialog appears)
- Choose a different Element Reference
- Click **OK** to return to the Typefi Document Explorer
- Click **Close** to return to Word

Delete Element Reference

To delete an Element Reference:

- Double click the ELEMENT REF marker in the Word document (the **Edit Element Reference** dialog appears)
- Click **Delete** (the **Delete Element Reference** message appears)
- Click **Yes** to delete the Element Reference or click **No** to return to the **Edit Element Reference** dialog
- Click **OK** to return to the Word document.

Alternatively, you can use the Document Explorer:

- Locate the Element Reference in the Typefi Document Explorer.
- Click **Delete** (the **Delete Element Reference** message appears)
- Click **Yes** to delete the Element Reference or click **No** to return to the Document Explorer window
- Click **Close** to return to Word

Even more straightforwardly, just select the element reference, and press the **Delete** key on the keyboard...

The ELEMENT REF marker has now been removed from the text.

Writer Markup

Typefi Markup is the code that is added to the Word file as you insert Typefi objects. It is formatted to stand out from normal Word content. Each of the Typefi Markup styles is listed with a **TPS** prefix in the **Styles and Formatting** window in Word, and you may modify their appearance without affecting their behaviour (e.g. make the background a different colour).

Convert to Tags

It is possible to change the Typefi markup to 'Tags' rather than 'Fields'. When Tags are displayed you will not be able to edit the Typefi components by double clicking them. (Take great care when editing Typefi components in this mode. Deleting a component's Start or End Markers causes errors in the document that would result in page-composition errors or publishing failure). Use the Typefi Document Explorer (see "[Edit Section with Typefi Document Explorer](#)" on page 34) to verify that all Typefi components are still valid.

Global find/replaces

Tags can be useful, such as a situation in which you want to globally change Typefi markup. For example: (a) assign a new Element to an old Element; (b) apply a condition with a new name to old conditions; or (c) change a path reference for images. When displaying the document markup tags in the Word document, you will be able to perform global search and replace tasks throughout your document.

```
<Section-Name="Chapter".ID="821EB2C4-4A8C-5C4A-9A60-CFFB8C83B106"/>¶  
<SectionField-Name="ChapterNumber".Value="(AutoNumber)"/>¶  
<SectionField-Name="ChapterTitle".Value="Biography"/>¶  
<SectionConditions-Value="Teacher"/>¶
```

Typefi markup converted to Tags.

Convert to Fields

Fields are the default Writer markup that is used to display Typefi components in Word. Unless you want to specifically see the code behind the scene or the XML tags, you would always work in Field view mode when editing a Word document with the Typefi Writer.

View Field Codes

Viewing the Field Codes will display all of the complexity behind the default Field view. It's a little daunting to look at a Word document marked up with Typefi Writer in this mode, and you shouldn't attempt to edit the code manually.

Your document is easily viewed in its default Field view again:

- Click the **Tags** icon in the Typefi tab (see [screenshot](#))
- Choose **View Field Codes**

This command behaves as an on/off toggle and Shows/Hides the codes depending what is active or not.

Note: When Field Codes are displayed you will not be able to edit Typefi components by double-clicking them.

Re-Apply Styles

If your document contains any style overrides on Typefi Markup styles, the **Re-Apply Styles** command will reset these styles to match the formatting they have in the **Pick formatting to apply** list in Word.

To re-apply Typefi Markup Styles:

- Click the **Tags** icon in the Typefi tab
- Choose **Re-Apply Styles**

Reset Styles

If you have altered the appearance of the Typefi Markup styles in the active document, but want to reset these styles to their standard appearance, you can use the **Reset Styles** command.

```
SECTION:·Chapter¶  
ChapterNumber:·(AutoNumber)¶  
ChapterTitle:·Biography¶  
Conditions:·Teacher¶
```

View Field Codes disabled

```
{·MACROBUTTON·TPS_Section·SECTION:·Chapter(Name="Chapter".ID="821EB2C4-4A8C-5C4A-9A60-CFFB8C83B106")·}¶  
{·MACROBUTTON·TPS_SectionField·ChapterNumber:·(AutoNumber){Name="ChapterNumber".Value="(AutoNumber)"}·}¶  
{·MACROBUTTON·TPS_SectionField·ChapterTitle:·Biography{Name="ChapterTitle".Value="Biography"}·}¶  
{·MACROBUTTON·TPS_SectionConditions·Conditions:·Teacher{Value="Teacher"}·}¶
```

Field Codes displayed



The Tags button in the Typefi tab

To reset the Typefi Markup styles to their original settings:

- Click the **Tags** icon in the Typefi tab
- Choose **Reset Styles**.

Refresh Document

The Refresh Document option performs a series of tasks on a Word document that is linked to a Typefi Project:

1. Removes all Typefi document shading
2. Re-inserts all Typefi tags
3. Updates any obsolete document markup to the version 6.x format
4. Repaints all markup fields and markup tags using correct markup styles
5. Applies styles to all Typefi tags.

To refresh a Typefi document, click the Refresh icon  in the Typefi tab.

Typefi Explorer

The Typefi Document Explorer is a tool that can be used to view and navigate a document's structure. In addition, the Document Explorer is useful for editing purposes as well as a tool for checking the validity of a Typefi Writer document.

Navigation from Explorer

The Document Explorer may be used as a document navigator. There is a choice of two views – Outline or Category. You may find the Category view useful when dealing with one type of Typefi content, such as Elements. Whenever you click on an item in the structure part of the Explorer the cursor position jumps to this item in the Word document.

To display and use the Document Explorer:

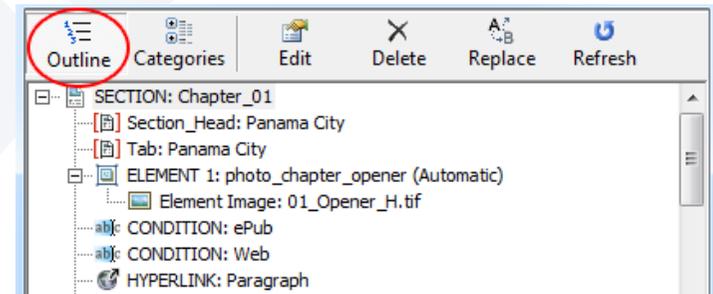
- Click the **Explore Document** icon  in the Typefi tab
- Choose whether to view the Outline or Categories
- Click the '+' icon to expand individual Sections/Categories, or display object structures such as an Element structure containing Fields, Image etc.
- Click the '-' icon to collapse an item in the structure

To navigate using the Document Explorer:

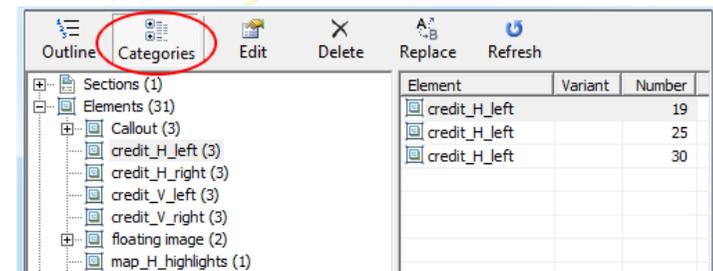
- Ensure you can see the document structure
- Click an object in the structure and the cursor will jump to that location in the document

Editing from Explorer

You have seen in most of the previous chapters that the Document Explorer may also be used as an editing tool. Not only can you locate an object in the document structure and select it, but then you can edit it.



Expanded Outline View in Explorer



Explorer's Category View with Elements expanded

When your cursor is inside the Typefi Markup on the Word page and you open the Document Explorer, the Explorer automatically jumps to the active object.

To edit a Typefi object using the Document Explorer:

- Either place your cursor in the Typefi markup for the object
- Click the **Explore Document** icon  in the Typefi tab.

(Alternatively: click the **Explore Document** icon in the Typefi tab and navigate to the object you want to edit)

- Next, click **Edit** to display the Object's Edit dialog and make the appropriate changes
- Click **OK** and click **Close** to return to the Word document.

Replacing with Explorer

Explorer is very useful for rapid replacement of any Typefi component (Sections, Elements, Conditions, Character and Paragraph Styles). You can use Explorer to replace ALL instances of one element with a different element type. With the exception of Paragraph and Character Styles, you can replace a component with nothing, thereby removing all instances of that component.

To replace all instances of any Typefi component:

- In the Typefi tab, click the **Replace** button 
- Select the type of Typefi component you want to replace from the 'Find What' list on the left
- Select the particular component sub-type from the list on the right (this list changes automatically to suitable choices)
- Choose its replacement from the **Replace With** list (leave empty to delete the component type)
- Click the **Replace All** button.

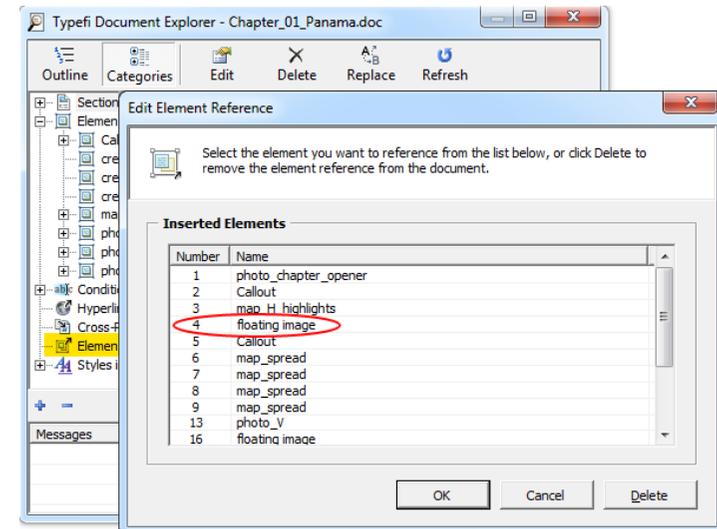
Deleting from Explorer

To delete a Typefi object using the Document Explorer:

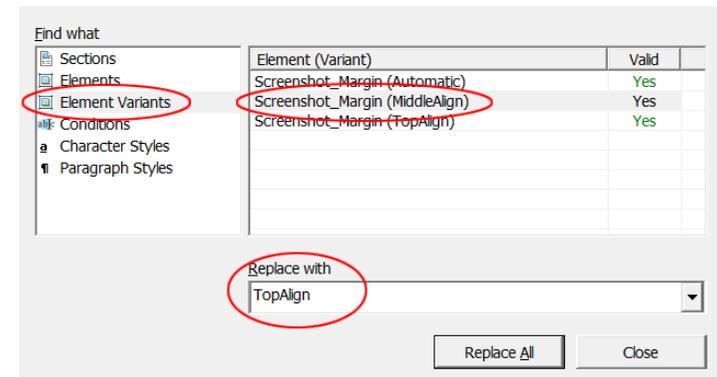
- Place your cursor in the Typefi markup for the object you want to delete, then click the **Explore Document** icon  in the Typefi tab

(Alternatively: click the **Explore Document** icon in the Typefi tab and navigate to the object you want to delete.

- Next, click **Delete** (the Delete 'Object type' message appears)
- Click **Yes** to delete the Object or click **No** to return to the Explorer
- Click **Close** to return to Word



Editing from Document Explorer.



Replacing all instances of an element variant (for example) with a different type of variant is possible using the Replace function.

Finding Errors

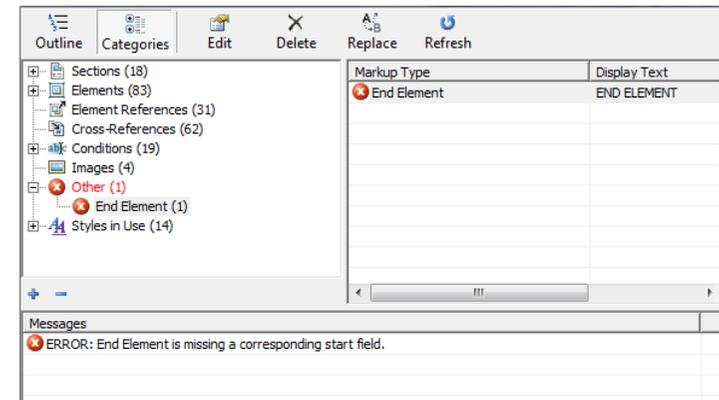
The Explorer checks whether Sections, Fields, Elements, Hyperlinks, Conditions and Cross-References in the active Word document are valid and will display a Warning or Errors in the Word document structure.

A warning appears as a yellow icon. It is advised to fix warnings although they will not prevent a document from being published.

An error appears as a red icon. It indicates a fault in a Typefi object that will cause the page-composition to fail or display incorrectly. You must fix all errors prior to publishing the Word document.

To display additional information about an Error or Warning:

- Click the item that is preceded by the warning or error icon
- The **Messages** part of the Document Explorer will now display a more detailed explanation of the problem.



Typefi Document Explorer with warning symbol indicating an error (missing start field from element content)

Publishing

The ultimate goal of authoring your documents in Word with the Typefi Writer is publishing professional quality output.

Saving Word documents

As with any digital document your files must be stored somewhere. Where you store Word files marked up with the Typefi Writer and linked to a particular Typefi project depends on the work processes used by your organisation.

Here are two basic scenarios:

Typefi Server

Saving and storing your files with the Typefi project on the Server assists in keeping all the project-related files in one location and allows you to publish content directly from the server by extracting sections from the Word documents and including them in a contents list for publication (see [the Typefi Server User Guide](#)).

Non-Typefi Server Locations

Files do not have to be stored on the Typefi Publish Server, and may be stored elsewhere on the network. However, to publish the documents through Typefi Publish, the Word user opening the marked-up documents must have a connection to the Typefi Publish Server and be a member of the project to which the file belongs.

Publishing from Word

When publishing a document from Word to Typefi Publish, you should be aware that only the content from the document itself will be published and the Typefi Engine will not be able to resolve Cross-References and Hyperlinks that point to other Word documents that are part of a project.

Typefi Print

To publish a document from Word, click the **Typefi Print** icon  in the Typefi tab. If the document contains any warnings or errors, Typefi Writer will alert you with a message.

- Click **Yes** to view the warnings in the Typefi Document Explorer and fix errors/warnings first
- Click **No** to ignore the warnings and proceed with the Print command.

The **Typefi Print** dialog appears. This dialog allows you to specify the Job option, PDF preset and Field data, and where the resulting PDF will be saved (click the **Settings...** button).

Job Option

The **Job Option** controls which particular template is used during the page-composition process, whether the document must start with a particular page number, how unresolvable cross-references are handled and more. Basically the choice of job option determines how the eventual output will appear (an EPUB can be produced this way).

PDF Preset

PDF Presets define the type of PDF file that is created upon completion of the page-composition process. The choices available are related to the settings installed and configured on the Typefi Publish Server (see [the Typefi Server User Guide](#)).

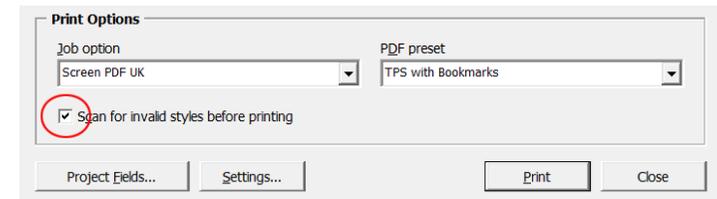
Generally PDF Presets are characterised by quality and purpose. For instance, a PDF Preset called **TPS with Bookmarks**, might be defined to create a PDF file that is small enough to be used online and that also adds some interactivity, such as hyperlinks, cross-references to interactive links, or a series of navigational bookmarks.

Project Fields

For Typefi projects that contain project field data, you can change the field values for the project fields by clicking the **Project Fields...** button. (The default field values are sourced from the Typefi project that is on the Typefi Publish Server).



Typefi Writer print warning dialog.



Typefi Print dialog.

Click the **Reset** button within the **Project Fields** dialog to reset the Field values to the same values as the values on the server. Alternatively, enter your own values. These are typically used to set text content such as a document title, copyright year, ISBN code, or book title as a running header during page-composition.

Settings

The Settings allow you to override the default location in which Word will save the PDF that is output during page-composition.

To change the location of published PDF documents:

- Click Settings...
- Click **Browse**...
- Navigate to the folder in which you'd like to store the files
- Select the folder and click **Select**
- Click **OK** to return to the **Typefi Print** dialog

FileManager messages

Once the Print command commences, the FileManager will display a series of messages.

When processing the job for printing, FileManager will prompt you to replace any images that have been modified or updated since they were last uploaded to the images directory. You can click **No** if you are sure that the images have not changed. This can save upload time...

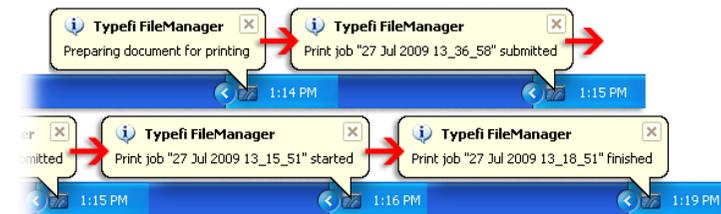
Click **Yes** to replace the image on the Typefi Publish Server, click **No** to retain the older image on the Typefi Publish server.

At this point, the Word document is converted to CXML which is loaded to the Typefi Publish server and is used as content during page-composition.

During the page-composition process on the Typefi Publish Server, you can continue to work in Word. When the job has been successfully published the FileManager will briefly display a message that the Print Job is finished, and a PDF will appear onscreen (if that is the Job output required).

Cancelled jobs

When a print job is cancelled during page-composition the Typefi FileManager will display a **cancelled** message.



FileManager pop-up messages

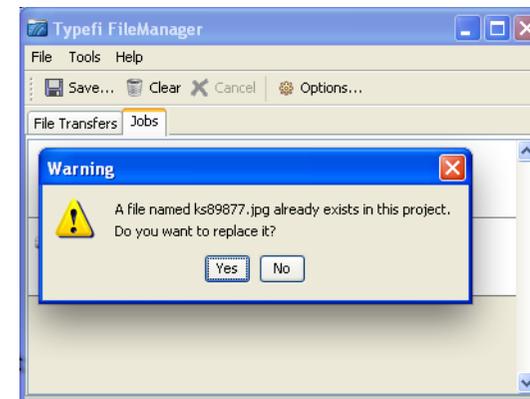


Image warning (this will happen regularly).



FileManager – Print job cancelled message