

Typefi® Publish 7

Typefi Publish 7 User Guide

January 2015



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Contents

Introduction to this Guide

Changes to User Interface	1
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Typefi Writer Settings

General	2
Printing	5
Save	6
Styles	6
View	6

Typefi Publish Server

Changes to Typefi Server	8
Round-tripping	9

Typefi Publish Designer

AutoFit panel	11
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Introduction to this Guide

This Guide details important changes to the user interface in Typefi Publish 7. Many of the other important changes in Typefi Publish 7 relate to performance and software improvements not visible to users, leaving most user techniques and processes unchanged since version 6. This Guide should therefore be used in conjunction with the existing Typefi Publish 6 User Guides (Writer, Designer and Server) which are all available on the Typefi FTP site (https://ftp.typefi.com/#/ftp-public/Typefi_Documentation/) and the Typefi website (<http://www.typefi.com/typefi-support/customer-portal/user-guides>).

Changes to User Interface

The user interface changes you need to be aware of are listed here:

- Typefi Writer Settings has modifications to the dialog
- Typefi Publish Server allows a choice of InDesign versions (CS6, CC, and CC 2014)
- Typefi Designer has a slightly different appearance in the new versions of InDesign CC

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; choose to load Typefi paragraph styles automatically; and specify the folder where Typefi AutoTag rules are located.

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

General

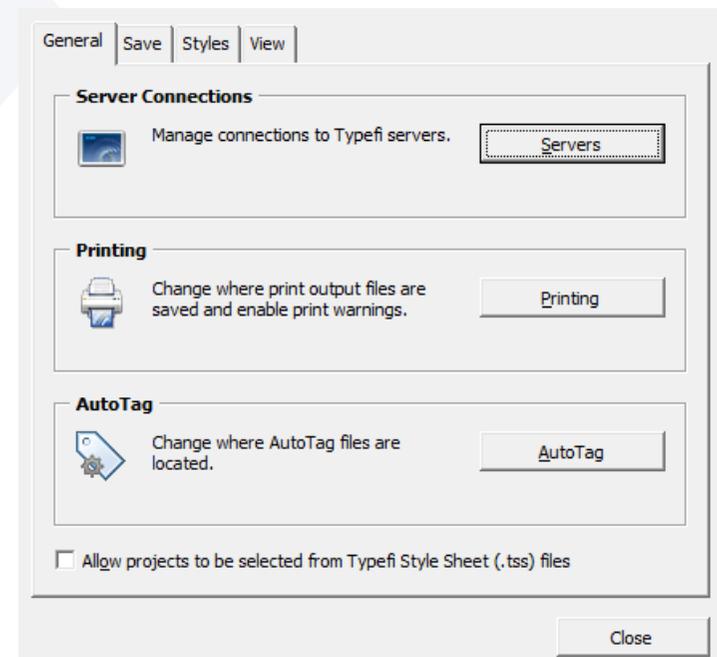
The General Tab in the Typefi Writer Settings dialog is used to:

- manage connections to the Typefi Publish Server
- choose the location for output files (such as PDFs) to be stored locally
- specify the location for AutoTag 'rules' files
- allow projects to be selected from Typefi Style Sheet files

It contains three buttons to access each of the dialogs.

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.



Typefi Writer General Settings – manage Server Connections, select Output Folder location and choose AutoTag rules location

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 the **Servers...** button in the General section of the Typefi Writer Settings dialog
- Click **Add...** (see [screenshot](#))
- 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 (see [screenshot](#))
- 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:

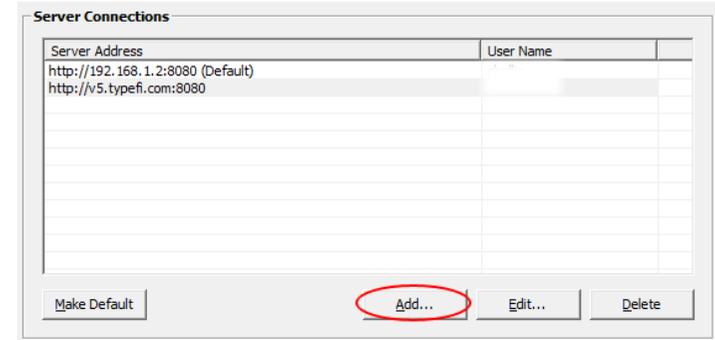
- Click **Close** to return to the Typefi Writer Settings dialog
- Click **Close** to close the Typefi Writer Settings dialog and finish managing Server Connections.

Editing a Server Connection

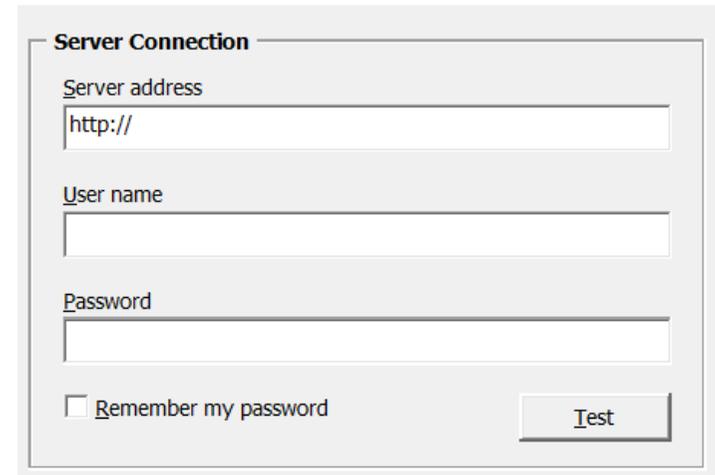
You can edit the server address, usernames, and passwords after a Server Connection has been added. In cases where the Server Address must be edited, you must delete the Server Connection and add a new Server Connection.

To edit a Server Connection:

- Click the **Settings** icon  in the Typefi tab
- Click **Servers...** in the Typefi Writer General 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**



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



Adding a connection to a Typefi Publish Server

- 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.

To delete a Server Connection:

- Click the **Settings** icon  in the Typefi tab
- Click **Servers...** in the Typefi Writer General Settings dialog and select the server to delete
- Click **Delete** and an alert dialog will appear
- Click **Yes** in the alert dialog 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.

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 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.

Printing

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
- Click the Printing button (see [screenshot](#))
- Click the **Browse...** button to the right of 'Folder Location' area
- Navigate to the folder where you want to store the files
- Once inside the folder, click **Select**
- Click **OK** then **Close**.

Typefi Style Sheet (.TSS)

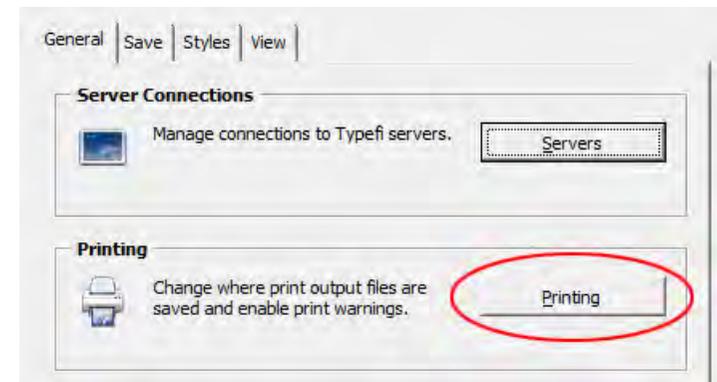
The Typefi Style Sheet (TSS) is an XML file that describes properties of a Typefi project. Typefi Writer needs a TSS file to populate its dialog boxes and to make decisions while working with a Typefi project.

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.

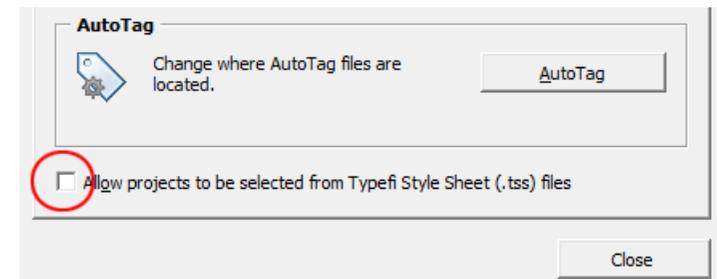
In an offline environment where a project cannot be selected from a server, a TSS file can be used as an alternate way of selecting Typefi projects.

To allow projects to be selected from TSS files:

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



Set the locations of the output PDFs by clicking the Printing button



The checkbox to allow projects to be selected by TSS is at the bottom of the Settings dialog

Save

This section of the Typefi Writer Settings dialog is provided to avoid the problems associated with using the Word .doc format. As the dialog explains, Word documents that are **uploaded to a Typefi server** must be DOCX (new XML format) for the process to work properly. **But it is not necessary if the Word files are remaining where they are.** Therefore, the setting only ‘warns’ you to use the format.

Styles

This new feature of the Settings dialog enables automatic copying of all Typefi paragraph and character styles into the Word document, and also gives the Typefi styles priority in the Styles panel by placing them at the top of the list of available styles. It is on by default, so turn it off if that doesn’t suit you.

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.

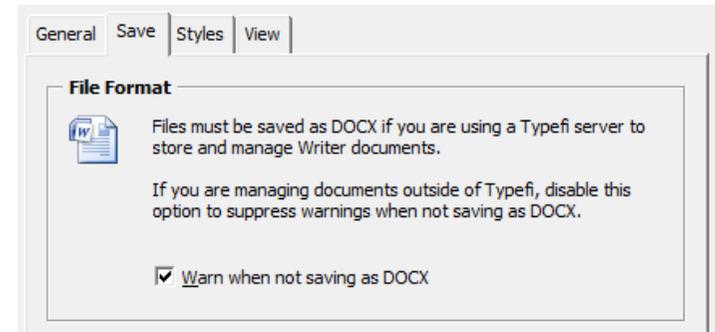
Images will display in Print Layout mode, but not in Draft or Outline mode. This change was introduced by Microsoft in Word 2010. There is a workaround, however. Save the file as Word 97-2003 format, then resave as .docx format. The images should now appear.

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

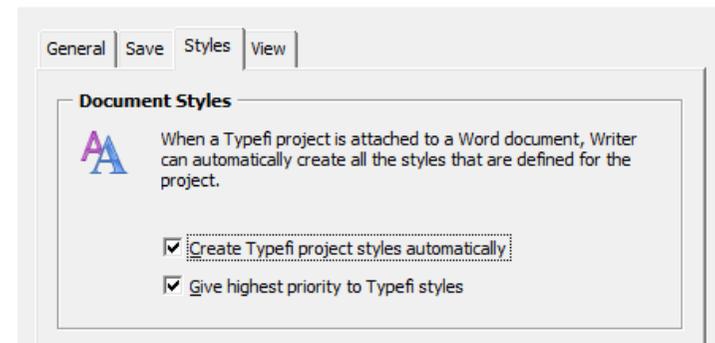
Since enabling this option may increase the amount of time it takes to manipulate some Word documents, you should keep this option disabled if you want to maximize speed.

To show image previews in Word:

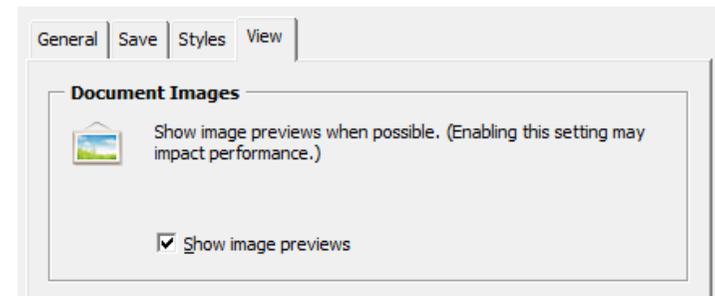
- Click the **Settings** button  in the Typefi tab
- Click **View** tab
- Enable **Show image previews**
- Click **Close**



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



The new Styles section of the Settings dialog, with both options selected



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

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.

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.

Typefi Publish Server

Changes to Typefi Server

The Typefi Server web interface has changed slightly due to new versions of Adobe InDesign being released. Since users may have InDesign CS6, InDesign CC, InDesign CC 64-bit and InDesign CC 2014* installed, they need to be able to specify the version Typefi Server should use to process jobs.

*The latest version of InDesign is not currently compatible with earlier versions of Typefi Publish 7. You must install Typefi Publish 7.3 or greater in order to use InDesign CC 2014 (version 10.1.0.70 or greater).

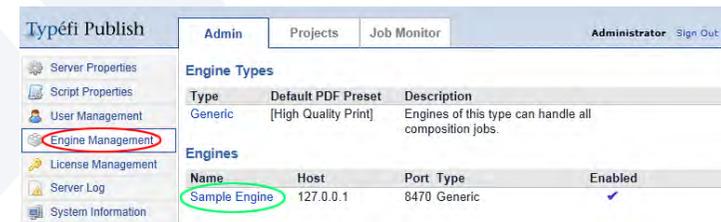
Choice of InDesign version

Within the 'Admin' section of the Typefi Server web interface, there is a choice of InDesign versions (depending on those that are installed). The choice you make will affect all jobs run from that moment onwards.

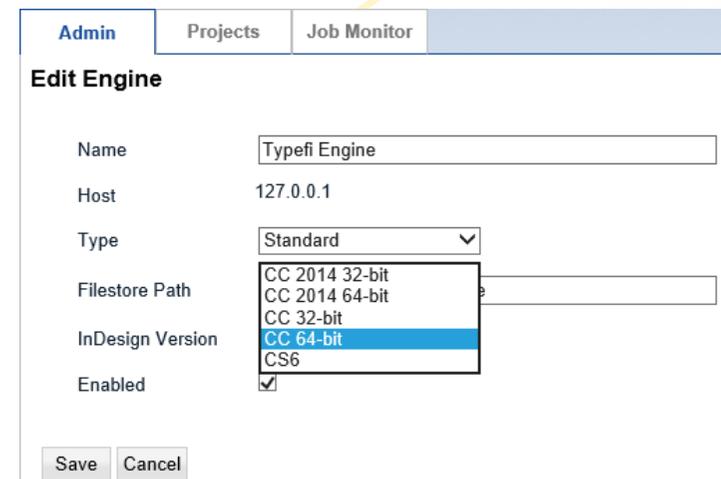
In order that the correct version of InDesign is launched when you open a template or output file, you may need third-party software such as *Soxy* by *Rorohiko* (<https://www.rorohiko.com/wordpress/downloads/lightning-brain-soxy/>).

To change the version of InDesign/InDesign Server used by the Typefi Engine:

- Click on the **Admin** tab at the top of the Typefi Server web interface
- Click on **Engine Management** at the left of the window (see *red circle in screenshot*)
- Click on the name of the Engine (see *green circle in screenshot*)
- Choose the InDesign version from the pop-up list (see *screenshot*)
- Click **Save** and return to Projects



The Engine Management section of Typefi Server Admin



Choose the version of InDesign to be used for running jobs

Round-tripping

'Round-tripping' has been re-introduced in Typefi Publish 7. It involves the process of publishing your Word content through Typefi Publish; making changes in produced InDesign files; and transferring these changes back into the Word content file.

The usual way to update content is by altering the original Word file – which doesn't allow changing content to suit the final look of the page. You have to guess what the final output might look like, and only see the result when the job is run.

There will be some consequences to round-tripping – the content file will lose all superficial formatting (while retaining the paragraph styles). Section breaks will appear in the Word file corresponding to the sections in the InDesign output file.

In order that InDesign can export the new content as CXML, an extension must be installed for either InDesign CS6 or CC (or both). It will be supplied by Typefi as necessary.

Here is a diagram that illustrates the process.

One of the requirements for roundtripping is that the Word documents you work with must be stored on the Typefi Publish Server and their sections extracted. (If you don't have access to the server, you can disregard this topic.)

Step-by-step round-trip process

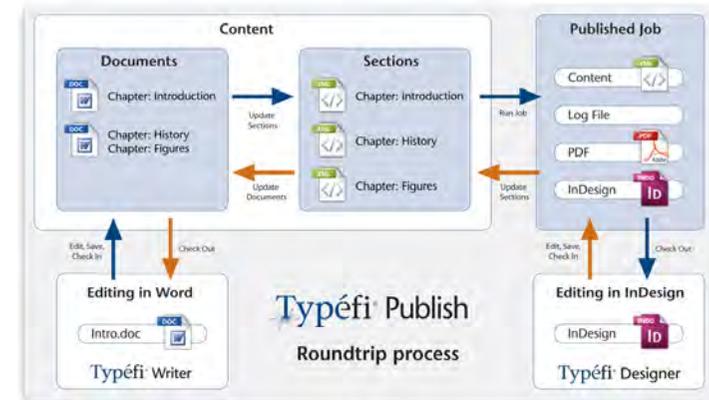
The diagram above gives a full process overview on how roundtripping works. These are the steps involved:

Step 1: Editing content in Word

Check out a Word document that has been added to a Typefi project, and make all of the required changes to the document.

Step 2: Save, Close, Check In

When you finish editing the document, save the file, close it and check it back into *Content/Documents*.



Typefi Publish roundtrip process diagram (start and finish in lower left corner)

Step 3: Update Sections

In order to publish the content from the checked-in document, select it in the **Content** area and click **Update Sections**. The section data will be extracted and visible in the **Sections** window.

Step 4: Add content to Job Option

- Click the 'Edit' button from the choices at the top (see *screenshot*)
- Select the new sections in the 'Selected Sections' area
- Click the right-pointing arrow between 'Selected Sections' and 'Available Sections' to move them into 'Selected Sections'
- Save the Job Option
- Select and run the same Job Option

Step 5: Editing in InDesign

- Locate the published job in the Jobs window
- Check out the InDesign file
- Make changes in the InDesign file (ensure you retain the Typefi content of the document)

Step 6: Save, Close, Check In

When finished with the edits in InDesign, save the file, close it and check it back in.

Step 7: Update Sections

Now it's time to extract an updated content version from the InDesign document and replace the old content in the Content/Sections repository. Select the InDesign File and click Update Sections.

Step 8: Updating the Word document (full circle)

Time for the round-trip stage. In Content/Documents, select the Word document you edited originally and click Update. Leave the Selected Sections as they are, leave 'Use Copies of Selected Sections' disabled and click Update. The Word document has now been updated.

Step 9: Round-trip complete

To verify that the round-trip has been successfully completed, check out the Word document and search for the modified content.

Typefi Publish Designer

AutoFit panel

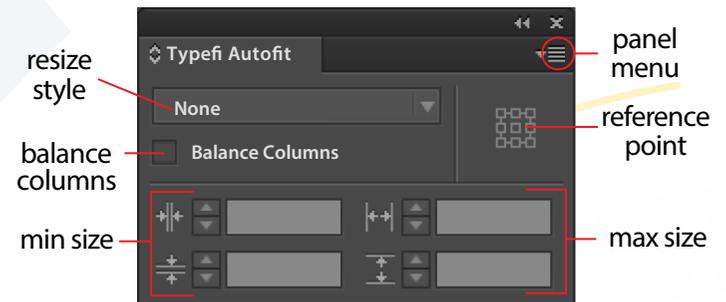
The AutoFit panel has been modified in Publish 7 to work seamlessly with the InDesign Text Frame Options—which now include the Auto-Size feature native to InDesign. Any changes made using Auto-Size will appear in the Typefi AutoFit panel. Most of these changes were available in version 6, but the new ‘dark’ interface is used here in illustrations, and some modifications made to the instructions.

The AutoFit panel is used to enforce minimum and maximum object size limits, and enable automatic resize styles for **text frames**. When combined with AutoFit parent/child relationships, the AutoFit panel options enable the design of adaptive layouts that dynamically react to content changes. In other words, you control which of the layout objects will automatically change to accommodate different content, and in what ways they may change.

Minimum and maximum object size

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

Regardless of the AutoFit minimum height, InDesign forces a minimum 3pt height for text frames. AutoFit uses the native ‘Balance Columns’ feature in InDesign CC, which can be activated within the AutoFit panel.



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

You can type limits into the fields, or click the minimum or maximum width or height buttons (icons at the left of the entry fields) to copy the measurements of a selected object. When multiple objects are selected, AutoFit copies and applies the measurements of each object as unique (to each object) limits. This saves you having to repeat the process for each object.

Removing object size limits

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

Reference Point

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

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

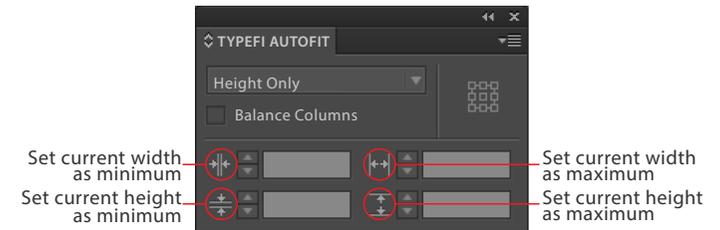
Automatic resize styles

While you can manually fit a text frame to its content by double-clicking any frame handle, AutoFit-enabled frames dynamically resize as content changes. AutoFit can also automatically balance columns for multi-column text frames (InDesign offers this in the General settings of the Text Frame Options dialog).

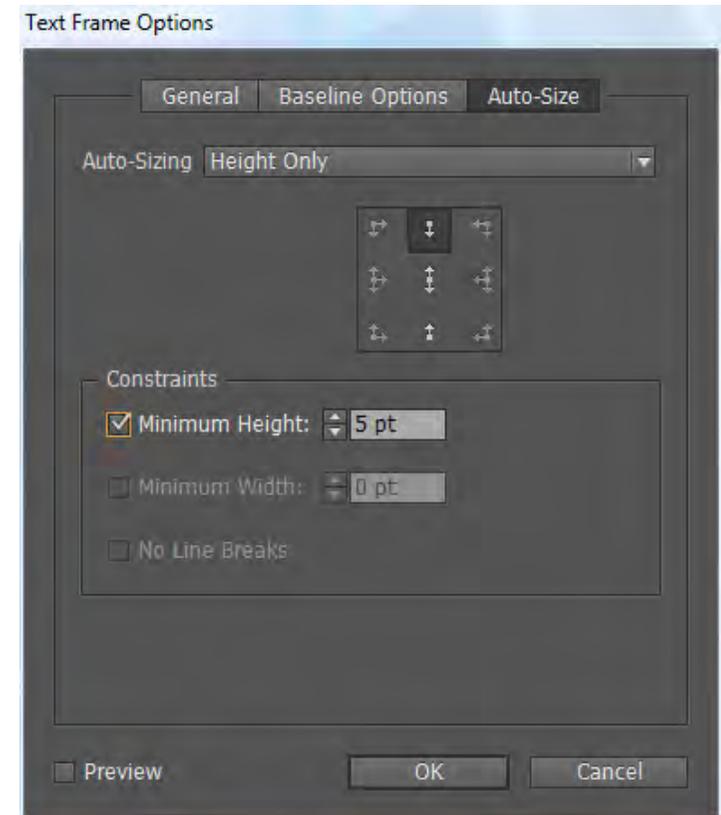
There are six types of AutoFit resize styles:

None (default) does nothing and is equivalent to a normal InDesign text frame (Use this option to turn off automatic resizing)

Height Only (Autofit) (meaning 'resize height only') modifies a text frame so that it changes size depending on the amount of text it holds. You can choose which reference point remains fixed (see ["Reference Point" on page 12](#)), but the frame will only grow vertically.



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



InDesign offers many of the same settings for text frames, but lacks a few important features offered by Typefi Publish AutoFit

(Note: The 'Height Only (AutoFit)' choice will only appear with documents created using earlier versions of Typefi Publish, and should not be used for new templates. Instead, use the following 'Height Only' choice.)

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

Width Only is the same as the InDesign Auto-Size setting.

Height and Width is the same as the InDesign Auto-Size setting.

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

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

Removing resize styles

To remove a resize style, change the frame to **None** or choose **Clear Attributes** from the AutoFit panel menu (the latter option will also remove any min or max size limits and any applied max vertical gap).

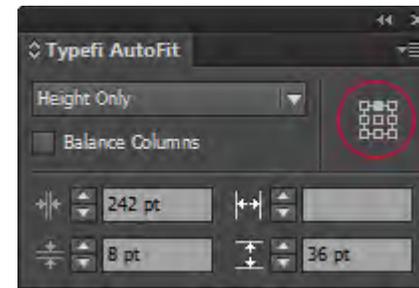
Vertical gap

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

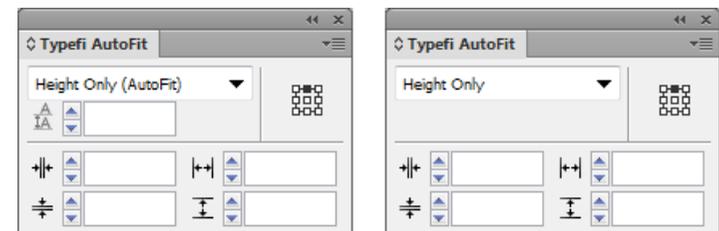
Publish 7 no longer calculates and automatically applies a maximum vertical gap when creating an AutoFit parent reference point on a text frame.

Scripting AutoFit

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



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



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