Chapter 1 Introducing QuarkXPress

In This Chapter

- Discovering menus, dialog boxes, and keyboard shortcuts
- Using the Tool palette and Measurements palette

When desktop publishing arrived in the 1980s, anyone could be a publisher. Anyone with a message could put it on paper and send it to the world, which revolutionized society in general (and business in particular). If you're about to use or are already using QuarkXPress, you, too, are taking up the cause.

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QuarkXPress has become the most used desktop publishing software in the world. Professionals have made QuarkXPress the corporate standard for magazine, newspaper, and catalog publishing. It is also an effective bookpublishing tool, thanks to its capability to index documents, and to create tables of contents and multichapter books.



The folks at Quark have upped the ante again with the release of QuarkXPress 6. This latest version, for Mac OS X and Windows 2000/XP, lets you

- Combine print and Web layouts in the same project
- Change your mind with the new multiple undo/redo capability
- Synchronize text so that a change in one text box automatically happens in corresponding text boxes elsewhere
- Convert print files to HTML format
- Create PDF files without using additional software
- ✓ See full-resolution previews of pictures in your projects
- Make production easier with layer locking, paste in place, and more contextual menus
- \checkmark Make two-position rollovers and cascading menus for Web pages
- ✓ Gain more control over Web text display through CSS font families

You may feel a little daunted by QuarkXPress. Relax. In this book, we walk you through the program to familiarize you with all it has to offer. You may be intimidated by projects and layouts or by the vast layers of panes, palettes, tools, and menus you see. Don't be. Working with QuarkXPress is like working with a new person at the office. Things may be awkward at first, but after you get to know each other, you find you can do great things together.

The Big Picture

QuarkXPress is a page layout program. You can use it to compose, or *lay out*, print and Web pages. You don't have to be a professional publisher to use QuarkXPress; it works for simple documents, such as letters and flyers that you print out by using your desktop printer. But it's powerful enough to handle high-end projects, like annual reports, magazines, and ads, and is used for such projects by professional publishers and designers around the world.

The paste-up method

QuarkXPress uses a paste-up metaphor for page design. It's ideal for creating text and graphic element blocks, placing them on a page, then resizing and positioning them until you're happy. First, you set up the basic project framework, including the page size and orientation, margins, and columns. You fill that framework with boxes that have text, boxes that contain pictures, and with lines. Figure 1-1 shows a simple page layout in QuarkXPress.

Items and content

QuarkXPress makes a distinction between *items* and *content*.

Items are things you draw on a page — squares, circles, lines, and wavy shapes — and then modify by filling them with color, changing their size or position, and the like. The primary items in QuarkXPress are picture boxes and text boxes, but lines, text paths, and tables are also used. You can import text and graphical content into some of these items.

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Content is *text* and *pictures*. (QuarkXPress calls any imported graphic a picture, whether the graphic is a logo, chart, line drawing, or photograph.) Content is always placed within an item. You can have items without content but you cannot have content without items.

Projects and layouts



Before QuarkXPress 6, the program's basic layout element was the document. Now *document* has been replaced by *project*, and the difference is significant. True, a QuarkXPress project can include a print document — such as a report or a book chapter — but it can also contain multiple print and Web documents. These documents are all stored in the same file, which is the *project*.

Inside each project are its *layouts*. A layout is a set of pages that have the same basic page setup (such as two-sided, $8\frac{1}{2}$ in-by- $10\frac{7}{8}$ pages) and content type (print or Web).

Designers like the project/layout concept because it lets them group related components into one file rather than having separate files for a single project. Consider some applications: A print magazine that has a foldout table in an article no longer needs a separate document for the foldout, with its different page settings. A company that creates print and Web versions of its annual report now has both versions in the same file for consistency. A business report can combine two-sided pages with single-page chapter dividers.

Pages and layers

Each project in QuarkXPress is made of pages. Depending on how you've set up the project, the pages may be side-by-side in spreads and may indicate margins and columns visually by blue lines. Usually, each page in a document is a page in a printed piece. You can also have multiple *pages* on a page, such as a page of business cards. Some pages in a project can be Web pages.

You can create layers for pages. These layers function like clear overlays that you can show, hide, and print as necessary. A layer applies to all the pages in a layout. Layers are handy for storing two different versions of text or graphics in the same document. They're also good for isolating so you can work on them without being distracted by other items on a page.

A Familiar Interface

When you first sit down at your computer to start using QuarkXPress, you'll no doubt notice that its interface bears a strong resemblance to that used by other Windows and Macintosh programs. If you use other programs, you already know how to use QuarkXPress components, such as file folders, document icons, and the menus at the top of the project window.

To create a project, choose File New Project. To open an existing project, choose File Open. The program displays a window similar to the ones shown in Figure 1-2.

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This book is for both Windows and Macintosh users. We use Mac screen shots, except where the QuarkXPress versions have significant differences. In those cases we show screens from both, as in Figure 1-2.

A project displayed in either Windows or Macintosh has these elements:

- ✓ The *Ruler Origin box* lets you reset and reposition the ruler origin, which is the point at which the side and top rulers are 0 (zero).
- The name of the open project and layout appears on the *title bar*, located below the menu bar on the Mac and above the menu bar in Windows. You can move the project window around in the screen display area by clicking and dragging the title bar.
- If you have reduced or enlarged a project, clicking the green Zoom box on the Mac, at the top-left corner of the project window, returns to its previous size. In Windows, click the Restore box, at the top-right corner of the project window.
- ✓ You can make a project all but disappear by minimizing it. To minimize a project, click the Minimize box in the document's title bar. On the Mac, it's the yellow button at top left: in Windows, it's the box with a horizontal line in it at top right.
- The vertical and horizontal rulers on the left and top of the window reflect the measurement system currently in use.
- ✓ The *pasteboard* is an area around the page. You can store text boxes, picture boxes, or lines on the pasteboard. Pasteboard items do not print.
- QuarkXPress displays a shadow around the page on the Mac, and a line around the page in Windows. These borders indicate the page edges.
- ✓ If you select Automatic Text Box in the New dialog box (accessed by choosing File⇔New⇔Project and choosing Print from the Default Layout pop-up menu), the first page of the new project has a text box.
- ✓ The View Percent field shows the magnification level of the page that's currently displayed. Press Control+V on the Mac or Ctrl+Alt+V in Windows to highlight the View Percent field. To change the magnification level, enter a value between 10 and 800 percent in the field; then press the Return key on a Mac or the Enter key on Windows (or just click elsewhere on the screen).
- Switch pages by using the *page pop-up* at the lower-left corner of the QuarkXPress project window. To use this pop-up, click the triangle.
- ✓ Use the *scroll bars, boxes,* and *arrows* to shift the page around within the project window.

If you hold down the Option or Alt key while you drag the scroll box, the view of the page is refreshed as you scroll the page.

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Close a project by clicking its Close box (the red close button at the upper-left corner of your open project window on the Mac; in Windows, the box that contains an X in the upper-right corner of the open window).

Macs also have the shortcut **#**+W; in Windows, use Alt+F4.

Menus

The menu bar appears across the top of the project window. To display a menu, click the menu's title. From the menu, you can choose any of the active menu commands. QuarkXPress displays inactive menu commands with dimmed (grayed-out) letters. When commands are dimmed, it means that these commands are not currently available to you — they're inactive.

To choose one of the active menu commands, hold down the mouse button as you slide through the menu selections. (You can skip using menus by using the keyboard equivalents for menu selections instead. Keyboard equivalents are displayed to the right of the command names in the menu.)



If an arrow appears to the right of a menu command, QuarkXPress displays a second, associated menu when you choose that command. Sometimes this secondary menu appears automatically when you highlight the first menu command. Just click the arrow to make the submenu appear. Figure 1-3 shows the Style menu and the secondary menu that appears when you choose the Size menu command.

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Dialog boxes

Some menu commands are followed by a series of dots called an ellipsis (...). If you choose a menu command whose name is followed by an ellipsis, a dialog box appears. Dialog boxes give you a great deal of control over how QuarkXPress applies specific features or functions to your project.

Some dialog boxes also contain submenus. If a menu has a submenu associated with it, an arrowhead appears to the right of the menu entry. In addition to submenus, pop-up menus appear when you make certain selections in a dialog box. Figure 1-4 shows a pop-up menu for text alignment.

QuarkXPress uses *panes*, a type of dialog box that merges several dialog boxes into one. In fact, you often see six or seven of these panes (similar to a file folder in an office cabinet) in a single dialog box. Like the file folders in an office cabinet, these panes organize a large amount of stuff in one tidy spot. Click a pane's tab (it looks just like a paper folder's tab), and the pane comes to the forefront, showing you the options for that pane. You see three tabs (Formats, Tabs, and Rules) on top of the dialog box shown in Figure 1-4.



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Working with contextual menus

Windows and Macs use a technique called *contextual menus* to save you time. By rightclicking an object in Windows, or Control+ clicking on the Mac, you get a menu of options just for that item. This saves you time going through menus, dialog boxes, and palettes. QuarkXPress 6 has added a number of new contextual menus, which you can use in relation to virtually everything in and around a QuarkXPress project. To use a contextual menu, simply press and hold the appropriate keyboard command and then click on the object you want to modify.

On the Mac, the default keyboard command to launch a contextual menu is Control+click. You can, however, change this keyboard command to Control+Shift+click by clicking Zoom in the Control Key area of the Preferences pane (QuarkXPress+>Preferences+> Interactive). If you have a third-party multibutton mouse, Mac OS X automatically sets the right-hand mouse button to be the Control+click or Control+Shift+click command.

To display a contextual menu in Windows, just right-click on the object you want to modify.

Because contextual menus require less mouse movement and menu searching and require less brain power (something we all want to conserve), contextual menus may soon replace keyboard shortcuts as the beeline of choice among QuarkXPress users.

Keyboard shortcuts

You can select some QuarkXPress functions through pull-down menus, some through palettes, some through keyboard shortcuts, and some through all three options. Most new users use menus. As you become comfortable, you can save time by using the other options (particularly keyboard shortcuts).

You can download our free, printable list, in PDF format, of keyboard shortcuts from this book's companion Web site, www.QXcentral.com.

Want to move from page one of a layout to page three? You can change pages by choosing Go To from the Page menu, or you can use the keyboard shortcut: Press and hold the Command key (%) or Ctrl key while you press the J key. In this book, we write this combination like this: %+J or Ctrl+J. The Macintosh shortcut appears first, followed by the Windows shortcut. If the platforms use the same shortcut, we list the shortcut just once.



In most cases, the Mac's **#** key and the Windows Ctrl key are the same, as are the Mac's Option key and the Windows Alt key. Shift is the same on both, whereas the Control key exists only on the Mac and has no Windows equivalent. The Mac's Return key is the same as the Windows Enter key. (Some Mac keyboards call this key Enter and some Windows keyboards call this key Return — no matter what it's called on your keyboard, don't confuse it with the keypad Enter key on the numeric keypad. To avoid confusion, we say *Return or Enter* for the key that inserts a new paragraph or activates a command, and we say *keypad Enter* for the key on the numeric keypad.)

The Tool and Measurements Palettes

One of the coolest features of the QuarkXPress interface is its set of palettes, which let you perform a wide range of functions on a layout without having to access pull-down menus. Like contextual menus and keyboard shortcuts, palettes are huge timesavers, and you'll undoubtedly find yourself using them all the time. Without a doubt, the Tools palette (see Figure 1-5) and the Measurements palette are the most commonly used. In fact, you'll probably keep these two palettes open all the time. You can find both palettes by choosing Windows Show Tools and Windows Show Measurements. The following text describes the contents of the two palettes.



The Tools palette



To use a tool on the palette, you first need to activate the tool. To activate a tool, simply click it. Depending on which tool you select, the cursor takes on a different look to reflect the function the tool performs. When you click the Linking tool, for example, the cursor looks like links in a chain.

Throughout the book, we explain in detail many of the functions you can perform with the Tools palette. The following sections are brief descriptions.

Item tool



The Item tool controls the size and positioning of items. In other words, when you want to change the shape, location, or presence of a text box, picture box, or line, you use the Item tool. (We discuss text boxes, picture boxes, and the like in detail later in this book.) For now, just keep in mind that the Item tool lets you create, select, move, group, ungroup, cut, copy, and paste text boxes, picture boxes, lines, and groups. When you select the Item tool and click on a box, the box becomes *active*, which means that you can change or move the box. Sizing handles appear on the sides of the active box; you can click and drag these handles to make the box a different size.

Content tool



The Content tool controls the *internal* aspects of items on a page. Functions that you can perform with the Content tool include *importing* (putting text into a text box or putting a picture into a picture box), cutting, copying, pasting, and editing text.

To edit text in a text box, select the Content tool. Then select the areas of text you want to edit by clicking and dragging the mouse to highlight the text or by using different numbers of mouse button clicks, as follows:

- ✓ To position the cursor: Use the mouse to move the I-beam pointer (it looks like a large capital *I*) to the desired location and click the mouse button once.
- ✓ To select a single word: Use the mouse to position the pointer within the word and click the mouse button twice.
- To select a line of text: Use the mouse to move the pointer within the line and click the mouse button three times.
- ✓ To select an entire paragraph: Use the mouse to move the pointer within the paragraph and click the mouse button four times.
- ✓ To select the entire document: Use the mouse to move the cursor anywhere within the document and click the mouse button five times.

When the Content tool cursor changes to a hand shape, you can use the tool to move the contents of the picture box around the inside the picture box. You can also use it to manipulate the picture's contents, such as applying shades, colors, or printing effects. Again, we discuss the ins and outs of text boxes and picture boxes in more detail in Chapter 5.

Rotation tool



Use the Rotation tool to rotate items on a page. Just click a text box, picture box, or line, and rotate it by dragging it to the angle you want. You also can rotate items on a page in other ways, such as entering rotation information in the Measurements palette and using the Modify command in the Item menu.

Zoom tool



You may want to change the magnification of a page on-screen. For example, you may need to make edits on text that is set in 8-point type; increasing the displayed size of the text makes seeing what you are doing as you work easier. The Zoom tool lets you reduce or enlarge the view you see in the project window. When you select the Zoom tool, the cursor looks like a magnifying glass; when you hold the cursor over the project window and click the mouse button, magnification of that section of the screen increases or decreases in increments of 25 percent. (To increase magnification, select the Zoom tool and click on the page. To decrease magnification, select the Zoom tool, hold the Option or Alt key, and click on the page.)

Another way to change the magnification of the page is to enter a percentage value in the bottom-left corner of the project window; when a page is displayed at actual size, the percentage is 100 (refer to the Mac screenshot in Figure 1-2, which shows 70 percent). QuarkXPress lets you select any viewing percentage, including those in fractions of a percent (such as 49.5 percent), as long as you stay within the range of 10 to 800 percent.

Text Box tools

QuarkXPress needs to have a text box on the page before it lets you type text onto a layout or import text from a word processing file. You can instruct QuarkXPress to create text boxes automatically on each page of the document, or you can create text boxes manually by using the Text Box tools. We discuss Text Box tools more in Chapter 3.

To create a text box, select the desired Text Box tool and place the cursor where you want the box to appear. Click the mouse button and hold it down as you drag the box to the desired size.

The arrow to the right of the Text Box tool's icon indicates that if you click and hold down on the Text Box tool, a pop-up menu shows other Text Box

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tools. Select any of these other tools, and it becomes the default tool of the Tool palette. The Text Box tools (as shown in Figure 1-6) function as follows:



Rectangle Text Box tool: Produces the standard rectangles in which most text is placed. The Rectangle Text Box tool should be the default tool for most users. To get a perfectly square text box, hold down the Shift key while drawing.



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✓ Rounded-Corner Text Box tool: Produces text boxes with rounded corners. You can adjust the degree of rounding (the *corner radius*) in the Modify section of the Tools section of the Preferences dialog box. (Choose QuarkXPress⇔Preferences⇔Tools on the Mac or Edit⇔ Preferences⇔Tools in Windows, and then click Modify.) To get a perfectly square text box, hold down the Shift key while you draw it.



- Oval Text Box tool: Produces a text box shaped as an ellipse. To create a perfect circle, hold down the Shift key while drawing your oval.
- ✓ Concave-Corner Text Box tool: Produces text boxes that are notched out in the corners. You can adjust the degree of notching, technically referred to as modifying the corner radius, in the Modify section of the Tools pane in the Preferences dialog box. (Choose QuarkXPress=> Preferences=>Tools on the Mac or Edit=>Preferences=>Tools, and then click Modify.) To get a perfect square with concave corners, hold down the Shift key while drawing.

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Beveled-Corner Text Box tool: Produces boxes with beveled corners, which appear as if they've been sheared off by diagonal lines. You can adjust the degree of *shearing*, also referred to as the *corner radius*, in the

Modify section of the Tool pane in the Preferences dialog box. (Choose QuarkXPress Preferences Tools on the Mac or Edit Preferences Tools, and then click Modify.) For a perfectly square beveled text box, hold down the Shift key while drawing the box.



Bézier Text Box tool: Named after the renowned French engineer Pierre Bézier, this tool lets you produce *polygons* (shapes composed of a series of flat sides) and *polycurves* (shapes composed of a series of curves) as well as shapes that combine both sides and curves. This tool works differently than the other Text Box tools: Rather than holding down the mouse, you click and release at each corner (or *node*, in graphics-speak). To complete the box, return to your first node and click on it (the mouse pointer changes from the default cross to an oval).



If you click and drag a little at each desired node, the Bézier control handles appear. These handles let you create a curve. You can have both straight and curved sides based on how you use the mouse at each node. The best way to learn to use Bézier curves (unless you are Bézier himself) is to experiment with them and get a feel for how they work.

✓ Freehand Text Box tool: Produces curved shapes composed of a series of curves. The box takes shape as you move the mouse, as if your mouse were a pen on paper. To complete the box, you usually bring the mouse back to the origin point and then release the mouse button. (Notice how the pointer changes to a circle from the normal cross.) If you release the mouse button before you return to the origin point, QuarkXPress automatically draws a straight line from where you released the mouse to the origin point. Using this tool, too, requires practice and a steady hand.

Picture Box tools

Picture boxes hold graphics that you import from graphics programs. As with text, QuarkXPress needs a box (in this case a picture box) on the page before you can import and manipulate a graphic on a page. You can create a picture box manually, using one of the QuarkXPress Picture Box tools. You select the Picture Box tool to use from the Picture Box pop-up menu in the Tools palette, place the cursor where you want the box, click and hold the mouse button, and drag the box to size. (We talk more about this in Chapter 3.) The following Picture Box tools work like their Text Box tool equivalents:



Rectangle Picture Box tool

✓ Rounded-Rectangle Picture Box tool

Oval Picture Box tool

Concave-Corner Picture Box tool.

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The Table tool

The Table tool lets you organize data into rows and columns (a *table*, if you will). Creating a table is much like creating a text or picture box. You select the Table tool in the Tools palette, place the cursor where you want the table, click and hold the mouse button, and drag it until the table is the approximate size you want. The Table Properties dialog box appears, asking you the number of rows and columns you want to include in your table and whether you want to fill the individual spaces of the table, called *cells*, with text or picture boxes. After you create your table, you can adjust it by choosing Item Addify and selecting options in the Modify dialog box and/or choosing Item Table and selecting options in the Table pop-up menu that appears. Chapter 8 covers creating and modifying tables in more detail.

The Line tools

The four Line tools in the Line Tools pop-up palette let you draw — you guessed it — lines. After you draw a line, you can change its thickness (*weight*) and/or style (line style is, for example, a dotted line).



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- Orthogonal Line tool: Produces straight lines that are completely horizontal or vertical.
- ✓ Diagonal Line tool: Produces straight lines at any desired angle. If you hold down the Shift key while drawing with it, the line is constrained to be perfectly horizontal, perfectly vertical, or at a perfect 45-degree angle. (The QuarkXPress manual just calls this the Line tool; we use the name Diagonal Line so that you don't mix it up with the other Line tools.)



- Bézier Line tool: Produces straight and curved lines, like edges created with the Bézier Text Box and Bézier Picture Box tools. A line section is straight or curved, depending on how you use the mouse at each node.
- Freehand Line tool: Produces curved lines that follow the motion of your mouse, similar to drawing with a pen on paper.

As with the Text Box and Picture Box pop-up palettes, you can change the arrangement of the Tools palette's Line tools to suit your style.

To use any of the Line tools, click the tool to select it and position the cursor at the point where you want the line to begin.

- ✓ For the Diagonal Line, Orthogonal Line, and Freehand Line tools, click and hold down the mouse button as you draw the line. When the line is approximately the length you want, release the mouse button.
- ✓ For the Bézier Line tool, click at each point, as described for the Bézier Picture Box and Bézier Text Box tools. If you click and drag for a little bit at each desired node, you see the Bézier control handles appear that let you create a curve. You can have both straight and curved sides based on how you use the mouse at each node. Again, we suggest that you play around with this tool to get the hang of it. After you draw a line, use the Measurements palette to select the line weight and line style.

Text Path tools

You can draw four kinds of *text paths* — lines that text will follow — to create text that flows in any direction instead of being confined within a text box. The Text Path tools work much like the Line tools; like the line tools, they are in their own pop-up palette in the Tools palette. (Because they work like their Line tool equivalents, we won't repeat the details.) They are:



Freehand Text Path tool

Orthogonal Text Path tool

Bézier Text Path tool

Line (or Diagonal) Text Path tool

Linking and Unlinking tools



Directly beneath the Tools palette are the Linking tool (above) and the Unlinking tool (below). The Linking tool lets you link text boxes together so that extra text flows from one text box into another. The Unlinking tool breaks the link between text boxes. Linking is very useful when you want to "jump" text; for example, when a story starts on page one and jumps to (continues on) page four. Chapter 3 covers linking and unlinking text boxes.

Scissors tool



The Scissors tool lets you *cut* shapes you have created with the Text Box, Picture Box, or Line tools. For example, you can use the Scissors tool to split a single line into two separate lines or to remove the corner of a box. This tool also comes in handy when you want to edit a shape you've created with the Freehand Text Box, Freehand Picture Box, or Freehand Line tool. You can cut lines made with the Text Path tools, too, although any text on the text path will remain linked, even if it is split into two entirely separate parts.

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Starburst tool

The Starburst tool lets you create a picture box in a star shape. This is used as a graphical element to draw attention to something on the page. A starburst shouts "Look at me!" For example, if you are designing a flyer about a new product, you can put a starburst with the word *New!* at the top of the page.

The Measurements palette

The Measurements palette is one of the most significant desktop publishing innovations; you'll use it all the time. It shows the precise position and attributes of any selected page element; you can enter values to change those specifications. To see the Measurements palette, you need a document open as you choose Window Show Measurements or press F9.



The information in the Measurements palette depends on the element currently selected. When you select a text box, the Measurements palette displays the text box position coordinates (X and Y), size (W and H), amount of rotation, and number of columns (Cols), as shown in Figure 1-7. By clicking the up and down arrows on the palette, you can modify the *leading* (space between the lines of text) of the text box (or you can simply type a value in the space next to the arrows); click the right and left arrows to adjust *kerning* or *tracking* (space between letters) for selected text.



Specify text alignment (left, center, right, justified, or force-justified) by using the alignment icons. In the type section of the palette, you can control the font, size, and type style of selected text.

For a picture box, the Measurements palette displays different information. In Figure 1-8, the Measurements palette shows the box position of the (X and Y), its size (W and H), the amount it is rotated, its corner radius, its repositioning coordinates (X+ and Y+), the amount of picture rotation within the box, and the amount of slant.

Figure 1-8: The Mea-													
surements palette when a text box is selected.	[○] X: Y:	11p10 1.417"	W: H:	14p9 1.778"	∆ K	0° 0p	•	X%: Y%:	100%	• X+ • Y+	0p 0"	<u>^</u>	0"

For a line or text path, the Measurements palette (as shown in Figure 1-9) displays the location coordinates (X and Y), line width, line style, and endpoint (line ending) style. The line style pop-up menu lets you select the style for the line. (If you use a freehand or Bézier line, an icon to control the line's rotation replaces the Endpoints section of the Measurements palette.)

Figure 1-9:

The Mea suremen palette for straight lir or text path.

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ts	OX1: 44.935 mm X2: 67.866 mm Endpoints 🗘 W: 1 pt	
а	Y1: 56.661 mm Y2: 56.661 mm	
ne		

If you select a Bézier or freehand element's node or curve, you get controls for the nodes, as in Figure 1-10. Chapter 12 explains what the controls do.

Figure 1-10: The Measuremer palette a no

segment.

irements	O X: 101.915 mm	W: 3.786 mm	<u>⁄^</u> 0°	XP:	104.907 mm	∠	-132.899°	≛	-45°
alette for	Y: 69.86 mm	H: 2.817 mm]	YP:	70.115 mm	٠	0.484 mm	•	0.859 mm
a node									
or curve									