Introducing QuarkXPress

QuarkXPress 6 is a powerful and complex program, and whether you’re new to the subject or an old hand, it’s best to begin at the beginning. This chapter details the wide range of uses QuarkXPress is being put to around the globe, points out the ways in which QuarkXPress can be of use to you, illuminates the key new features of version 6, and describes the basic metaphor on which the program is based. There’s also a comprehensive list of the terms — clearly and concisely defined — that we use throughout the book. So whether you’re an expert or novice, please read on and prepare yourself for a great adventure.

Looking at What QuarkXPress Can Do

QuarkXPress is used by a long and impressive list of people. Nearly three-quarters of all American magazines — including Rolling Stone, Folio:, Wired, US, Macworld, and Reader’s Digest — are produced with QuarkXPress, as are many newspapers around the world. It’s also the best-selling page layout program among professional design firms. QuarkXPress is the leading publishing program in Europe, and the international version of QuarkXPress — QuarkXPress Passport — supports most Western and Eastern European languages. There’s also a version for East Asian languages — Japanese, Chinese, and Korean.

This edition of the QuarkXPress 6 Bible includes many new layout and production tips culled from experienced QuarkXPress designers, including about a dozen extended expert techniques where designers share their production secrets.
What does this information mean for you? It means that QuarkXPress can handle sophisticated tasks such as magazine and newspaper page layout, as shown in Figure 1-1, while its simple approach to publishing also makes it a good choice for smaller projects such as fliers and newsletters.

![Figure 1-1: Folio: magazine is just one of the thousands of magazines and other publications that use QuarkXPress.](image)

QuarkXPress can also be a good choice for corporate publishing tasks such as marketing collateral, ads, proposals, and annual reports, some of which are often distributed via print, Adobe Acrobat Portable Document Format (PDF), and the Web. Long-document features make it a viable tool for books and other lengthy publications. Using QuarkXPress puts you in good company.

**Discovering the QuarkXPress Approach**

QuarkXPress is considered to be a page layout program. But what does that mean? What can you do with it and how do you do it? Well, you can do everything from writing letters and printing them on your laser printer to designing high-end glossy
magazines that you send out for color separations and four-color printing. And, in QuarkXPress, you can go beyond print to designing Web pages, PDF documents, and XML (Extensible Markup Language) content. (XML content is media-independent and can be output in a number of ways.) But, due to the paste-up method that lies behind designing in QuarkXPress, it is better suited to some projects than others.

The paste-up method

You build pages in QuarkXPress using the paste-up method — so it literally feels as if you’re creating little blocks of text and graphic elements, placing them on a page, and then resizing and scooting them around until you’re satisfied. First, you set up the basic framework of the project, including the page size and orientation, margins, number of columns, and so on. You then fill that framework with boxes that contain text, boxes that contain pictures, and with lines, as shown in Figure 1-2.

Figure 1-2: This Macworld table of contents contains boxes for pictures and text, as well as ruling lines.

Because of the emphasis on boxes, QuarkXPress is considered to be a box-based program. Although the idea of text boxes, picture boxes, and lines sounds simple and straightforward, in the right hands it can generate truly impressive results. These page elements are explained further in the “Speaking the Language” section of this chapter.
The right — and wrong — projects for QuarkXPress

Like other programs, QuarkXPress has its strengths and weaknesses. For example, it’s great for producing a brochure that requires color separations and trapping. On its own, it’s not so great for a textbook that requires scientific equations and footnotes. You can, however, meet special needs such as these by adding features with XTensions, which are plug-in modules for QuarkXPress.

Although you can adapt QuarkXPress to almost any publishing need, its roots in layout and print can cause problems. With the paste-up method and the emphasis on boxes, the items you place on pages in QuarkXPress can end up being tied to the pages. So changing or multipurposing the content has been difficult in the past (although the XML support may help change that). In addition, QuarkXPress has a lot of features and may be too much to learn for simpler projects.

In general, the following projects are ideal for QuarkXPress:

- Anything printed in four colors or more
- Books with a high level of design such as coffee-table books
- Magazines and newsletters
- Corporate identity pieces: letterhead, envelopes, business cards
- Marketing collateral, brochures, and fliers
- Advertisements and posters
- Novelty items and packaging
- Content that may need to be output in many different forms: print, PDF, Web, and so on

The following projects may not fare as well, at least without XTensions:

- Books with footnotes and more complex indexes
- Books with headers and footers that change with the page content
- Text that includes scientific equations
- Text that relies on automatic numbering, such as an outline, or many numbered steps that change often
- Letters or articles that need to be distributed to many people for customization (stick with Microsoft Word for this type of thing)
- Publications with a low level of design but a high level of editorial demands (such as tracking changes)
When deciding whether to use QuarkXPress, remember the old saying — use the simplest tool for the job. Writing letters to friends in QuarkXPress is surely overkill, but forcing Microsoft Word to lay out brochures is painful. And keep in mind that just because QuarkXPress can do something doesn’t mean it will do it exactly the way you want it or need it. Be prepared to experiment, adjust your workflow, and add XTensions before solving your unique publishing situations.

The Publishing Workflow

Obviously, your publishing workflow will depend largely on where you work and what you’re creating. A one-person newsletter operation will have a significantly different workflow than a national newsmagazine. And a graphic designer creating ads will work differently than a textbook publisher. But, in general, most workflows reflect the need to play to a program’s strengths. This means, you let each program in your publishing environment do what it does best. So you:

✦ **Write in a word processor.** Even if you’re working alone, you’ll benefit from writing and editing text in a word processor. You can take advantage of the superior spell checker and revision tracking in a program such as Microsoft Word — while concentrating on the words rather than the layout. Then, import the text into QuarkXPress for formatting.

✦ **Draw in an illustration program.** Yes, you can make curvy items in QuarkXPress and combine text and graphics in dramatic ways. But for the ultimate flexibility, use an illustration program such as Adobe Illustrator for your line art. You can then use the picture file in as many places as you want.

✦ **Prepare pictures in an image-editing program.** Whether you’re starting with scans, images from Photo CDs, files from digital cameras, or images you’ve grabbed from the Internet, you’ll generally need to save the picture in an image-editing program. Again, QuarkXPress does give you some cropping, resizing, and retouching tools. But most images will benefit from the professional tools in a program such as Adobe Photoshop.

✦ **Pull it all together in QuarkXPress.** QuarkXPress is the place to design your layout — the way your text and graphics interact with each other and with other elements on the page. Once you get the structure of your pages in place, you can start collecting the text and graphics files (from yourself or from others), importing them into the QuarkXPress document, and formatting them as you like.

✦ **Print proofs, make revisions, and perform final output from QuarkXPress.** Whether your project will be printed on your laser printer or color separated onto film by a service bureau, this is one of the reasons you’re using QuarkXPress — for reliable output.
Welcome to QuarkXPress

In a Web environment, there are great tools for creating Web pages and maintaining Web sites' organization and standards. QuarkXPress can produce Web pages, but rarely will it be your primary Web development tool. Instead, think of it as a great tool to convert print documents to Web form that your Web developers will further refine and integrate into your Web site via specialized Web publishing tools and HTML editors.

In a workgroup, many of the steps in the publishing process are happening at the same time. Writers are writing, artists are creating graphics and illustrations, and photographers are submitting pictures. Meanwhile, a graphic designer is producing the shell of a publication. When the contents are ready, he or she pops them into place and makes them look good. Figure 1-3 shows the various components that make up a QuarkXPress document.

But the beauty of QuarkXPress is that you don’t have to work this way. You can do everything in QuarkXPress. If you’re a one-person, one-program shop, you can still get a lot done. You can write in QuarkXPress, edit in QuarkXPress, import pictures from a Photo CD directly into QuarkXPress, and be done.

Speaking the Language

To understand the way you put pages together in QuarkXPress, it helps to know exactly what makes up a page. And if you can call the items on the page the same thing that we call them — and the same thing that Quark calls them — it’s easier to communicate with other users and to look things up when you’re confused.
QuarkXPress documents for print consist, primarily, of pages, items, and contents. To make these things look good, you use item attributes and styles. We’ll take a quick look at each.

See Chapter 37 for information about the basic components of Web documents.

Projects and layouts

One of the biggest changes in QuarkXPress 6 is the concept of projects. Gone is the old QuarkXPress term “document.” What’s the difference? Plenty. A project can be made up of a typical print document, such as a magazine feature or a book chapter—the definition of a document in previous versions of QuarkXPress. But it can also be composed of multiple print documents, multiple Web documents, or a combination of print and Web documents. These are all stored in the same file, the project.

QuarkXPress 6 calls each of these project components layouts. A layout is essentially a collection of pages that have the same basic page setup (such as two-sided, 8⅛”×10½” pages) and content type (print or Web).

The project/layout concept is more than a semantic change. It lets designers group related components into one file, rather than have separate files for one 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 print magazine that makes Web versions of its features can now have the print and Web versions in the same file, making it easier to ensure consistency. A business report can combine two-sided pages with single-page chapter dividers.

In QuarkXPress 6, you work on one layout at a time—as if they were separate documents—and you can convert a layout to another form (size, single-sided versus two-sided, and Web to print or print to Web) at any time.

Pages and layers

Each project in QuarkXPress is made up of pages, which are outlined on your screen in black. Depending on how you’ve set up the project, the pages may be side-by-side in spreads and they may have margins and columns indicated by blue lines. Generally, each page in a document will end up being a page in a printed piece. But, sometimes you’ll have multiple “pages” on a page, such as with a trifold brochure on an 8½”×11” page or a page of business cards. Some pages can also be Web pages.

You can create layers for pages, which function like clear overlays that you can show, hide, and print as necessary. When you create a layer, it 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 items so you can work on them without being distracted by other items on a page. A page consisting of several layers is shown in Figure 1-4.

**Figure 1-4:** This *M-Business* product directory page consists of one layer for the pictures and one layer for the text.

**Items and contents**

To really understand QuarkXPress is to understand the distinction it makes between items and contents. Items are things you draw on a page — such as squares, circles, lines, and wavy shapes — and then fill with color, stroke (frame), rotate, and so on. You can also import text and graphics — contents — into items. The primary items in QuarkXPress are picture boxes and text boxes, but there are also lines, text paths, and tables.

Contents, as mentioned, are text and pictures. (QuarkXPress calls any imported graphic a picture, whether it’s a logotype, a chart, a line drawing, or a photograph.) Contents are always placed within an item — so you can have items without contents but you cannot have contents without items. Figure 1-5 shows a picture (content) moving around within its box (an item).
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Figure 1-5: A picture box is an item and the picture you import into it is its contents.

The reason you need to understand the distinction between items and contents is that QuarkXPress provides different tools and menus for handling them. The two primary tools at the top of the Tool palette, the Item tool and the Content tool, are designed to work with their respective page elements. (Although as QuarkXPress has evolved, the tools have become increasingly flexible and their functions now overlap quite a bit.) Generally, you select and manipulate items such as boxes with the Item tool. And you select and modify text and pictures with the Content tool. QuarkXPress also provides the Style menu for modifying the look of contents and the Item menu for modifying the look of items.

Item types

The broad category of items in QuarkXPress consists of primarily boxes and lines. You can create, format, and manipulate boxes and lines in basically the same ways — the primary difference among the different types is what you can put inside them. Figure 1-6 shows each type of item in QuarkXPress. You can create the following types of items in QuarkXPress:

✦ **Text boxes.** A text box is a container for text. You need to create one to type, paste, or import text.

✦ **Picture boxes.** A picture box is a container for any graphic that originated outside QuarkXPress (in Adobe Photoshop, for example).

✦ **No-content boxes.** A no-content box is a box that cannot contain text or pictures; they are primarily used for colored backgrounds and shapes.
Welcome to QuarkXPress

✦ Lines. A line is just what it sounds like—a straight, diagonal, curvy, or irregular line that you draw on the page as decoration.

✦ Text paths. A text path is like a line in shape, but you can flow text along it.

✦ Tables. A table is really a series of grouped and linked text boxes, which you can use to format or import data.

If all this sounds incredibly structured, you'll be happy to know that the items are flexible. You can convert the type of any boxes, so if you start out with a no-content box, you can convert it to a text box. If you draw a nice curved line, then decide to flow text on it, you can convert it to a text path. And if you draw an exquisite closed shape with a line tool, you can convert it to any type of box so it can have contents.

Attributes and styles

By themselves, items and contents don't look like much. It's the attributes you apply to the items and the styles you apply to the contents that bring your documents life.

Item attributes

Aside from adding content, you can do two basic things to items: add color and stroke them. For boxes, you add a background color. To stroke boxes, you actually specify a frame, including its width, line style, and colors. For lines and text paths, you simply pick a color, width, and style. Of course, you can do a lot of other things to items themselves, including rotating and skewing them. The Item menu, and in particular the Modify command, provides the controls you need for applying attributes to items.

For frames and lines, QuarkXPress provides various styles such as double lines and dots, and it lets you create your own patterns with its Dashes & Stripes command (in the Edit menu).
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Most publishing and graphics arts programs use the term stroke to mean adding a border to an item, whether it's a box or line. QuarkXPress never uses that term, preferring frame for strokes on boxes and simply width for strokes on lines and text paths. To make matters more confusing, other programs use the term frame for what QuarkXPress calls a box. When it comes to QuarkXPress, remember that a shape is a box and the border around it is a frame.

Text and picture styles

QuarkXPress provides all kinds of styles for formatting text and manipulating pictures. You can select and apply options such as fonts, sizes, underlines, justification, and much more to text. And you can resize, distort, and flip pictures at will. When text is selected, the Style menu for text, shown in Figure 1-7, provides all the options. (You can even save most of the formats you apply to text in style sheets through the Edit menu.) When a picture is selected, the Style menu for pictures, shown in Figure 1-8, provides options specific to that type of picture.

![Figure 1-7: The Style menu for text](image)

Tip

Most publishing and graphics arts programs use the term stroke to mean adding a border to an item, whether it's a box or line. QuarkXPress never uses that term, preferring frame for strokes on boxes and simply width for strokes on lines and text paths. To make matters more confusing, other programs use the term frame for what QuarkXPress calls a box. When it comes to QuarkXPress, remember that a shape is a box and the border around it is a frame.
What’s New in Version 6

The most significant change from QuarkXPress 5 to QuarkXPress 6 is the new project approach to multi-layout documents. Or maybe it’s the capability to create production-quality PDF files without needing Adobe’s Acrobat Distiller software. Or maybe it’s the new synchronized text feature, where text that is used in multiple places has one master source that, if changed, updates all versions of it, even though they have different text and paragraph styles applied to them. Or maybe it’s the fact that QuarkXPress now supports multiple undos and redos. Or maybe it’s the fact that QuarkXPress 6 is Mac OS X–native — “Carbonized,” in Mac lingo. These are all significant advances for QuarkXPress, and the most significant depends on what’s most important to you.

QuarkXPress also has enhancements scattered throughout the program. For example, Web-page creators can now make two-point rollovers and have dynamic page links. Print designers can truly lock items on layers, paste a copy in the same location as the original (paste in place), see full-resolution previews of images, get smoother output of blends, and better work with tables.

Despite the significant new functionality and the refinements to the program, QuarkXPress designers will find that the basics haven’t changed dramatically—you’ll find some new features and some interface changes, but nothing that will trip you up. If you’re making the transition from version 5 to version 6, skim through this section to familiarize yourself with QuarkXPress 6.

Application-level changes

The new projects and layouts approach to document creation allows multiple-size pages in one project, as well as print and Web documents in one project. This brings with it a new menu, Layout.
Multiple undos and redos is another powerful change in version 6, letting you go back several steps and even undo multiple steps at once.

QuarkXPress 6 also abandons older operating systems: It now supports only Mac OS X, Windows XP, and Windows 2000. You can save projects into QuarkXPress 5-format document files—each layout is saved as a separate document—for compatibility with users on Windows 95, Windows 98, Mac OS 8.x, and Mac OS 9.x.

In the Macintosh version, QuarkXPress 6 now has the Window menu that the Windows version has had for some time. This menu lets you get a list of open projects, as well as display and hide the many palettes. QuarkXPress for Windows added this menu in version 4, although it didn’t manage the display of palettes until version 6.

QuarkXPress 6 for Macintosh has a new QuarkXPress menu that contains the Preferences menu option. This change conforms to Mac OS X’s interface standards.

New features

In addition to refining existing tools and capabilities, Quark has introduced additional features to make working in QuarkXPress 6 more efficient and exciting. The new features are as follows:

✦ Synchronized text. This feature provides a way to handle boilerplate text more efficiently. Such boilerplate copy could include copyright lines, page folios, legal statements, product names, navigation bars, and other text that needs to be consistent throughout a document. Even though text changes are automatically applied to all instances of the synchronized text, you can apply separate paragraph and character styles to the various uses of the synchronized text and have those retained even when the text changes.

✦ Native PDF export. Exporting PDF files no longer requires that you own a copy of Adobe Acrobat Distiller. Instead, Quark has built the PDF-creation code right into QuarkXPress.

✦ Full Resolution Preview. This feature lets QuarkXPress 6 display pictures onscreen using the picture file’s full resolution. This lets you scale or magnify the image with minimal pixelation and lets you create more accurate QuarkXPress clipping paths.

✦ Paste in Place. The new Paste in Place command in the Edit menu lets you copy items to the same coordinates as the original—very handy when copying an item from one page to another. Before, the copy would appear in a seemingly random location, so you’d have to know the X,Y coordinates to move it to after making the copy.
Enhanced features

Quark has refined several of the features introduced in version 5, making them more powerful and easy to use.

Tables

You can now link table text cells to one another, or to any text box in a layout, for more flexible text flow. You can now set the tab order of cells, letting you move from cell to cell in the order that makes most sense for you.

Cells and gridlines can now assume the attributes of adjacent cells, saving you time when inserting rows or columns that have the same formatting as adjacent rows and columns. QuarkXPress 6 can remove gridlines, so that table cells abut one another, and snap to a table gridline to onscreen guides for precise positioning.

Quark has also made subtle changes to how you apply color to table elements — such as cells, the table box, and gridlines — to ease formatting. Also, you can now apply clipping settings to pictures in picture cells.

You can convert a table to a group, which is useful when you save a layout containing features that are not supported in previous versions of QuarkXPress.

Layers

The Print dialog box now lets you specify which layers print. Even though you can still check Suppress Output in the Attributes dialog box for each individual layer, the addition of layer-printing controls in the Print dialog box lets you easily choose on the fly what to print.

Quark has enhanced how layers’ Suppress Output settings work. A layer’s Suppress Output setting now overrides, but doesn’t modify, the Suppress Output settings for each individual item on that layer. Thus, when you check Suppress Output for a layer, none of the items on the layer print. And when you uncheck Suppress Output for a layer, QuarkXPress honors the individual Suppress settings for each item on that layer.

The locking behavior of layers is also improved. When you lock a layer, QuarkXPress prevents items on the locked layer from being selected or modified. All the items on the layer are locked. When you unlock it, QuarkXPress honors the Lock setting for each item on that layer, which was designed to prevent accidental repositioning of items via the mouse but allowed designers to change box and other settings through palettes and dialog boxes.

A new command, Select All Items on Layer, is now available in the Layers palette context menu.
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Printing
To print smoother blends when you output to a PostScript Level 3 device, QuarkXPress 6 supports SmoothShading, which lets you print gradients without using separate bands and static halftone values, resulting in improved quality in printed blends from many devices.

QuarkXPress also supports As Is color, which retains the source color space during output to a PostScript composite color device. This lets you manage color output at the final printing device. You can apply As Is color to printed projects and EPS files that you create in QuarkXPress.

The new support for Adobe PostScript’s DeviceN capability lets you output blends, multi-inks, colorized TIFF images, and other items as composite color while retaining their color-separation definitions. This lets you print proof copies on composite devices such as inkjet and thermal-wax printers while retaining separation information for eventual output to CMYK negatives or plates. You can apply DeviceN to EPS files that you create using the QuarkXPress Save Page as EPS dialog box.

Web pages
You can create page-to-page hyperlinks within a print or Web layout. You can also now use the Append feature to import hyperlinks into a project. Quark has enhanced the Hyperlinks palette so you can specify how the palette displays hyperlinks and anchors.

QuarkXPress 6 supports cascading menus, so you can create Web pages with a comprehensive user interface. Using cascading menus lets you simplify your design by “hiding” menu items until the user moves the mouse pointer over a specific item.

The program also now supports HTML cascading style sheets, which specify fonts for Web browsers to use, providing a series of alternatives if the browser doesn’t have your first choice.

The two-position-rollovers feature of QuarkXPress 6 lets you add greater visual interest to your Web pages. Because a two-position rollover lets you specify separate origin and target boxes, you can make rollovers from text or picture boxes in different areas of the page. For example, when a user passes the mouse over a menu item, not only will that menu item’s color change as was possible using the previous one-position-rollovers feature, but it will also let a text or picture box become active, such as to show submenus or highlight options elsewhere on the page.

To make previewing and exporting layouts more convenient, HTML Preview and HTML Export features have been added to the context menu.
Welcome to QuarkXPress

There are several improvements to form controls in QuarkXPress 6:

✦ You can quickly create form boxes by changing the content of an existing box to Form.
✦ You can place a form on a layer.
✦ You can create form boxes in table cells.

You can change the name of a browser in the Preferences dialog box.

You can specify additional export folders for pictures and rasterized text boxes in Web layouts.

Avenue.Quark and XML import

Both the Avenue.Quark interactive-document and XML-import features have been updated to include more comprehensive placeholder features and a more intuitive interface.

A refresher on version 5 changes

If you’re jumping from QuarkXPress version 4 to 6 — many QuarkXPress users did not adopt version 5, for a variety of reasons, including lack of native Mac OS X support — here’s what you missed.

In version 5, power users noticed a few changes to the overall application: Required Components, a new Preferences dialog box, and a streamlined Tool palette. The biggest functional change in version 5 was the capability to create tables.

Version 5 of QuarkXPress included one significant change to the application itself — the addition of Required Components. These small software modules add features such as tables, HTML export, and GIF import to QuarkXPress. Unlike XTensions (optional add-ons for QuarkXPress), Required Components must be present for QuarkXPress to run. Many of Quark’s old XTensions, such as Cool Blends, now exist as Required Components. The idea is that Quark can update and distribute these small modules without updating the entire program. Plus, Quark no longer has to test the software in all the different configurations with and without XTensions. Required Components are stored in a folder called Required Components inside your QuarkXPress folder, which is where you should leave them.

One other across-the-board change was the Preferences dialog box. QuarkXPress used to have two preferences dialog boxes — Application and Document — along with assorted preferences for the various XTensions you were using. Now, the application has one big preferences dialog box for Application Preferences, Print Layout Preferences, and Web Layout Preferences. Plus, you still get assorted preferences dialog boxes for XTensions. Even though the preferences are all in one dialog box, accessed through QuarkXPress: Preferences or Option+Shift+Y on the Mac, and through Edit: Preferences or Ctrl+Alt+Shift+Y in Windows), they still work the same:
QuarkXPress is the most popular publishing application in the world — with good reason. With its paste-up method of working and its flexibility, QuarkXPress is ideal for projects that run the gamut from black-and-white garage sale fliers to newspapers to glossy coffee-table books.
To understand QuarkXPress, you need to understand the concepts of items (boxes and lines) and contents (text and pictures). With version 6, you also need to understand the concept of projects and layouts if you want to go beyond the single-document-at-a-time view of publishing. To work, you’ll need to know how to work with these different elements, and to communicate you’ll need to know what to call them. If you’re already familiar with QuarkXPress, you’ll appreciate the new features for projects and layouts, undo, and synchronized text, as well as the enhancements for tables, Web pages, PDF output, printing, and layers — plus, of course, its newfound Mac OS X nativeness.