

ABOUT THIS MANUAL

This Manual consists of three parts. Part one describes the way Headers & Footers works and defines common terms used in the rest of the manual.

Part two describes all the options of the XTension and explains some of their features in detail.

In part three (appendix) you will find a description of the syntax and the structure of the commands used by this XTension.

INSTALLATION

If you haven't installed the XTension yet, please insert the attached floppy into your Macintosh, and double-click to open. You should now see the following window.



Now open your existing QuarkXPress⁶ folder and copy the new XTension as well as the exceptions file HeadLineCodes into this folder. Note: all XTensions should be on the same level as XPress itself.

That's it. Next time you start XPress the new XTension will automatically be loaded as well.

WHAT IS AN XTENSION?

The developer of QuarkXPress introduced the concept of letting third-party developed modules directly interface the main XPress program. Those modules are activated by the main program and exchange data via a defined interface. Once called, the modules have access to the original data and can therefore perform extremely powerful tasks.

Earlier versions of XPress only allowed for limited access to the main data, but since Version 3.1, XTensions can now perform more complex tasks, via the mechanism of Hidden Tags or Text. Hidden Tags are used to hide markers or even complete text strings inside the main text stream without affecting the justification and the display of the main data, and Headers & Footers makes excellent use of this feature.

INTRODUCTION

Normal headers/footers as well as running headers/footers are well known to producers of books, catalogues, documents or indexes. This type of production has not been the main strength of XPress and since it was designed to be a very visually orientated layout package, it did not originally fully support any of the special features required for the above mentioned types of production.

But now XPress can handle large amounts of data successfully and there are XTensions/Applications available like Autopage, which perform book production very efficiently. This is the area where Headers & Footers shows its usefulness. Currently headers/footers have to be typed manually or copied via the clipboard. Now the user can forget about them - the Headers & Footers XTension does it all automatically. As a matter of fact, it does far more than just moving header/footer text into the header/footer area.

Headers & Footers copies up to nine levels of marked text from the body text into the header/footer area. While copying, it can format the text intelligently (e.g. truncate it or convert it into caps) and since the process of header/footer generation is repeatable there are no production bottlenecks associated with corrections. You simply do your corrections in the body text and before outputting to your Printer, generate all headers/footers again via an option of your XTension menu.

WHAT IS A RUNNING HEADER/FOOTER?

To describe Headers & Footers we will have to clarify what a running header/footer actually is.

By a running header/footer we mean text that will be copied from the

body text into a defined area named header/footer area simply to make it easier for the reader to find an area in his documentation.

In practice it cannot be guaranteed that the text you see in the body text will appear in the same form in the header/footer text (think of plural words or logical group definitions) so the program has to provide a mechanism to handle these special cases. Speaking in simple terms, a header/footer can either be a visible text string that appears in the header/footer area exactly as it appears in the body text, or it is an invisible text string that is only shuffled around inside the body text.

Furthermore a header/footer can consist of multiple levels of text which will be updated at different times. Think of a simple dictionary, say French to English. You will find at least three different levels there: Level one is the text string English-French which will be changed in the middle of the book into French-English. Level two is the actual alpha character A-Z and the last level is the actual keyword at the beginning or the end of a text column.

HOW DOES HEADERS & FOOTERS DO IT?

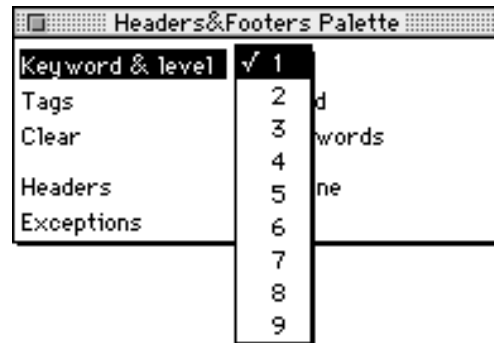
Producing running headers/footers using Headers & Footers is a three-step process:

1. Marking and Tagging the Text within the Body Text
2. The Definition of the Header/Footer Output Format
3. The Generation of the Running Headers/Footers

MARKING AND TAGGING THE HEADER/FOOTER TEXT

Visible header/footer text can be marked in two different ways: either while originating the text or in QuarkXPress on the screen via the Headers & Footers-Palette and the mouse.

If you want to mark your text with the mouse possibly the most time consuming method of the two you simply highlight the text and select a level from the Headers & Footers-Palette (see the following picture).



A short flashing of the marked text will indicate that the function has been performed (you can show the markers again anytime you like).

If the text is to be marked during origination you must use the correct command syntax as there is Sn at the start of Headers/Footers text and En at the end of text. The character n represents a digit for the Header/Footer Level from 1 to 9. These commands must be delimited by one of the following character pairs {...}, [...], and (...). A complete definition of a header/footer text of level 1 is shown in the following line:

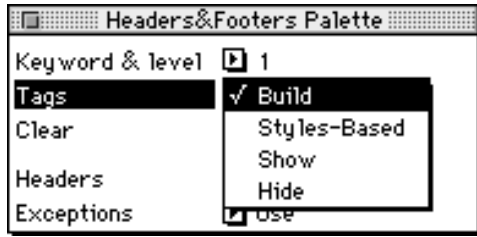
```
{(S1)} Header/Footer Text {(E1)}
```

For invisible header/footer text (text which will not appear in the body text but will keep its relative position and be extracted) either key the necessary commands during origination or key them into the XPress Document after having loaded the text into it. The syntax is very similar but this time all the text is embedded with the start command:

```
{(S1Header/Footer Text)}
```

As long as you see this command, including the header/footer text, it occupies space in a line of text and influences the justification. Therefore the visible markers now must be converted into invisible markers using the option Tags Build from the Palette (see following picture).

Headers & Footers Demo Documentation



DEFINITION OF THE HEADER/FOOTER OUTPUT FORMAT

Now we define the format and styles of the actual header/footer itself. By activating the option Headers Define we get a new window in which we can specify the format and the levels of headers/footers we want to output (For more details see also the next chapter of this manual). As a result of our definition we will see a readable command in the header/footer text box. The command is only a visual representation of your definition, but as long as it is present you can even correct it, obeying the syntax described in the appendix. Once a header/footer has been generated, the commands will be replaced by the actual headers/footers text. The XTension will still know what was defined, because at the time of generation, Headers & Footers automatically converts the commands into invisible tags. To delete those tags completely it is best to remove the entire text field. A typical example of a command is:

[H1FU]

This means: Output first header/footer text of level 1 from the body text of this page and convert all lower case characters into upper case (For more details see the appendix of this manual). Of course you can mix normal header/footer text and running headers/footers and because of the hidden tags the XTension will know which text to update. The final header/footer text will be in exactly the same style as the definition command placeholder, so if you want to change font, point, size or color for the header/footer text, here is the place to do it. Simply by using the text handling features of QuarkXPress you can now alter them either on the master pages or on an individual page. Next time you update the headers/footers these definitions will be recognized.

THE GENERATION OF THE RUNNING HEADERS/FOOTERS

Once your definition of the header/footer text fields is done and your pages are completely built you can now generate the running headers/footers. After activating a text box of your body text, simply select the option Headers Make and the XTension will now extract all necessary text strings from your body text and move them into the header/footer text fields. Depending on the size of the document, this can take some time (approximately 2 pages per second).

THE XTENSION HEADERS & FOOTERS

If you have installed your QuarkXPress-XTension correctly you should now see under the Utilities menu a new entry Headers & Footers. If you select this entry, a pop-up submenu will appear.



ABOUT HEADERS & FOOTERS

In this About window you can find further details of this XTension.

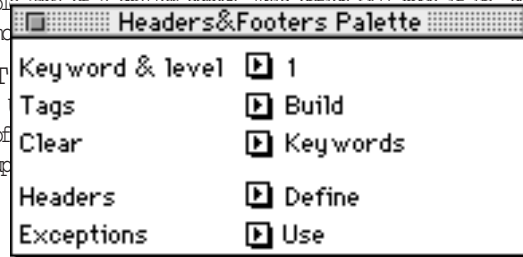


SHOW/HIDE PALETTE

With this option you show or hide the Headers & Footers Palette.

RELOCATE

Clicking on this option will move your Palette to a position near the top left corner of your screen. This is particularly useful if your document has been used on a large screen and therefore your palette is out of the visible range of a smaller screen. This option will also move it to be

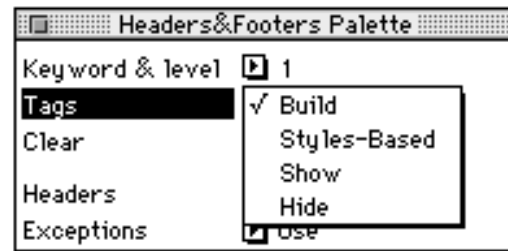


KEYWORD & LEVEL

Use this option to mark header/footer text that has been highlighted with the mouse. The numbers of the pop-up menu correspond with the levels of headers/footers text of the definition. If you want text of level 1, simply highlight the text and select 1.

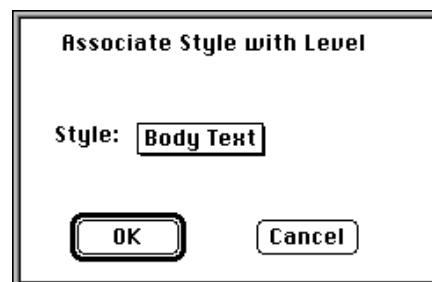
TAGS BUILD

Use this Option to convert visible markers into hidden Tags. Please make sure you have selected an appropriate body text box anywhere in your document before you use this option. A dialog window will show a selection of delimiters this XTension supports. Select one of them and select the OK button.



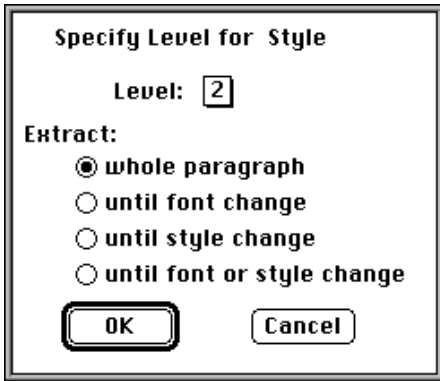
TAGS STYLE-BASED

A very simple method of marking header/footer text in Headers & Footers is to use style sheets. This option is tailored for simple structured production projects (indexes, telephone books, etc.). It is assumed that the start of a paragraph using a specific style sheet is also the start of header/footer text. The end of this text can be defined in a separate window (read on).



The actual window now shows all style sheets of this document and by clicking on one of them the user can now define what header/footer text level he wants to associate with this style sheet. After releasing the mouse button a new window appears and now the level must be defined. 0 will de-select this style sheet completely.

With this method the user can define more than one style sheet for the same level of header/footer text.



With the radio buttons the user defines how the XTension determines the end of the header/footer text. The XTension currently supports:

whole paragraph -defines the text until the next paragraph return to be considered header/footer text.

until font change -defines the text until the first font change in the paragraph (e.g. Times becomes B Times Bold).

until style change -means only text until the next change of style from the palette or XPress-Menu Style (Font) will be used as header/footers text. This does not include the styles inferior, superior and superscript.

until style or font change -combines the two possibilities described before.

TAGS SHOW

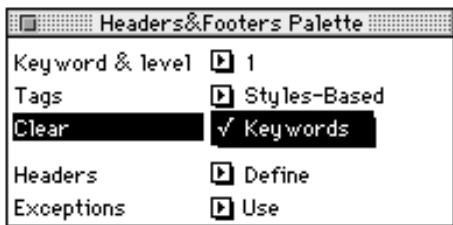
Hidden Tags usually cannot be seen but sometimes it is useful to visually check the definitions. With this option the user can show the Hidden Tags. On Black & White screens they appear in gray, on color screens in magenta. Note: headers/footers cannot be built as long as tags are visible!

TAGS HIDE

This option hides the tags again.

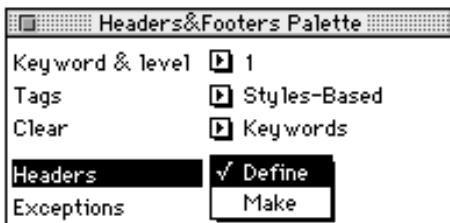
CLEAR KEYWORDS

This option clears the definitions of header/footer text. If an area of text is selected it will ask whether the tags of this selected area should be cleared, if not, it will clear ALL definitions of header/footer text.



HEADERS DEFINE

This Option opens a new window which is described in detail in a separate chapter of this manual (Define Header/Footer). You should only use this option when a header/footer text field has been selected.



HEADERS MAKE

This option does the actual job of generating the running headers/footers. It can be used anywhere inside the body text boxes, and can be repeated as many times as necessary.

EXCEPTIONS USE/IGNORE

QuarkXPress automatically fetches all XTensions at run time. On top of

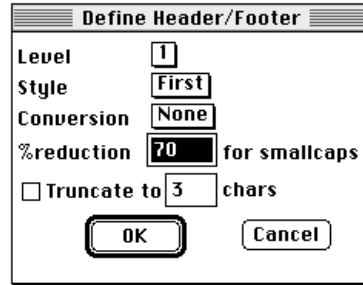
that the XTension Headers & Footers fetches an exception list with the name HeadLineCodes, which was on the release disk with this XTension. This file can be edited by the user and must be at the same level as the XTension itself.

For every Format type in the definition window, there is a variable list of exceptions. These will be recognized by the program and not be converted. The exact structure of this file will be found in the appendix.

If this file is missing QuarkXPress will warn you at run time. The consequences are that conversions (e.g. uppercase to lowercase, etc.) cannot be performed.

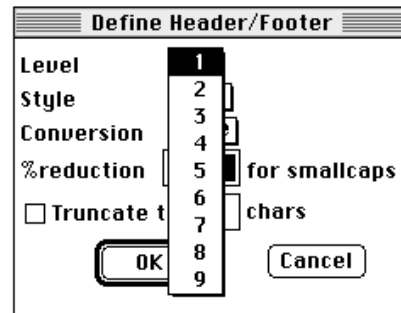
DEFINE HEADERS

Access this window via the option Headers Define from the Headers & Footers Palette. In here the user will now specify the format of the running header/footer text.



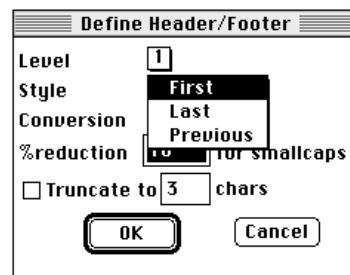
LEVEL:

This option defines the level of header/footers text and corresponds with the level of the actual marked body text.



STYLE:

This option defines the type of header/footer. The XTension Headers & Footers always saves the first, the last and what we name the previous entry of every level in a side buffer.



First -extracts the first text found of the defined level from this page. If none found, the last one saved from previous page is used.

Last -extracts the last header/footer text found of the defined level from this page. If none found, the last one saved is used.

Previous -if there is header/footer text of this level on the first line of this page, the XTension will use it; otherwise the last one saved will be used.

CONVERSION

Header/footer text can be converted before output into its defined field. In order to do so the XTension needs a file named HeadLineCodes on the same level as the application QuarkXPress (see also appendix A).

None -The text will not be converted.

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To uppercase -The defined text will be converted into upper case.

To lowercase -The defined text will be converted into lower case.

To smallcaps -The defined text will be converted into small caps. Headers & Footers converts every lower case character into an upper case using the file `HeadLineCodes`. It also reduces the point size of this character to the defined value (read on).

To l.c. - not first char -the text will be converted into lower case except for the first character of each word (Exceptions can be defined in the file `HeadLineCodes`).

% REDUCTION FOR SMALL CAPS

This value is used if lower case characters are converted into small caps. Numbers between 5-100% are valid; usually it is 70%.

TRUNCATE TO

If this checkbox is active all defined header/footer text strings will be truncated to the number of characters defined in the following number field. This option is very often used in telephone book or dictionary production.

APPENDIX THE FILE HEADLINECODES

If the QuarkXPress XTension has been installed correctly you should see two new files in your QuarkXPress Folder: the XTension Headers & Footers and the exception file `HeadLineCodes` (see following picture).



Headers&FootersXtn



HeadLineCodes

The file `HeadLineCodes` is used to control the optional conversion of header/footer text prior to auto-insertion in the header/footer boxes. If this file isn't available or if the syntax is incorrect a message will appear at the startup of QuarkXPress.

THE SYNTAX OF HEADLINECODES

The file will be checked syntactically at run time. The XTension looks for lines starting with a % followed by a two-digit number and a paragraph return. The rest of this line is treated as a comment field.

All lines prior to the first %-line will also be ignored and can therefore be used for your own comments (date, etc.).

The sequence of the %-lines MUST be in incrementing order (%01, %02 and so on)!

Each definition must be on one separate line, terminated by a RETURN.

Currently Headers & Footers supports the following definitions and exceptions:

%01=Convert lower into upper case
%02=Convert upper into lower case
%03=Exceptions during Conversion of lower into upper case
%04=Exceptions during Conversion of upper into lower case
%05=Exceptions during Conversion of lower into small caps
%06=Exceptions during Conversion of upper into lower case (not 1st char.)
%end=End of file

CONVERT LOWER INTO UPPER CASE

To convert all characters of an alphabet, a conversion table must be used, since flexibility is required for special codes like `SS`.

Correct syntax is: `SS`. The lower case (german sz) will be converted into the two characters `SS`. This can also be used to convert ligatures.

CONVERT UPPER INTO LOWER CASE

A separate table controls the conversion from Upper into lower case since the reversion of the previous table would cause errors (`SS` doesn't automatically have to be converted into `ss`).

EXCEPTIONS DURING CONVERSION OF ...

The following areas defined as %03 to %05 are used to define exceptions to the corresponding option and are of the same structure. If you choose to convert into upper case, the program will not convert the words defined in area (%03). This is used to keep words like `in`, `from`, `to` and so on in their original case. The same mechanism is used during conversions from uppercase to lowercase. If you want to maintain the logos of companies like IBM, ESS and so on, simply define them as exceptions for the option uppercase to lowercase.

A little bit more complex is the option l.c. - not 1st char. Headers & Footers uses here two exception lists in combination, namely %04 and %06. In list %04 the XTension finds the words which mustn't be converted at all, and if not defined there, it uses list %06 to check whether the word has to be converted into lower case completely.

The following text is used as an example:

ESS HARD AND SOFTWARE

Option 1-into lowercase ESS hard and software

Option 2-l.c. - not 1st char: ESS Hard and Software

Explanation: In Option 1, the list %04 will be used, the term ESS will be found and therefore not converted; the rest becomes lowercase.

In Option 2 the program finds via list %04, ESS again and doesn't convert it, but additionally it finds in list %06 the word and as a further exception and therefore it converts it completely into lowercase.

APPENDIX THE SYNTAX

... IN HEADERS DEFINE

If the user defines a header/footer, the XTension Headers & Footers produces a command of a defined syntax. Additionally - and this is something the user doesn't see - it generates two Hidden Tags! They will only be deleted if the COMPLETE command gets deleted! The commands can be edited and will be recognized if they follow the correct syntax logic. Commands that the XTension doesn't recognize will appear as ordinary text.

An advantage of this method is that the user can define on his master pages the style and the fonts of the header/footer text without having them available, since they are produced later. This is done simply, by giving the command for the style that the header/footer text should have. However, it is not possible to change fonts, styles, etc. within a command.

Every command starts and ends with a hidden tag. The parameters are embedded into a pair of brackets [...] which may not be changed. The number of parameters depends on the conversion options of the definition.

SYNTAX:

[(th TUA)]

Hn = Header/Footer Text Level (n = 1-9)

T = Output type

F = first

L = last

P = previous

U = Convert

U = upper

L = lower

Snn = small caps (nn = point size in %)

I = l.c. not 1st char.

Ann = truncate (nn = No. of characters)

EXAMPLES:

[(H1F)], [(H1LU)], [(H2PS70)], [(H1FS70T4)]

... IN THE MARKING OF HEADERS/FOOTERS TEXT

If you want to key markers for inline header/footer text you must use delimiters the XTension Headers & Footers can recognize and convert.

Every command starts and ends with a pair of delimiters of which the outside delimiter is definable ([, { or }). These delimiters are chosen to avoid conflicts with other XTensions or normal text streams.

SYNTAX OF VISIBLE HEADER/FOOTER TEXT:

{(Sn)} Header/Footer Text {(Tn)}

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n=The level (1-9)

Start and End number must be identical!

SYNTAX OF INVISIBLE HEADER/FOOTER TEXT:

{(SnHeader/Footer Text)}

n=The level (1-9)

All text following this number will be interpreted as header/footer text; don't key spaces to separate the number from the text!

EXAMPLE:

{(S1Appendix B)}{(S2)}The Syntax of Commands{(E2)}

Appendix B is an invisible header/footer; The Syntax of Commands a visible header/footer. After selecting the Tags Build option, Appendix B will no longer be visible, but will remain hidden in the text stream and may be used to define a header/footer.

Note: Boldface type is used only for the purpose of identifying syntax elements, and is not required.