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Getting Started

About Quark Author Web Edition
Quark Author Web Edition is a rich text editor that can be used to produce smart documents and content using a web browser. It is a structured content editor that allows subject matter experts to write content without worrying about the style. The author provides the content, instead of the layout, how section types are styled in a particular publication is left to dynamic publishing.

Smart documents
A Smart Document is very much like any document. It consists of sections, each with a heading and body content, such as paragraphs, lists, tables, videos and images. What differentiates a Smart Document from other documents are the structure and semantics applied to content. This metadata enables automated processing and dynamic publishing of content. Each section, for example, is of a particular type, which may be unique to a type of document, or common to multiple document types. Similarly, document sections may be authored for a single document, or shared across multiple documents.

Introduction to the Quark Author Web Edition User Guide
The User’s Guide contains information about Quark Author Web Edition intended for end-users. It describes all features and options available in the application and shows you how to use it to easily create and edit rich document content, as well as add media objects like videos and images.

Quark Author Web Edition configuration
Because Quark Author - Web Edition is configurable and extensible, its features can be customized by a developer or a system administrator. Because of this not all of the functions described in this User’s Guide may be available in your Quark Author - Web Edition instance and your configuration may have specialized functions not described in this guide.

Also note that the Quark Author - Web Edition interface can be customized and displayed with a different skin (colors, icons, or size).
The user interface

Quark Author - Web Edition provides a clean and simple user interface. If you are familiar with desktop word processors you will find that many commands are familiar or self-explanatory.

The figure below shows the main interface of Quark Author - Web Edition:

Quark Author - Web Edition interface.

Quark Author - Web Edition consists of the following main parts:

- The banner at the top of the window provides file-level operations, such as Save and Close. The pane settings button on the far right allows the user to show and hide various task panes.
- The "Smart Document pane." - the section to the left of the Editing pane containing the tree structure of the document currently being worked on. Use this pane to add and nest sections of the document and to navigate among them.
- The "Editing pane." - the space below the Toolbar where you edit all document content.
- The "Toolbar." - the section at the top of the Editing pane containing buttons that give you access to various functions of Quark Author - Web Edition.
- The "Preview pane." - the section to the right of the Editing pane where you can see a live preview of the current document, in various output formats.
- The "Review pane." - the section to the right of the Editing pane where you can see user comments and tracked changes on the document you are working on.
THE USER INTERFACE

- "Context menus." - a shortcut or drop-down menu that displays the commands available for the element that was right-clicked.
- Various dialog boxes - small pop-up windows that appear when you use some of the editor's functions and are opened by clicking the toolbar buttons.

**Smart Document pane**

The **Smart Document** pane is located to the left of the editing pane and presents an outline of the document. The **Smart Document** pane provides the ability to navigate, insert, delete and move document components.

![Smart Document Pane](image)

The **Smart Document** pane.

The Smart Document pane includes the following:

- The user can select to show or hide the **Add Section** option in the **Smart Document** pane. By default the **Add Section** option will be shown for new documents, and hidden for checked out documents.
• The **Options** button displays a drop-down menu of options available for the currently selected section of the document. This menu is also presented when you right-click a section in the tree.

• Under the toolbar, the first column identifies shared components within the document. An icon in this column identifies the root section of a component, and a checkmark indicates the component is checked out for edit. All sections in the component are shaded a different color in the section hierarchy.

• The second column presents an outline of the sections in the current document. It allows the user to add and delete sections as needed. Additionally, sections can be reordered by dragging and dropping sections within the tree.

**Editing pane**

The **Editing** pane is located below the toolbar.
The **Editing** pane.

Use the **Editing** pane to enter the title and contents of each section of your document.

**Context menus**

**Context** menus are pop-up menus that appear whenever you right-click inside the **Editing** pane. It serves as a shortcut for most common operations available for a given type of object.

The menu is context-sensitive which means that the options displayed in it depend on the object that you click. If, for example, you right-click while inside a table, you will see table-specific options available in its context menu.

![A table context menu.](image)

For more complex objects, like tables, the context menu might include sub-menus with further options.
Preview pane

The Preview pane is located at the right of the Editing pane and allows you to preview the current document in multiple output channels like PDF, IMAGE and HTML. This is where you preview what the final document will look like.

The Preview pane.

The Preview pane toolbar includes the following controls:

- Click the button on the Preview pane to open or save a copy of the document.

- Click the button on the Preview pane to refresh the preview document with the latest content in the Editing pane.

- The drop-down menu allows you to select a format for the preview.
Review pane

The Review pane is located at the right of the Editing pane and allows you to see a list of all comments and tracked changes that have been added to the current document.

The Review pane.

The Review pane toolbar includes the following controls:

• Click the Refresh toolbar button to refresh the list to include any recently added comments or tracked changes.

• Click the User toolbar button to show filtered list of comments or tracked changes added by specific users.

• Click the Date toolbar button to sort the comments or tracked changes by Date.

Footnotes pane

The Footnotes pane is located at the right of the Editing pane and displays all of the footnotes and endnotes contained in the document.
The Footnotes pane.

The Footnotes pane toolbar includes the following controls:

- Choose Footnote or Endnote from the drop-down menu to see a list of either footnotes or endnotes in the document.

- Click the Refresh toolbar button to refresh the list to include any recently added footnotes or endnotes.

- Select an endnote or footnote from the list and click the Edit toolbar button to edit the selected footnote or endnote.

- Select an endnote or footnote from the list and click the Delete toolbar button to delete the selected footnote or endnote.

If you click on a footnote or endnote from the list, the footnote or endnote location in the document will be highlighted.

If you insert a footnote or endnote when tracking is on, then the footnote/endnote in the list has additional options.

You can use these options to Accept or Reject the inserted footnote/endnote.
The Refers To and Where Used panes

The Refers To and Where Used panes allow you to view the relationships (including primary and secondary references, if any) for the selected asset. The current document Refers To assets (images and components). These are primary, or first-level references. These referred to assets may Refer To other assets. These are secondary, or second-level references.

Refers To pane

The Refers To pane is located at the right of the Editing pane and displays all assets that the selected asset refers to.

<table>
<thead>
<tr>
<th>PREVIEW</th>
<th>REVIEW</th>
<th>FOOT NOTES</th>
<th>REFERS TO</th>
<th>WHERE USED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Refers To pane.

The Refers To pane includes the following columns:

- The Pinned Version column is used to indicate if a referenced asset is pinned to a specific version of that asset. The tooltip will show the version that the reference is pinned to.
- The Checked Out column is used to indicate if the referenced asset is currently checked out.
- The Name column gives the name of the referenced asset.
• When you double-click an asset in this pane, an XPath is displayed below the asset name. The **Value** column contains the XPath location within the current document where the asset is referenced.

**Where Used pane**

The **Where Used** pane is located at the right of the Editing pane and allows you to see all documents and components that reference the current component.

This pane is only applicable when opening a content type that can be included within another content type. With our default configuration, when opening a Smart Section, the **Where Used** pane lists all Smart Documents that include the section.

The **Where Used** pane includes the following columns:

- ✓ - The **Checked Out** column is used to indicate if the parent asset is currently checked out.
- The **Name** column gives the name of the parent asset.
- The **Value** column contains the XPath location within the parent document where the current component is referenced.
Toolbar

The Toolbar is the section located at the top of the Editing pane. It contains menu buttons that give you access to various functions of Quark Author - Web Edition. Buttons include both simple operations (basic "Text emphasis.") and more advanced features for providing structure.

To see the name of the function associated with a toolbar button, hover the cursor over that button.

The Toolbar includes the following controls:

- Use the Para Types toolbar button to select from the drop down menu to apply a paragraph style to the selected text.
- Use the Tag Types toolbar button to select from the drop down menu to apply a character style to the selected text.

- Use to apply **bold**, *italic*, _underline_ and strike-through emphasis to the selected text.
- Use to apply superscript and subscript emphasis to the selected text.
- Use to apply list options (bulleted list, numbered list, increase indent, decrease indent) to the selected text.
- Use the Insert Figure toolbar button to insert a figure into the document. See "Inserting a figure".
- Use the Insert Image toolbar button to insert an image into the document. See "Inserting an image".
- Use the Insert Video toolbar button to insert a video into the document. See "Inserting videos".
- Use the Insert Table toolbar button to insert a table with the defined number of columns and rows into the document. See "Inserting tables".
- Use the Insert Table from Server toolbar button to insert a smart table into the document. See "Inserting tables from server".
- Use the Insert Microsoft Excel Components toolbar button to insert components from an Excel spreadsheet. The drop-down menu allows you to choose to insert a Table or a Chart.
- Use the Insert Special Character toolbar button to insert special characters or symbols into the document.
- Use the Link toolbar button to insert a hyperlink into the document.
• Use the Insert Cross Reference toolbar button to insert a cross reference, pointing to any other Section, Figure or Table inside the document.

• Use the Synchronize Cross Reference toolbar button to synchronize the cross references in the document.

The Insert Cross Reference and the Synchronize Cross Reference buttons are only available after you have saved a revision of the document.

• Use the XML toolbar button to view the document in XML format.

• Use the Refresh toolbar button to refresh the contents of referred components in the document.

• Use the Redo and Undo toolbar buttons to undo and redo the most recent action performed on the document.

• Use the Add Comment toolbar button to add a comment to the document.

• Use the Remove omment toolbar button to remove a comment from the document.

• Use the Tracking toolbar button to enable/disable tracked changes. If you enable/disable tracking in your document, the tracking state will be saved in the Tracking State attribute when you save the document.

• Use the Highlighting toolbar button to enable/disable highlighting of tracked changes. If you enable/disable highlighting in your document, the highlighting state will be saved in the Tracking State attribute when you save the document.

• Use the Accept toolbar button to accept all or just one of the changes in a file.

• Use the Reject toolbar button to reject all or just one of the changes in a file.

• Use the Next button to go to the next tracked change in the document.

• Use the Previous toolbar button to go to the previous tracked change in the document.

• Use the Find and Replace toolbar button to search for a word or phrase in the document and replace it.

• Use the Spell Check drop-down menu to select options for spell checking your document, including enabling and disabling the Spell Check As You Type feature.

• Use the Insert Footnote toolbar button to insert a footnote into the document.

• Use the Insert Endnote toolbar button to insert an endnote into the document.

There are many other toolbars that can be displayed, hidden or docked with the preview pane.
Working with documents

Creating documents

New documents are created in the Quark Publishing Platform Client workspace. To create a new document, click New and choose Smart Document from Server Template, Smart Section or Smart Document from the drop-down menu. Quark Author launches and the new document displays.

Editing documents

Existing documents are opened in the Quark Publishing Platform Client workspace. To open an existing document for editing, navigate to the repository folder containing the document to be edited. Right + click the document and choose Check Out. Quark Author launches and the selected document displays.

Inserting sections

Use the Smart Document pane to build the structure of the document by adding and nesting the document sections. Each document section consists of a Title and Contents. To add a section, click on + add Section, enter the title name and add your content.

Continue adding sections and subsections until you have built the document structure you desire.

If you attempt to add a Sub-Section before you have a Section, you will be able to have the editor automatically create the missing sections for you:
Entering text

Use the **Editing** pane to add content to the document. Each document section that you add to the document consists of a **Title** and **Contents**.

As you type, the text, all formatting applied using the toolbar buttons as well as all inserted media appear immediately in the **Editing** pane. If the document contents span beyond the limits of the editing area, a standard scrollbar will appear.

The edited text looks as similar as possible to the results end users will see after the document gets published. When you format your text using the editor features, the formatting can be immediately seen in the **Editing** pane.

![A User Guide](image-url)

This is some text that has been bolded, and some that has italics applied.

Track changes

The Track Changes feature provides support for collaboration. Reviewers and other colleagues may directly provide corrections, comments, and additions. During the review process, each user's changes are visually tracked and may be accepted or rejected.

To enable the Track Changes feature in your document, click the **Tracking** toolbar button. Use the **Highlighting** toolbar button to enable/disable highlighting of tracked changes.

If you enable/disable highlighting and tracking in your document, the highlighting and tracking states will be saved in the **Tracking State** attribute when you save the document.

You can see a list off all tracked changes in the **Review** pane.

Comments and tracked text preview

Use the **Review** pane to see a list of all comments and tracked text that have been added to the current document.

![Capital Markets Research Review](image-url)

The fund raising environment in Asia Pacific remained positive in 2014 and the period saw improved activity. We look at how this is having a positive impact on the direct real estate investment market over the course of this year.

Comments added/updated or tracked changes in the **Editing** pane should be immediately reflected in the **Review** pane. If another user has a document checked...
out for commenting or review and you have the same document open as read-only, you can click the button on the Review pane to refresh the comment list with any comments that may have been added or updated or to refresh the tracked insertions or deletions in the document.

Click the button on the Review pane to sort the comments or tracked changes by Date in ascending or descending order.

Click the button on the Review pane to show a filtered list of comments or tracked changes added by specific users.

**Document specific tracking state**

Tracking and highlighting are enabled based on a document's last saved tracking state. The value of the tracking state will be displayed when you check in a document:

The Check In dialog.
States for tracking will be saved as one of the following values of the Tracking State attribute.

- Disabled
- Highlighting Only
- Tracking And Highlighting
- Tracking Only

**Navigating in the document**

To easily move around the text you can use the keyboard.

*Page Up* and *Page Down* scroll the Editing Pane one page up or down in the document, no matter how many sections are in the document. The *Home* and *End* keys can be used to go to the beginning and end of line, respectively, or combined with the *Ctrl* key - to the beginning and end of the document. You can also move inside the text using the *Arrow* keys.

**Document preview**

Use the *Preview* pane to preview the document. You can choose to preview the document in multiple formats like PDF, IMAGE or HTML.

Click the ➡️ button on the *Preview* pane to open or save a copy of the document.

Click the ⏯️ button on the *Preview* pane to refresh the preview document with the latest content in the *Editing* pane.

**Undo and redo**

The *Undo* and *Redo* functions of the editor make text editing easier by remembering the actions performed in the editor window and making it possible to revert them as needed.

The *Undo* feature is a quick way to cancel the recently introduced change and restore the document to its previous state. To undo the last action you can either use the 🔄 *Undo* toolbar button or the *Ctrl+Z* shortcut on your keyboard.

Quark Author - Web Edition supports many undo levels, you can usually go back as many steps as required.

The *Redo* feature lets you revert the last undo operation. This means that the document returns to the state it was in before you performed the undo. To redo the last action you can either use the ✨ *Redo* toolbar button or the *Ctrl+Y* shortcut on your keyboard.

Just like with undo, many redo levels are supported, so you can usually go forward as many steps as required.
Cut, copy and paste

Among the most common editing operations are cutting, copying, and pasting text. Quark Author - Web Edition supports these operations and also allows you to paste a Microsoft Word formatted fragment.

To copy a text fragment, select the text and then copy it using the Ctrl+C shortcut on your keyboard. The formatting of the original text will be preserved.

To paste a text fragment, start with cutting it or copying from another source. When the text is in the clipboard, you can paste it using the Ctrl+V shortcut on your keyboard.

The Web Editor also allows you to preserve basic formatting when you paste a text fragment from Microsoft Word. To achieve this, copy the text in a Word document and paste it using the Ctrl+V shortcut on your keyboard.

Find and replace

The Find and Replace features allow you to quickly search the text looking for specific words or phrases and replace them. This allows you to change multiple occurrences of a phrase at once instead of manually finding and modifying each one of them.

The Find and Replace features are implemented using one dialog box with two tabs that let you switch between the Find and Replace features. Clicking on either the Find or Replace icon on the toolbar will bring up this dialog box.

![Find and Replace dialog](image)

The Find and Replace dialog.

The Find tab consists of a search field and a few options that let you refine the search:

- **Match case** - Check this option for a case-sensitive search.
- **Match whole word** - Check this option to limit the search operation to whole words.
- **Match cyclic** - Check this option to continue the search from the beginning after the editor reaches the end of the document. This option is checked by default.
The **Replace** tab includes the following extra fields:

- **Replace with** - Enter the word or phrase that will replace the search term in the document.

After you enter the search term as well as the replace term and select the options, press the **Replace** button. If you want to replace all occurrences of the search term in the document, press the **Replace All** button.

The system notifies you of how many replacements were made:

![XML preview example](image)

**XML preview**

If at any time you would like to check the XML view of your document, use the XML toolbar button to view the document in XML format. A read-only view of the text will appear containing all the relevant XML tags and attributes:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<?xml-stylesheet type="text/css" href="/quarkauthor/style.css"?>
<!DOCTYPE Quark Author Web Edition 11.0 User Guide>
<document id="_72ec625-880a-80b4-bb56-af9260e8f6c6">
  <document>
    <body>
      <p>Getting Started</p>
      <section id="_17952b0a-029a-4bce-a579-55da5db0942">
        <section id="_17952b0a-029a-4bce-a579-55da5db0942">
          <p>Sub-Section 1</p>
          <section id="_17952b0a-029a-4bce-a579-55da5db0942">
            <p>Sub-Section 2</p>
          </section>
        </section>
      </section>
    </body>
  </document>
</document>
```

An XML preview example.

**Saving and closing documents**

Use the **Save Revision** button located at the header to save a revision of the document. The document will remain open for further editing.

Use the **Save and Close** button located at the header to check in the document.
Use the Close button located at the header to close the document. A draft version of the document will be saved.

For both the Save Revision and the Save and Close options, the Check In dialog box displays:

1. Choose a target collection from the collection list.
2. Enter a file name for the document in the File Name field.
3. To specify whether the asset is saved with a major or minor version number, click Major Version (1.0) or Minor Version (0.1). Access to the Minor Version (0.1) option is controlled by privileges.

4. Choose a content type from the Content Type drop-down menu.
5. Choose a workflow from the Workflow drop-down menu.
6. To indicate the asset's current status, choose an option from the Status drop-down menu.
7. To send the asset to a particular user or group, choose an option from the Routed to drop-down menu. (Note that if your workflow relies on automatic status-based routing, the Routed to drop-down menu value might change automatically when you choose an option from the Status drop-down menu.)
If you do not choose any name from the **Routed to** drop-down menu when you check in an asset for the first time, the asset is routed to the active user.

8 Use the **Revision Comment** field to enter a revision comment for the version of the asset you are checking in. The revision comment will be stored with the asset. The revision comment also displays when you view revisions of the asset.

9 Change values for any attribute existing on the server, which is valid for this document and shown in the **Check In** dialog.

10 Click **Save**.

**Autosave**

Quark Author Web Edition’s Autosave feature periodically saves changes during an active editing session. By default, changes to content or structure are saved every 30 seconds. The Editor's status bar will show the **Saving** and **Saved** states to alert you when the content is autosaved. The next time you open the document, Quark Author Web Edition automatically loads the last available autosaved version of the document.

Autosaved updates to the document are stored on the Platform Server but do not result in a new version of the document asset. Since the updated document is available on the server, a subsequent session to edit the document even from a different location or browser will automatically load the last (auto)saved content.

Autosave is also triggered when a user clicks the **Close** button in the header toolbar. Autosave is enabled only for documents which have been saved at least once to Platform. To avoid the risk of losing work, save the document to create an initial revision and trigger the autosave feature.

The document is saved on the Platform Server and an active connection is required to save the document. Autosave is disabled when Quark Author Web Edition detects a temporary loss of connectivity with Platform Server. As soon as the connection is restored, periodic autosave attempts are re-initiated.

Along with the primary document, changes to components which are checked out inline within the primary document are also saved as part of autosave. For example, a Smart Section or Smart Table contained within a checked out document may also be checked out by the same user (assuming the user has permissions). Changes to the parent document as well as the inline components are all autosaved according to the predefined interval.

**Configurable interval**

By default, a work-in-progress is saved every 30 seconds. The interval may be configured using the "Workspace-config.xml" file. See *Quark Author Web Edition System Administration Guide* for details.

**Platform Server draft version**

Quark Author Web Edition stores autosaved content as a draft version of the asset corresponding to the checked out document. The draft only exists on Platform server. Draft versions are exclusive to the user who has the asset checked out. Each draft is not accessible to other users nor are they used by Platform’s publishing service to...
WORKING WITH DOCUMENTS

generate output. Autosave by Quark Author periodically updates the draft version of the document.

When updated content is saved as a new revision of document, any draft version is discarded. Draft versions of documents and hence autosaved contents are also discarded if the user aborts check out of the document or if the document's check out is overridden by another user (assuming that user has sufficient privileges).

Overriding the check out of a document checked out by another user may cause loss of autosaved content when the draft version is discarded.

Inserting Microsoft Excel components

The Web Editor allows you to insert Excel Tables and Charts into your document. To achieve this, click the Insert Microsoft Excel Components toolbar button and choose Insert Table or Insert Chart from the drop-down menu.

The Select dialog box opens.

Browse to the desired Excel content and select it.

The Select dialog.
Content editing

Text emphasis

Text emphasis determines the way your text will look in the published document. The text styling features are grouped together on the toolbar.

![Text emphasis buttons](image)

The bold, italics, underline and strike-through styles can be applied to the whole document, a paragraph, a word or phrase, or a single letter. The underline style will also be applied to all white space of the selected fragment. The strike-through style will also be applied to all white space of the selected fragment.

Applying text emphasis

Formats and styles are pre-defined combinations of various formatting options that make it easier to keep the presentation of the text uniform.

To choose a paragraph style, select a text fragment and click the Para Types button. The drop-down list contains several pre-defined paragraph styles that you can apply to the selected text:

![Paragraph styles](image)

To choose a character style, select a text fragment and click the Tag Types button. The drop-down list contains several pre-defined character styles that you can apply to the selected text. To make the choice easier, the style names are displayed in the style that they represent, giving you a preview of what the text will look like:
A style can be applied to the whole document, a paragraph, a word or phrase, or a single letter.

**Removing text emphasis**

In order to remove a style applied with the *Para Type* or *Tag Types* feature, open the drop-down list and click the formatting style name again.

**Rich text**

**Lists**

Lists provide a way to structure text in a clear manner as well as group items that belong together. Quark Author - Web Edition lets you create two types of lists:

- Bulleted (unordered)
- Numbered (ordered)

**Bulleted lists**

Bulleted lists are useful when you want to group a number of items that do not need to appear in any particular order.

**Inserting a bulleted list**

To create a bulleted list, click the *Insert/Remove Bulleted List* button on the toolbar. A default list marker will appear at the beginning of the line of text that contains the cursor and the line will become indented. If you want to add further list items, press *Enter* on your keyboard. The cursor will move to the next line with a list marker placed at its beginning.

The list is continued automatically as long as you press *Enter* at the end of a line. If you want to suppress list creation, press *Enter* in an empty line with a list marker or click the *Insert/Remove Bulleted List* button again. The cursor will then move to the next, unindented paragraph.
Converting existing text to a bulleted list
To turn existing text into a bulleted list, select one or more paragraphs and click the Insert/Remove Bulleted List button on the toolbar. Each paragraph will then become a separate list item.

Converting a bulleted list to text
If you want to remove list formatting, leaving the text of the list items intact, select the list in the document and click the Insert/Remove Bulleted List button on the toolbar. The list markers and indentation will be removed and each of the former list items will become a paragraph.

Numbered lists
Numbered lists are useful when you want to group a number of items that need to appear in a particular order. They are perfectly suited for lists of procedures or step-by-step instructions.

Inserting a numbered list
To create a numbered list, click the Insert/Remove Numbered List button on the toolbar. A default numbered list marker will appear at the beginning of the line of text that contains the cursor and the line will become indented. If you want to add further list items, press Enter on your keyboard. The cursor will move to the next line with a list marker placed at its beginning.

The list is continued automatically as long as you press Enter at the end of a line. If you want to suppress list creation, press Enter in an empty line with a list marker or click the Insert/Remove Numbered List button again. The cursor will then move to the next, unindented paragraph.

Converting existing text to a numbered list
To turn existing text into a numbered list, select one or more paragraphs and click the Insert/Remove Numbered List button on the toolbar. Each paragraph will then become a separate list item.

Converting a numbered list to text
If you want to remove list formatting, leaving the text of the list items intact, select the list in the document and click the Insert/Remove Numbered List button on the toolbar. The list markers and indentation will be removed and each of the former list items will become a paragraph.

Nesting lists
Sometimes one list level is not enough to represent a more complicated structure of items. Quark Author - Web Edition lets you add multiple levels of nesting to your bulleted and numbered lists.

You can also combine bulleted and numbered lists of various indentation levels.
**Increasing indent**

To create a nested bulleted or numbered list, use the **Increase Indent** feature. Place the cursor in the line that should start the nested list and click the **Increase Indent** button on the toolbar. The list item will become indented and the list marker will change. The next item added to the list will have the same indentation as the previous one and thus become a part of the nested list.

**Decreasing indent**

If you want to end the nested list and return to the previous indentation level, use the **Decrease Indent** feature. Place the cursor in the line that should be a continuation of the previous list and click the **Decrease Indent** button on the toolbar. The indentation of the list item will decrease and the list marker will change back to the marker for a list of a higher level.

**Inserting Hyperlinks**

The **Link** feature lets you add clickable hyperlinks to your documents.

To insert a link in your document, click the **Link** toolbar button on the toolbar or use the **Ctrl+L** keyboard shortcut. If you want the link to be assigned to a word or phrase, select it first. If no text is selected, the link URL will appear in the document as-is.

The **Link** dialog box that opens lets you choose the link type and configuration options pertaining to your choice.

![The Link dialog box.](image)

- **Protocol** - the communication protocol used with the web address. You can choose between **http://** and **https://**

- **URL** - the web address of the resource that the link is pointing to. It may be located on the same server as the web site you are currently on or an external server. If you want to use an external address, you must use the full absolute path (for example http://example.com/about.html).

**Inserting footnotes and endnotes**

**Inserting a footnote**

To insert a footnote in your document, simply click the **Insert Footnote** toolbar button.
This button will display the Insert Footnote dialog.

![Insert Footnote dialog]

Type in the text of your footnote and click OK. The footnote will be placed at the curser location. Footnotes are shown at the end of the page in Previews.

**Inserting an endnote**

To insert an endnote in your document, place your cursor in the text where you want the endnote and click the Insert Endnote toolbar button.

The Insert Endnote dialog displays.

![Insert Endnote dialog]

Type in the text of your endnote and click OK. The Endnote gets added at the cursor location. The Endnotes are shown at the end of the document in Previews.

**Cross references**

The Cross Reference feature lets you add cross references to your documents, pointing to any other Section, Figure or Table in the document.

**Inserting a cross reference**

There are two types of cross references:
• Synchronized Cross Reference - the link text is derived from the referenced content and will be refreshed automatically from the referenced content if the referenced content is updated.

• Unsynchronized Cross Reference - the link text is user provided and is not updated based on changes to the referenced content. An unsynchronized reference can be changed into a synchronized one using Synchronize Cross Reference toolbar command.

To insert a synchronized cross reference in your document:

1 Place the cursor where you want the cross reference and then click the Insert Cross Reference button on the toolbar. The Insert Cross Reference dialog box that opens lets you choose the reference type (section, table or figure).

![Insert Cross Reference dialog box.

2 Choose the type of cross reference you are inserting from the drop-down menu: Section, Table, or Figure.

3 Once you have chosen a cross reference type, the available references to link to will be listed. Choose a reference to link to and click OK. The cross reference will be inserted.

Any changes made at the cross-reference link will be reflected in the cross-reference text.

To insert an unsynchronized cross reference:

1 Select text in your document and then insert a cross reference, the cross reference and the link will not be synchronized.

Control+Click on any cross reference to jump to the cross reference link.
Synchronize cross references

An unsynchronized cross reference can be changed to a synchronized cross reference by using the Synchronize Cross Reference button on the toolbar.

You can choose to synchronize the selected cross reference or all cross references in the document.

Inserting figures and images

Inserting an image

To insert an image in your document, simply click the Insert Image toolbar button. This button will display the Select dialog.

The Select dialog.

Browse to the desired image and select it.

Inserting a figure

To insert a figure in your document, simply click the Insert Figure toolbar button. This button will display the Figure dialog.
The **Figure** dialog.

Enter the **Asset Name**, **Title** and **Description** of the desired figure and click **OK**.

**Resizing images**

After you have placed an image in the document, you can resize the image by clicking on the image's bounding box and dragging it to the desired size.

**Replacing an image**

After you have placed an image in the document, double clicking that image displays the **Select** dialog, allowing you to select another image to replace it.

**Inserting special characters**

To insert a special character into your document, click the **Insert Special Character** toolbar button. The **Select Special Character** dialog window that will open allows you to choose a symbol from a set containing Latin letters, numbers (including fractions), currency symbols, punctuation, arrows, and mathematical operators.
The Select Special Character dialog.

Select the character you need. The dialog window will close automatically and the special character will appear where the cursor is positioned in the text.

**Inserting tables**

To insert a table click the Insert Table button on the toolbar. This button displays the Insert Table dialog box:
The **Insert Table** dialog box.

Below is an overview of all **Insert Table** dialog elements:

- **Number of columns** - the number of columns in the table (mandatory).
- **Number of rows** - the number of rows in the table (mandatory).
- **Header Row** - check this box if you want your table to have headers.
- **Caption** - the label of the table that is displayed on top of it.
- **Description** - a description of your table.

**Inserting tables from server**

To insert a smart table click the **Insert Table from Server** button on the toolbar. This button displays the **Select** dialog box:
The **Select** dialog box.

Browse to the desired table and select it.

**Inserting videos**

To insert a video click the ➔ *Insert video* button on the toolbar. This button displays the **Insert Video** dialog box:

The **Insert Video** dialog box.

Choose **From Platform** or **From Web**.

Select **Browse** to browse to the location of the desired video.

Under **Select a poster image**, choose **Browse** to select an image to use for the video.
Click **OK** to insert the chosen video.

**Editing tables**

Once inserted into the document, the table can be modified. To edit the table, open the table context menu by right-clicking the table.

<table>
<thead>
<tr>
<th>Insert</th>
<th>Delete</th>
<th>Merge Cells</th>
<th>Insert Paragraph After</th>
</tr>
</thead>
</table>

The context menu for a table.

To insert additional rows and columns, or to add a caption or description, use the **Insert** option.

To delete the whole table and its contents, or individual rows or columns, use the **Delete** option.

To merge cells together, select the cells to be merged and use the **Merge Cells** option.

To insert a new paragraph after the table, use the **Insert Paragraph After** option. A new paragraph will be inserted directly following the table.

**Editing table rows and columns**

The table context menu lets you edit table rows and columns.

If you hover your mouse over the **Insert** menu option, further options become available.

<table>
<thead>
<tr>
<th>Insert</th>
<th>Delete</th>
<th>Merge Cells</th>
<th>Insert Paragraph After</th>
<th>Insert Column to the Left</th>
<th>Insert Column to the Right</th>
<th>Insert Row Above</th>
<th>Insert Row Below</th>
<th>Caption</th>
<th>Description</th>
</tr>
</thead>
</table>

Below is an overview of all **Insert** context menu option elements:

- **Insert Column to the Left** - inserts a new column to the left of the selected column.
- **Insert Column to the Right** - inserts a new column to the right of the selected column.
- **Insert Row Above** - inserts a new row before the selected row.
- **Insert Row Below** - inserts a new row after the selected row.
- **Caption** - allows you to add a caption to the table.
- **Description** - allows you to add a description to the table.
If you hover your mouse over the **Delete** menu option, further options become available.

Below is an overview of all **Delete** context menu option elements:

- **Delete Columns** - deletes the selected column.
- **Delete Rows** - deletes the selected row.
- **Delete Table** - Deletes the entire table and its contents.

**Spell checking**

Use the ☰️ **Spell Check** toolbar button to spell check the document and to enable and disable the **Spell Check As You Type** feature. Enabling the **Spell Check As You Type** feature allows you to display the **Spell Check As You Type** dialog box by clicking on **Options**, **Languages** or **Dictionaries** in the drop down menu.

![Spell Check As You Type dialog box](image)

The **Spell Check As You Type** dialog box.
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