

# 3

## TOOLS OF THE TRADE

**H**ave you noticed that we typically identify people's professions by the tools they use? I have only to mention some tool, and a

vocation comes to mind: A hammer and nails. A cold stethoscope. A blackboard and chalk. A printing press. We don't think of a hairdresser as standing around waving his arms but, rather, wielding a pair of scissors or a razor.

Every trade has a toolbox with which they must make a living, and you and I are no different. Our toolbox is our computer—or, more specifically, QuarkXPress—and the tools inside are the subject of this chapter. Like all tools, these take some time to learn, and it's not until you really start using them regularly that you begin to learn their secrets.

In the last chapter I primarily talked about QuarkXPress's general interface: this does this, that does that. Now my emphasis shifts toward the practical. Let's look at each tool on the Tool palette in turn.



### Items and Contents

If you only learn one thing from this chapter, it should be the difference between items and contents. This is a concept that some people find difficult

to understand, but it is really pretty simple. Moreover, the concept of items and contents is central to working efficiently in QuarkXPress.

Let's take it from the beginning. In order to put text on a page, you must place it in a text box. To put a graphic image on a page, you must place it in a picture box. Text boxes act as a sort of corral that holds all the words. There's almost no way a word can get outside the bounds of a text box. Picture boxes act as a sort of window through which you can see a picture. In both cases, the content of the box is different from the box itself.

Boxes are *items*. What goes inside them is *content*. Similarly, a line is an item, and the text you place on it is content. You can modify either one, but you need to use the correct tool at the correct time.

**Item tool.** The Item tool (or “Pointer tool”; though sometimes it's called by its technical name: “the pointy-thingy”; see Figure 3-1) is the first tool on the Tool palette. It's used for selecting and moving items (picture and text boxes, rules, and so on). You can use the Item tool by either choosing it from the Tool palette or by holding down the Command (Ctrl) key while any other tool is selected (though you can't select or work with multiple items with this Command key trick). I discuss all the things you can do with items later in this chapter, in “Manipulating Items.”

**Content tool.** The second tool on the Tool palette is the Content tool (sometimes called the “Hand tool”). This tool is used for adding, deleting, or modifying the contents of a text or picture box or a text path. Note that its palette icon consists of a text-insertion mark and a hand. When you have selected this tool from the Tool palette, XPress turns the cursor into one of these icons, depending on what sort of box you have highlighted (as we see in Chapter 9, *Pictures*, the hand is for moving images around in a picture box).

**Figure 3-1**  
The Item and  
Content tools





You can select more than one item at a time with either the Item or the Content tool. However, the Content tool acts just like the Item tool when you have two or more items selected (the cursor even changes to the Item tool cursor). There are two ways to select more than one item on your page: Shift-clicking and dragging a marquee.

**Shift-click.** You can select multiple items by Shift-clicking on them with either the Item or Content tool. If you have more than one item selected and you want to deselect one, you can Shift-click on it again (Shift-clicking acts as a toggle for selecting and deselecting).



**Tip: Grab Down Deep.** There are plenty of times I've found that I need to reach through one or more objects on my page and grab a box or line that's been covered up. Moving everything on top is a real hassle. Instead, you can select through page items to get hold of objects that are behind them. Hold down the Command-Option-Shift (Ctrl-Alt-Shift) keys while clicking with either the Item or Content tool to select the object one layer down. The second click selects the object on the next layer down, and so on.



**Marquee.** If you drag with the Item tool, you can select more than one item in one fell swoop. This is called dragging a *marquee* because QuarkXPress shows you a dotted line around the area that you're dragging over. Every picture box, text box, and line that falls within this marqueeed area gets selected, even if the marquee only touches it slightly.

I love the ability to drag a marquee out with the Item tool in order to select multiple objects. It's fast, it's effective, and it picks up everything in its path. However, sometimes it even picks up things you don't want it to pick up. For example, let's say you have an automatic text box on your page and then place some picture boxes on it. If you drag a marquee across the page to select the picture boxes, chances are you'll select the text box, too. You may not notice this at first, but if you group the selection or start dragging it off into a library or someplace else, you'll be taking the text box along for the ride. This spells havoc (press Command/Ctrl-Z to undo the last action).

So, just a quick lesson from people who've been there: Watch out for what you select and group. And if you do select more than you want, remember that you can deselect items by holding down the Shift key and clicking on them.



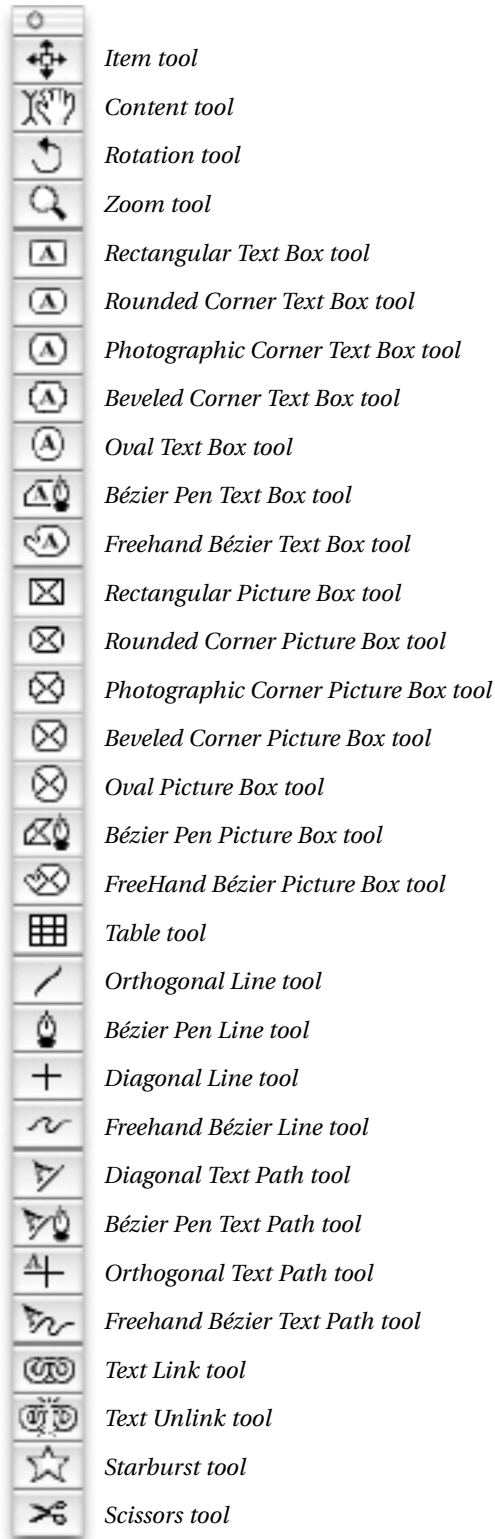
**Tip: Deselecting En Masse.** To deselect one or more objects, you typically need to click a white area on the page (someplace where there are no other



**Figure 3-2**

The item creation tools

*For the sake of the illustration, I've pulled all the tools out of their popout menus and into one long palette.*



## Making Boxes

In earlier versions of XPress, when you wanted a box, you had to clearly specify what kind of box it was—a text box or a picture box—and you had to pick a different tool to create each. And that was it; there was no switching once you had drawn the box. What's more, there were a slew of tools for making different-shaped picture boxes and only one (rectangular) for making text boxes.

But life is better now. XPress offers all the same tools for both text boxes and picture boxes, and although you still have to pick one or the other when drawing a box on your page, you can switch it from picture to text and back again. There's even a new kind of box, called a contentless box, which I talk about in just a little bit.

Creating a box is simple: Choose one of the box tools from the Tool palette, and then click and drag on your page. You can see exactly how large your box is by watching the width and height values on the Measurements palette. Note that you can keep the box square (or circular, if you're using the Oval Text Box tool or the Oval Picture Box tool) by holding down the Shift key while dragging.

All boxes—as items—have a number of basic attributes that you can display and change.

- ▶ Position on the page
- ▶ Size (height and width)
- ▶ Background Color
- ▶ Corner Radius
- ▶ Box angle and skew
- ▶ Suppress Printout
- ▶ Frame size and Style

Of course, text boxes and picture boxes each have a few of their own characteristics, as well, and the Measurements palette and Modify dialog box both change to accommodate these differences.

- ▶ Columns (text box only)
- ▶ Text inset (text box only)
- ▶ Text angle and skew (text box only)
- ▶ Picture angle and skew (picture box only)
- ▶ Suppress Picture Printout (picture box only)

Let's take a quick look at some of these box attributes. I don't cover them all in this section, but don't worry: I cover them all by the time the chapter is through.

(There are several other items in the Modify dialog box and the Measurements palette, too—for instance, the scale of pictures, text runaround, and so on. I hold off discussing these until later in the book, mostly in Chapter 6, *Type and Typography*, Chapter 9, *Pictures*, and Chapter 11, *Where Text Meets Graphics*.)



**Tip: That Ol' Modify Dialog Box.** I use the Modify dialog box for text boxes, picture boxes, lines, and text paths so often that I'm glad to have some variance in how I get to it. You can open the Modify dialog box for a page element in several ways (see Figure 3-3).

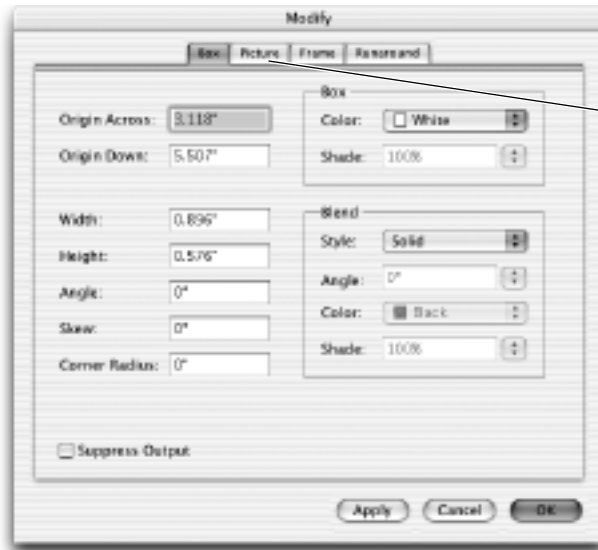
- ▶ Select the item with either the Content or the Item tool and choose Modify from the Item menu. This is for people who work by the hour.
- ▶ Select the item with either the Content or the Item tool and press Command-M (Ctrl-M). This is great if both hands are on the keyboard.
- ▶ You can Control-click on an item (or right-click on Windows) to display a context-sensitive popup menu in which you can choose Modify.
- ▶ Double-click on the page element with the Item tool. (Remember, you can hold down the Command or Ctrl key to temporarily work with the Item tool.) This is my favorite method, as I almost always work with one hand on the keyboard and one on the mouse.

Once you're in the dialog box, you can tab through the fields to get to the value you want to change. After a while, you memorize how many tabs it takes to get to a field, and you can press Command-M, Tab, Tab, Tab, Tab, Tab, type the value, press Return, and be out of there before QuarkXPress has time to catch up with you. That's when you know you're becoming an XPress Demon.

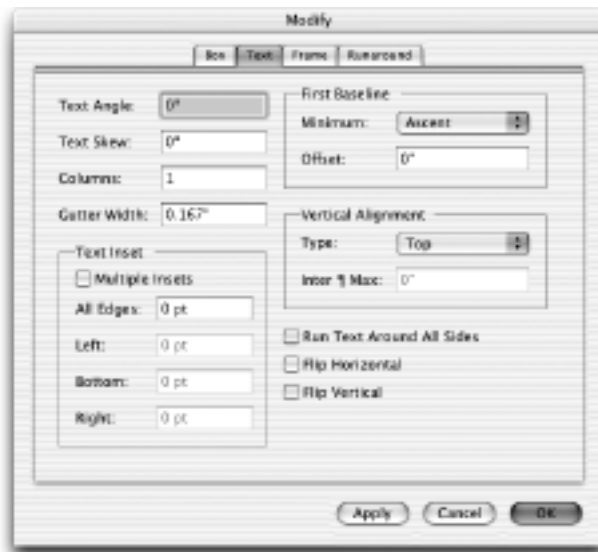


**Position and size.** All boxes are positioned by their upper-left corner. This point is called their *origin*. The first two fields in the Modify dialog box and the Measurements palette are Origin Across and Origin Down. However, unless your box is rectangular, the origin is not necessarily where you think it is because the origin is based on the box's bounding box—the smallest rectangle that could completely enclose the item (see Figure 3-4).

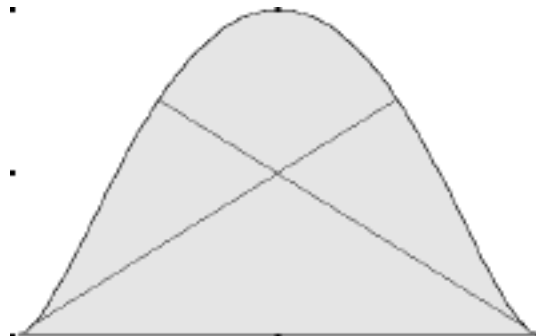
**Figure 3-3**  
The Modify  
dialog box



*The Modify dialog box changes depending on what you have selected*



**Figure 3-4**  
Bounding box  
and position



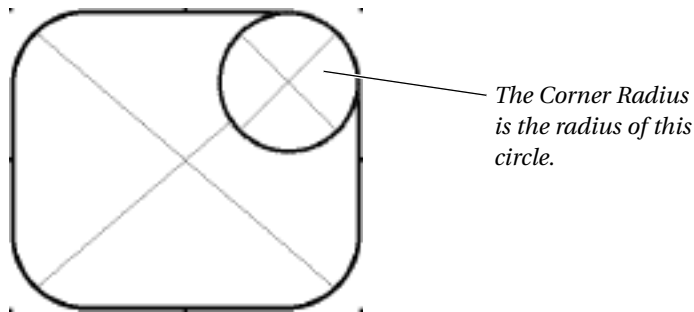
*Handles define the edges of the object's bounding box*



Corner Radius feature in the Modify dialog box lets you set how rounded the corners should be (see Figure 3-5). (On the Beveled Corner box tools, it sets the size of the bevels.) In fact, because you can turn a rectangular box into a rounded-corner box just by setting its Corner Radius, I think there's little reason to ever use the Rounded Corner box tools.

Besides, and to be frank, rounded-corner boxes are one of the most obvious giveaways that you created your document using a Macintosh or Windows machine. Some of the all-time worst designs that have come off of a desktop computer use rounded-corner picture boxes. I really dislike them. But, then again, it's your design, and you can do what you like with it.

**Figure 3-5**  
Corner Radius defines  
how rounded  
the corners are



**Columns.** While the previous several items were applicable to all boxes, the Columns attribute is text-box-specific. Text boxes can be divided into a maximum of 30 columns. Each column's size is determined by the size of the *gutter* (blank space) between columns. You can set the gutter width only in the Modify dialog box, although you can set the number of columns in either this dialog box or the Measurements palette.

Note that you cannot have columns with negative widths: the number of columns you can have is determined by the gutter width. For example, if your gutter width is 1 pica and your text box is 20 picas wide, you cannot have more than 20 columns; however, that many columns would leave no room for text.

**Text Inset.** The last attribute particular to text boxes is Text Inset. The Text Inset value determines how far your text is placed inside the four sides of the text box. For example, a Text Inset value of zero places the text right up against the side of the text box. A text inset value of "3cm" places the text no closer than 3 centimeters from the side of the box.

The default setting for text inset used to be 1 point because the folks at Quark noticed that text set flush against the side of a box is hard to read.

Fortunately, Quark's engineers came to their senses in version 6 and changed the default value to zero points (so the edge of the text is at the same place as the edge of the box). You can change this default setting for your text boxes to zero or any other value (see "Changing Defaults," in Chapter 2, *QuarkXPress Basics*). Or you can do it a box at a time in the Modify dialog box.

Note that you can now also specify the Text Inset value for each of the four sides rather than simply one value for all sides. To change the text inset on a side-by-side basis, turn on the Multiple Insets checkbox.

## Changing Box Type

As I mentioned earlier, you can change a picture box into a text box and vice versa. The trick is the Content submenu (under the Item menu or in the context-sensitive menu). This submenu offers three choices when you have a box selected: Text, Picture, and None. Text and Picture are self-explanatory, though you should note that if there's something in your box (some text or a picture), changing the box type deletes it. The None setting leads us to a feature that first appeared in XPress 4: the contentless box.

**Contentless boxes.** It took 10 years for the engineers at Quark to figure out that we sometimes put boxes on our pages not to contain text or a graphic, but just for the sake of a background color (sometimes known as a tint build). In the past, you had to use a picture box or a text box to do this, with annoying side effects: Empty picture boxes display a big "X" in them; and text boxes, when covered by other boxes, display an overset mark, even if there's no text in them to overset.

Fortunately, QuarkXPress offers contentless boxes, which you can use just for this purpose. To get a contentless box, select a picture or a text box and choose None from the Content submenu (under the Item menu).

Unfortunately, while there used to be a way to get contentless box tools in the Tool palette—in version 4, you could open the Tool tab of the Preferences dialog box and Command-click (Ctrl-click) on the Default Tool Palette button—this feature disappeared in versions 5 and 6.

## Lines and Arrows

The Tool palette contains four tools to draw lines and arrows on your page. To be precise, you really only draw lines, but those lines can be styled in several fashions, and they can have arrowheads and tailfeathers. You can create a line with any thickness between 0.001 point and 864 points (that's a pretty thick line—more than 11 inches thick), at any angle, and apply various styles and colors to it. Like boxes, you can view and change these attributes in the Modify dialog box and—for some—the Measurements palette.



thin, but on an imagesetter it's often too small to be seen. When you print your document, QuarkXPress actually replaces hairlines with 0.125-point rules so you don't get caught in this trap.

However, sometimes the program goofs up: When XPress 4.0 first shipped, many users went ballistic because the program had stopped catching and replacing hairline-width rules. Quark quickly fixed the "problem," so current versions work just fine. Nonetheless, it's always better to specify the thickness of your lines rather than rely on a program to do it.



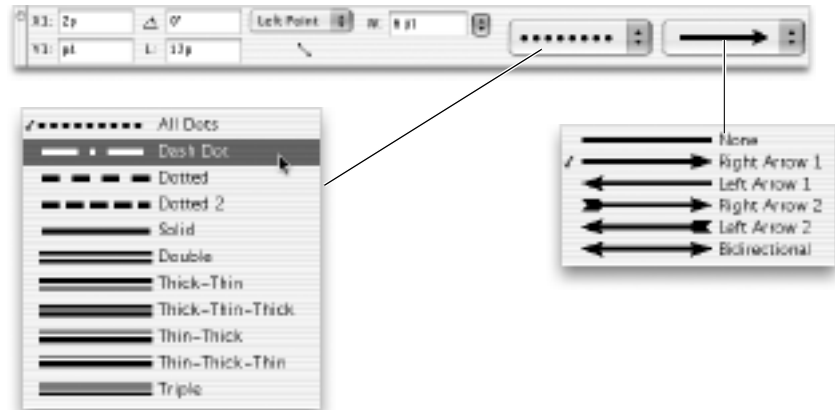
**Color and shade.** You can set the line's color to any color in the document (see Chapter 12, *Color*), then tint it to any value from zero to 100 percent, in 0.1-percent increments (zero percent is white). These specifications are available in the Modify dialog box, the Colors palette, or the Style menu.

**Style and endcaps.** Lines don't have to be boring; spice them up with a new style, or add endcaps to turn them into arrows. You can choose one of 11 different line styles and one of six endcap combinations by selecting them from two popup menus in the Modify dialog box, the Style menu, or the Measurements palette (see Figure 3-6).

Six of the line styles are stripes (multiple parallel lines) and four are dashes (lines with gaps). I discuss stripes and dashes, including how to make your own styles, in "Frames, Dashes, and Stripes," later in this chapter. For now, however, suffice it to say that when you specify a thicker line, the dash or stripe gets proportionally thicker, too (just as you'd expect).

Even though you have six endcap styles to choose from, the choice really comes down to either with arrowheads and tailfeathers, or without them. You can't edit the style of these endcaps, so you're stuck with what's built into the program.

**Figure 3-6**  
Line styles



Note that if you choose an arrowhead that points to the right, the arrowhead you get might point to the left. The reason is that the arrowhead style pointing to the right actually means “put an arrow at the *end* of the line.” XPress remembers how you drew the line—where you first clicked is the beginning of the line, and where you let go of the mouse button is the end. (This is different from the way it worked in earlier versions.) If the arrow is pointing the wrong way, just select the opposite direction in the Arrowhead popup menu.

## Text Paths

The ability to put text on a path is, for many people, alone worth the price to upgrade from version 3. In the past, you had to switch to an illustration program to create this effect, then save the text as a graphic, then import it into a picture box . . . and then if you wanted to edit it, you had to go back to the original program, and so on. Well, no longer!

QuarkXPress offers four text-path tools that appear and act almost identically to the four line tools that I just discussed. While the two Bézier text-path tools are the ones you will probably use the most often, I discuss those in the next section (“Bézier Boxes and Lines”). Let’s start, instead, with the two simple text-path tools: the Diagonal Text Path tool and the Orthogonal Text Path tool. And then let’s look at how you can customize the text on the path to get the effect you’re looking for.



**Tip: Converting Lines to Text Paths.** Just as you can convert a picture box to a line box and back again, you can make any regular line a text path by choosing Text in the Content submenu (under the Item menu). What this literally means is that lines can have content, too. In fact, in many ways a text path acts just like a text box that holds just a single line of text.

To change a text path to a regular line, choose None from the Content submenu.



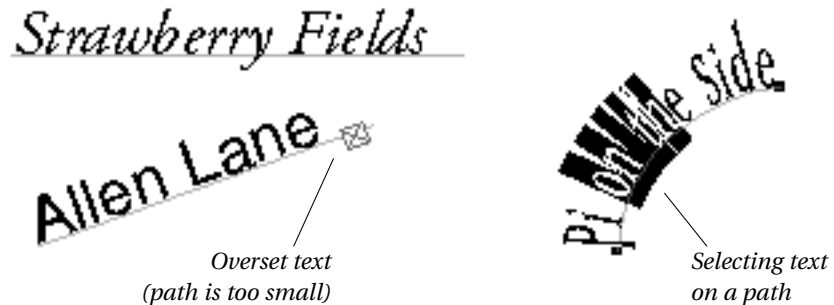
**Drawing with the text-path tools.** When you draw a path with a text-path tool, XPress immediately switches to the Content tool, letting you type along the line (see Figure 3-7). If you hold down the Shift key when you’re drawing the path, the line is constrained to a horizontal, vertical, or 45-degree angle (which makes the Orthogonal Text Path tool a bit redundant).

If you want to edit the text on the path, watch the cursor carefully when you click or drag over the path. Depending on where you place the cursor, the cursor’s appearance changes. If you put it directly over the line, you may get the Edit Segment cursor (I cover this in “Bézier Boxes and Lines,” later in

this chapter). Put it over an endpoint, you'll get the Move Point cursor. It's only over certain parts of the line that you see the Edit Text "I-beam" cursor.

Once again, text on a path acts just like it's in a text box, so you can use all the text editing features that I discuss in Chapter 5, *Word Processing*, Chapter 6, *Type and Typography*, and Chapter 7, *Copy Flow*. In fact, when you select the text path with the Content tool, the Measurements palette appears almost exactly the same as it does with text boxes; with the Item tool, the palette appears as though you had a line selected.

**Figure 3-7**  
Drawing with the  
text-path tools



**Line width and style.** By default, the text paths themselves have a thickness of Hairline and a color of None, which makes them invisible. The text on the path, of course, is a different matter. Every now and again, primarily for special effects, you'll want to change the line's style and weight (see Figure 3-8). You can do so with the same features as with normal lines: the Style menu, the Measurements palette, and the Modify dialog box.

**Text Orientation.** Text paths have a special tab in the Modify dialog box that lets you specify text-path options (see Figure 3-9). The first control you have over text on a text path is the orientation of the text. There are four options, though I should note that none of these has any effect on text paths you create with the Diagonal or Orthogonal Text Path tool. They only affect Bézier text paths. In fact, you can't even convert a diagonal or orthogonal text path to a Bézier curve in order to use these; rather, you have to actually create a new path with the Bézier text-path tools.

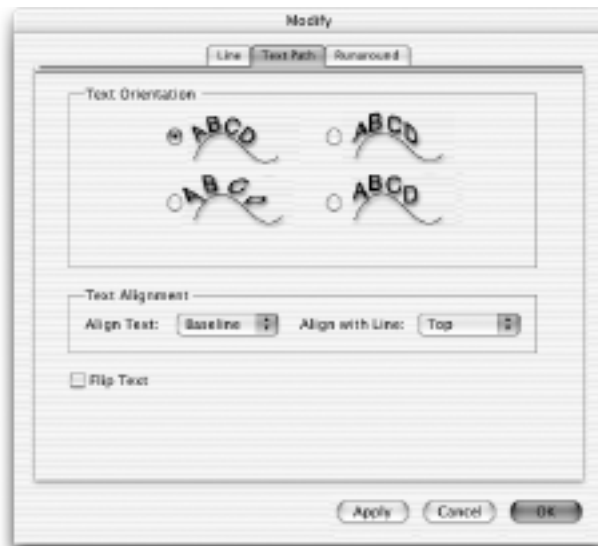
- ▶ **FOLLOW THE CURVE.** The first, and default, setting for Text Orientation forces each character to rotate along the curve. What that means is that each character of text isn't actually curved, even if the path is a Bézier path, but the overall effect is that of a curve (see Figure 3-10). This is what most people want 95 percent of the time.

- ▶ **WARP WITH THE CURVE.** The second option (the one in the upper-right corner) warps the text along the curve, resulting in a quasi-three-dimensional effect. What XPress is really doing is both skewing and rotating each character based on the slope of the curve. First it rotates it along the curve (as in the last option) and then it skews it forward or backward so that the character remains upright. This is useful primarily for special effects.
- ▶ **SKUEW WITH THE CURVE.** The third option (in the lower-left corner) skews each character based on the slope of the curve, but doesn't rotate it. The result is . . . well, strange at best. When the curve is sloping up to the right, XPress skews the text to the left; when the curve goes down to the right, XPress skews the text to the right; if your curve doubles back and heads to the left, the text is flipped and skewed. I bet someone out there has come up with a good use for this, but I haven't.

**Figure 3-8**  
Changing the line  
style on text paths

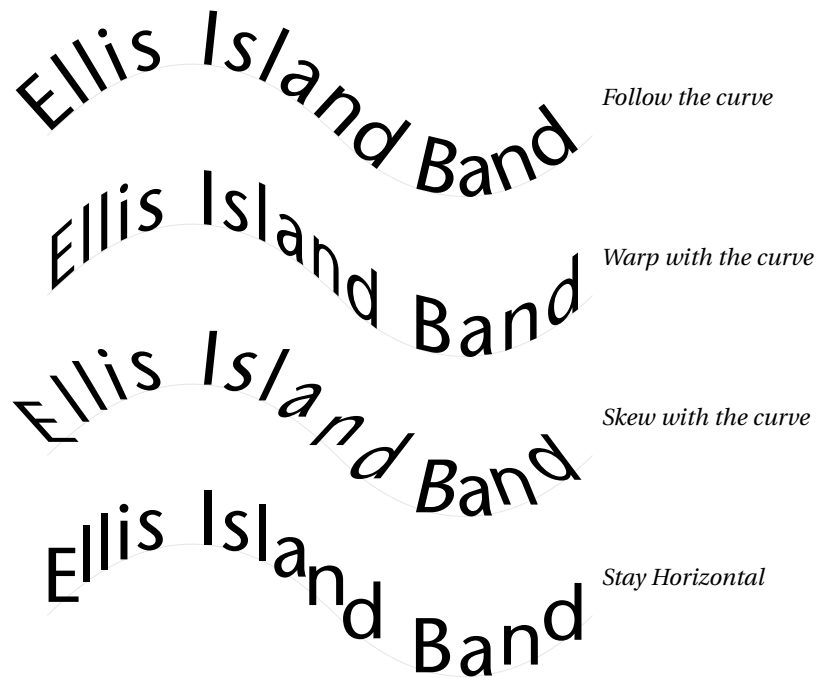


**Figure 3-9**  
Text-path options



**Figure 3-10**  
Text Orientation

*Note that the thin gray lines are included here just for illustration purposes*



- **STAY HORIZONTAL.** The last option ensures that each character is not skewed or rotated as it makes its way along the path.

**Text Alignment.** The next control on the Text Path tab of the Modify dialog box is Text Alignment, which lets you specify what part of the text should align with what part of the path. For instance, the default setting is for the baseline of the text to align with the top of the line (see Figure 3-11). Of course, because the default line is only 0.25 point thick, there is very little difference between aligning to the top or the bottom of the line. If you make the line thicker, however, this makes a difference. (You can make the line thicker and still set the Color to None, making it invisible.)

If you set the Align Text popup menu to Ascent, however, then XPress moves the text down so that the highest ascender in the typeface (like the top part of a lowercase “k”) aligns with the line. You can also choose Center (which centers the font’s lower-case characters—its x-height—on the line) or Descent (which aligns the lowest descender of the font—like the bottom part of a lowercase “y”—to the line).

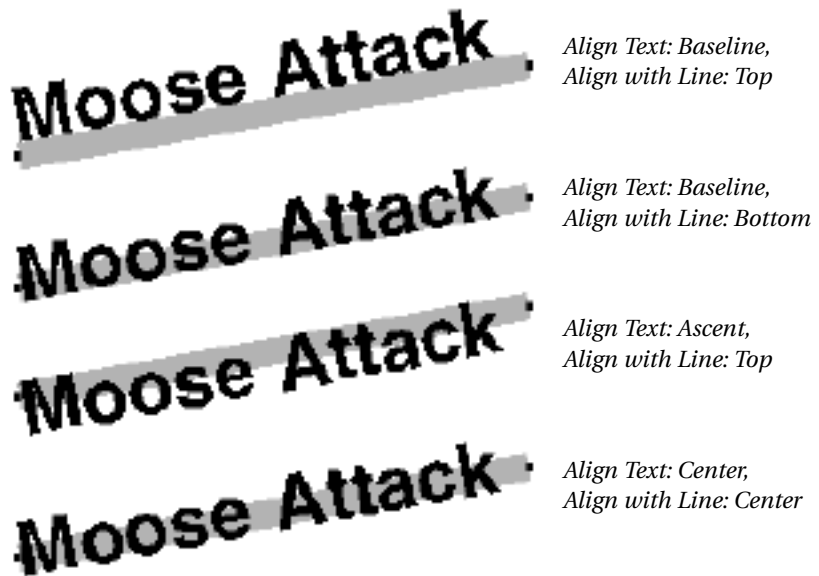
Which setting you should choose depends entirely on your situation, the text, and the type of curve. I find that it’s often worth testing two or three different settings here until I get the effect I like most (remember the Apply button so you don’t have to keep leaving the dialog box each time you try a new setting).

**Flip Text.** The last control in the Modify dialog box that applies to text paths is Flip Text, which doesn't so much flip the text as much as it flips what XPress thinks of as the path. That is, when this is turned on, QuarkXPress starts the text from the last point on the path instead of the first, and the top and bottom sides of the path are reversed (see Figure 3-12). The result is usually a mirror image of the original—except that XPress doesn't mirror the text itself, only the text flow. I find that when I use Flip Text, I almost always have to adjust the Text Alignment settings to accommodate it.

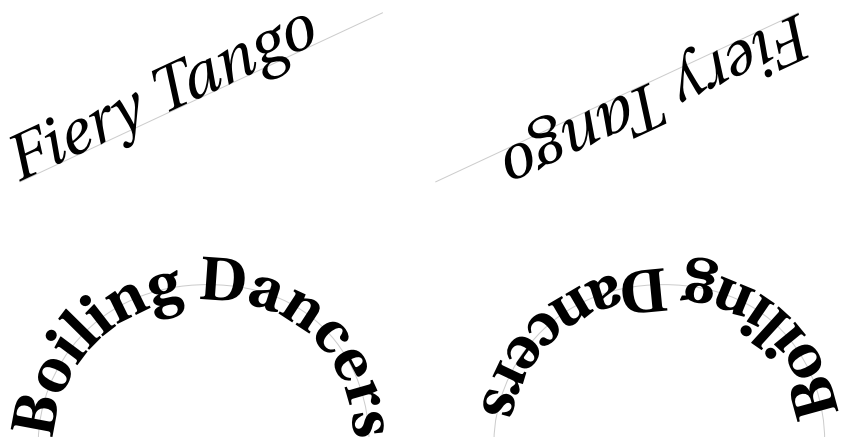


**Tip: Positioning the Text on the Curve.** As I've said before, text on a path acts the same as text in a text box. This means that if you don't like the posi-

**Figure 3-11**  
Text Alignment



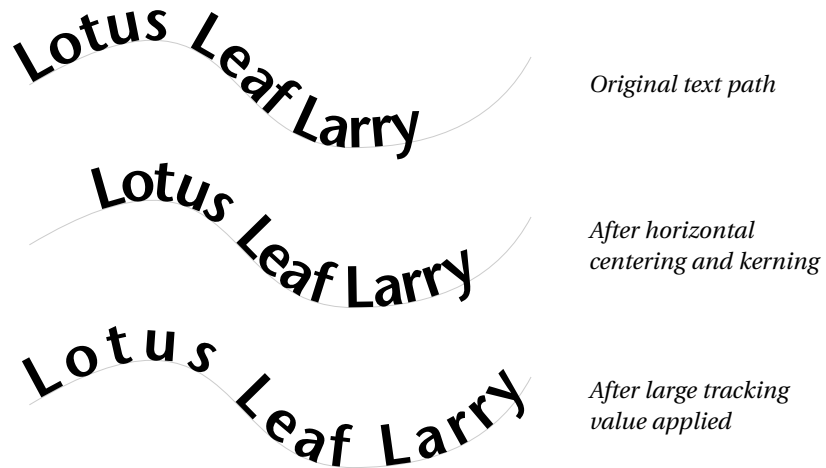
**Figure 3-12**  
Flip Text



tion of the text on your path, you can use the settings in the Paragraph Formats dialog box, like Left Indent and Horizontal Alignment. For example, if you want text to be centered on the path, just place the cursor in the text and change the Alignment to Centered (Command-Shift-C or Ctrl-Shift-C).

You can also add or remove space between characters along the path using kerning and tracking (see Figure 3-13). I discuss all these typographic controls in Chapter 6, *Type and Typography*.

**Figure 3-13**  
Formatting text  
on a curve



## Bézier Boxes and Lines

For most people working in desktop publishing, the addition of Bézier curves to QuarkXPress version 4 was a joyous event. It means that we no longer had to leave QuarkXPress and open an illustration program just to set some text on a path, or draw a simple shape such as a heart to put a graphic in. Creating these kinds of elements has always been a hassle, and editing them was even worse. XPress's tools make editing paths and shapes much easier.

If you are familiar with the Bézier controls in programs such as Adobe Illustrator or Macromedia FreeHand, you will find the controls in XPress to be similar. As in those programs, the Bézier shapes are drawn with a Pen tool. And as in those programs, there are anchor points with handles to control the curves of the Bézier shapes. However, there are some features in QuarkXPress that are unique. This means that you may not be able to pick

**to be continued in print...**