

GUIDELINES

PHHE Checklist for Creating Design Templates & Sample Pages

Project: _____

Designer(s): _____

Last edition: 101807

This checklist is a tool for the designer to use while building the design & template, and for PHHE to use while checking files

Application Preferences

The **new** standard PHHE application preference settings are **included** in the *QuarkXPress Preference file “XPress Preferences”* provided, and match the settings shown in the screen captures in the file named “PHHEDCP_QX6.5_PrefScreens.pdf”. **You must use these preferences as you create your design and template.**

You can find this file in Users/your home folder/Library/Preferences/Quark, and is called “XPress Preferences.prf”. The attached palette displays should match your settings once the preferences are in use (see pages 4-9). Confirm that the preferences are in use, by launching Quark but not opening a file. The attached palette displays should match your settings once the preferences are in use (see pages 10-12).

- PHHE XPress Preferences installed.

General Document Issues

- You must use Adobe Type 1 fonts *owned by Prentice Hall*. If you are picking-up a design which contains a non-Adobe font, find a suitable replacement that is owned by Prentice Hall. If you have questions, consult your PHHE Art Director.
- Avoid choosing a display font that doesn't include bold or italic.
- Create document using facing pages.
- Set the Master Guides on Master Pages to reflect the main type area, not the overall type page. Running heads/feet and folios should set above/below the top/bottom Master Guides; for symmetrical designs, the minor column should set outside left/right of Master Guides; *for asymmetrical designs the Master Guides will include both the minor and main columns*. The main text box must snap to the Master Guides.
- Text Master Pages must be created using Master Page A in order to work with Autopage.
- Optimize use of linked text chains. On Text Master Pages, link from the chain icon (upper left of each page) to the main text box. On Chapter Opener Master Pages, link individual text boxes to each other (do not link to the chain icon).
- Do not place any text on the Master Pages or in library items. The purpose of the master page/library item is to allow a pager to pull down that page/item, flow text in, and have every one be identical in *layout*, not *content*. Now with the new ETM+ workflow all content must be part of the text chain. The only exception to this rule is if there is a drop shadow on text.
- Create page numbers using automatic page numbers (command + 3) on your Master Pages.
- Use separate text boxes for multiple columns, not a single multiple-column box.
- Page layout (for positioning and dimensions) should be done with whole numbers not fractions. When drawing text and image boxes, set your screen view to 100, 200, 300, or 400%

and turn on Snap to Guides. Then Quark will use whole points in the measurement palette. This will help you ensure that objects are consistently sized, and will align accurately.

- Remove boxes used to show trim.
- All bleeding items must extend 9pts beyond the trim on all bleeding sides, including gutter.
- For asymmetrical designs, the main text box should be as wide as your overall page. Therefore all of your style sheets that will visually flush within the ‘main’ column will have left indents equal to the ‘minor column + gutter’. *Please call for Technical assistance.*
- Confirm trim with PHHE staff (manufacturing).
- Code labels in Sample Pages should be put on the pasteboard, not on the page, on top of the item. Labels should be set in the "Normal" font so they are easy to differentiate from the design (remember that Normal displays in 10pt Courier, magenta).
- Do not put any annotations within the Sample Pages. All annotations should be listed in the Document Statistics.
- Every** paragraph of your Sample Pages must have its proper style sheet/character style applied.
- Absolute minimum bottom margin of 3p must not be exceeded during composition (for books using running heads). Text should not be within 1/2” of the trim.

Color Palette

- Colors are named following the C0M0Y0K0 naming convention (no spaces, slashes, or commas; A, B, C, words, etc.).
- Total saturation for a process color is 250%.
- All CMYK colors must be defined as process colors (not Spot Color) in the color dialog box.
- Once your two color design is approved, be sure to swap out Pantone color(s) for Black and Cyan. Two-color designs will not be accepted unless they are in cyan and black.
- When supplying Standard art for a 2 color project, if you create the art as Duotones make sure the second color is named “Cyan” (with a capital C). If you name it anything different, (cyan or Cyan 20%, etc.) it will show up in the Quark color palette as a Spot color.
- Delete all unused colors from the color palette (especially if you are picking-up a design).
- Smallest value of any color (C,M,Y, or K) in a process color should be no less than 5%.
- Smallest value of any single color (C,M,Y,or K) should follow these guidelines: C and M 10%; Y 15%; K 5%.
- Define tints as custom colors, not as tint of another color.

Style Sheets

- Account for every paragraph and character style on the Tagging Guidelines, even if it is to indicate “Set As” another item. Also, you must maintain the order of the Tagging Guidelines.
- When making something “Set As” another style, it must set **exactly** the same as the other item.
- Paragraph and Character Style Sheet names must conform to the Tagging Guidelines. Do not include asterisks in style names.
- Base styles on existing styles when appropriate, such as NL_FIRST and NL_LAST are based on NL_MID with only minor space above/below modifications.
- Do not use ‘Auto’ leading for any item.
- Delete all unused style sheets if you are picking-up a previous design.
- Use First Line indent for paragraph indent, not tabs or spaces. Turnovers for items such as heads and key terms should also be done with first line indents, not em spaces or force align.
- HEADFIRST, CHAP_BM, and CHAP_BM_CON do not have any space above.
- Apply an H&J setting (either ‘Standard’ or ‘None,’ built into our preferences file), to every Style Sheet. For example, most Style Sheets use ‘Standard’ when hyphenation is allowed. Use ‘None’ for heads, Chapter Opening elements, Figure/Table Titles, etc.
- Use ‘Keep lines together’:
 - ‘All lines in ¶’ for heads, marginalia, figure text, Chapter Opening elements, etc.
 - ‘Start:2 End:2’ for paragraphs (including base text, box/case text) and lists (such as BL, NL, and end-of-chapter lists)
 - ‘Start:2 End:2’ for run-in heads.
- Use ‘Keep with next ¶’ where appropriate. For example: use in most heads (e.g., H1, H2, BOX_H1, CASE_H1); but not run-in heads.
- Use Rule above/below instead of the line tool.
- There should be no + sign (local styling) appearing next to a code in the Style Sheet palette. The exception to this is, if within the paragraph there is an additional *character* style applied, such as a European Pi Dingbat bullet on a Times Roman list.
- Do not edit “Normal” style sheet from 10pt Courier in Magenta.

Blends

- Avoid using black in blends.
- Create safe blends using Illustrator or Photoshop— do not use Cool Blends in Quark.

Art Files

- All supplied art must be saved as CMYK (4-color projects), CK (for 2-color projects), or K (for 1-color projects), and must be saved as an EPS file, unless it is grayscale and will be colored in Quark, then save as a .tif.

- If art crosses gutter on a spread, supply two pieces (one recto, one verso), each having a p9 bleed allowance for each bleeding edge. Remember to crop in Illustrator/Photoshop.
- Art must be sized, cropped, rotated or reflected in the original program (Photoshop or Illustrator). Each must be created for recto/verso pages, when layout requires different positioning, widths, or alignment to margins.

Annotated Style Sheets

In order to create your Annotated Style Sheets, you will need to generate the Document Statistics (see below), then write the annotations regarding special characters, relative spacing from one object to another, alignment notes, margins, placement instructions, etc. OR you may annotate the Quark sample document (in Courier, Magenta notes).

- Character style specs should be spelled out: include it's code name, the keystroke for special characters, use of tabs, periods, and then the font/size/cap/color/track/baseline-shift characteristics that make it different than the paragraph style.
 - For example: Under H1 "Each H1 is preceded by character N, tab to entry. Apply char. style H1_DING (18pt, European Pi II, Color C0M80Y40K0).
- Include all page geometry in your Style Sheet document. Measurements for all margins (for the main text page), distance from Running head/foot to text, Chapter Opening element locations, lines per page (for main text page), etc.
- Write specific details regarding content and spacing of Running head/foot content.
- Provide detailed specs on how to set elements such as Figures, Tables, Marginal notes, Boxes, Cases, Chapter rear-matter, etc. Information should include spacing above/below to regular text; sets Top?/Bottom?/Inline?; spacing from text to edge of it's tint panel on all sides; spacing between consecutive elements, etc. If items set differently when they appear at page top/bottom, or when on recto/verso pages, specify details.
- If an item (such as a Case Study) starts a new page, specify. If a section (such as the Chapter Summary) starts a new page, specify. If these elements run-in after preceding section, note that as well. Describe how special items set regarding starting new pages. For example, Chapter Openers start as new lefts or rights, or rights only, or spreads; or Case Study starts new page.

Generating the Document Statistics

1) To use Spec Generator (you will need Quark HTML Text Import and styleExport extensions, and internet access):

Step 1: QuarkXpress

1. Place styleExport extension in the Quark Extensions folder on your hard drive.
2. Open Quark Document containing style sheets.
3. Go to QuarkXpress's Utilities menu
4. Select styleExport and choose Export Styles.
5. File will be saved in same folder as your Quark document with same file name plus .xtg following.

Step 2: Excel

1. Open project's Tagging Guidelines, enabling Macros.
2. Click on Export Style Names in the toolbar.
3. You will be asked for a file name. Make sure there are no slashes, colons, or spaces in the name, then click OK.
4. The file will be saved in the same folder as the TG. This file will have a .txt following the file name.

Step 3: Web Browser

1. Go to <http://64.225.44.168/cgi-bin/specgen.pl>
2. Select the styleExport file from Quark with the .xtg ending.
3. Select the Export Style names document from Excel with the .txt ending.
4. Click "Generate Specs".

What is generated?

QA Report, which contains:

- a. A list of paragraph and character styles listed in the Tagging Guidelines that were not created in the Quark Design Sample.
- b. A list of paragraph and character styles that were created in the Quark Design Sample but are not listed on the Tagging Guidelines.

Generated Specs, which includes:

- a. Trim
- b. Master pages
- c. Fonts
- d. Colors
- e. Paragraph and character style sheets sorted in order of the Tagging Guidelines
- f. A list at the end of the document of paragraph and character style sheets that were not in the Tagging Guidelines.

See PDF file "specgen_user_manual.pdf" for more detailed instructions and visual reference.

Please Deliver to Prentice Hall:

- This completed checklist, including your name.***
- Final Design Sample, Quark document with style sheets applied to all text, and Style Sheet codes labling each first instance of an element in the pasteboard of the electronic file (and on printouts).
- Annotated Style Sheets file (& hardcopy) OR annotated design pages, including all data: paragraph character styles, relative spacing to other objects, page dimensions, placement of floating elements, etc.
- Hard copy of Tagging Guidelines. Please check-off each element in the margin as you have created them.
- Final files of all standard art, icons, blends, background art, etc. Be sure that their size reflects p9 bleed allowances when necessary.
- List of fonts used (must be owned by Prentice Hall).