

Running Headers

**CS2/CS3
InDesign Plug-in**

version 1.0.1

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Running Headers

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“I Have CS3, So I Don’t Need a Plug-In!”

The header variables included with the release of CS3 are very good. They work very well in the context for which they were intended. However, for many situations of complex layout situations, they fall short. *Running Headers* addresses those shortcomings. Following is an overview of the improved functionality available with this plug-in.

1. In CS3, you are limited to basing your headers on either paragraph **or** character styles. In *Running Headers* there is an option to base it on paragraph style, character style, or *both* (a character style within a specific paragraph style).

2. In the “use” dropdown, CS3 has two options: “First” and “Last”.

Running Headers has 6 options: **1.** First Word **2.** First Instance **3.** Last Word **4.** Last Instance **5.** First And Last. The fifth option will put both the first and last instances into the header if there are more than one instance of the same variable text. This enables uses such as “Chapter 1” or “Chapter 2-3” depending on the content of the page. (There is a field for “between text” for such situations.) **6.** Current Instance: This option enables the input of the last found instance of source text unless the source text is the first line of text on the page. When an instance is found on the first line, *or if an instance is anchored to the first line*, that instance will be appear in the header. Otherwise, the *previous* instance will appear in the header.

3. Conditional Text: *Running Headers* has an option to define conditional text. Conditional text replaces the text in the “Text Before” or “Text After” fields. If selected, the conditional text will appear only on pages which does

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not have source text, and if “Current Instance” is selected, the conditional text can appear on a page which the *last instance* was used.

4. CS3 does not allow for choosing the frame order for the source text. *Running Headers* has an option to choose the frame order. The order can be either right-to-left, or left-to-right. These options are especially important in the ME version when using Right-to-Left text. The frame order can also be defined to either go down first and then across or vice versa. (4 options altogether.) This is defined at the variable level, so you can have different frame orders in the same document.

5. CS3 headers are page reflective, meaning they always reflect the content based on which page it appears on. Headers cannot reflect the content on the whole spread. *Running Headers* allows you to select a “Source Range” a source range can be either “Page” or “Spread”. This enables creating “spread reflective” headers.

6. CS3 offers no control over which pages get the header. This requires creating a separate master page for pages which shouldn’t have the header text. *Running Headers* provides three basic options:

a) “Only Include on Pages With Source Style” will only insert a header on a page which actually has text for the header.

b) “Include Last Instance on Pages Without Source Text” will insert a header, if there’s text of a story which has text for the header.

c) “Include Last Instance on Pages Without Story Text” will create headers from the last previous occurrence in the document.

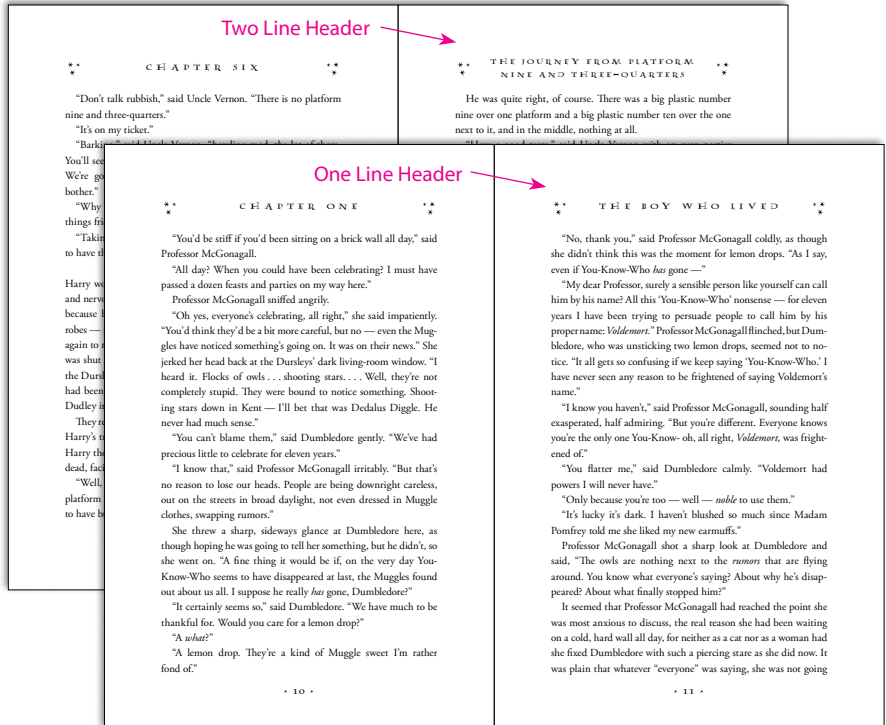
7. *Running Headers* has an option to ignore stories less than x number of characters.

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8. CS3 variables are document-specific. *Running Headers* can create header variables across a whole book file.
9. Running headers can be updated across a whole book file.
10. Alternate Styles: CS3 headers can only be based on one style. If you want the header to be taken from style 1, or style 2, you are stuck! *Running Headers* can define variables based on an unlimited number of styles! If you have variations on your header styles, and want the headers to reflect any of those styles, you can define “alternate styles” for your header definitions. All the defined alternates will be treated as if they are of the same style.
11. Smart Title Case: The standard title case of InDesign is very “dumb”. All words are capitalized no matter what they are. In the real world, this is just about useless. *Running Headers* can create smart title case which is rule-based. The underlying word list is user-definable.
12. Localized Formatting: CS3 doesn’t provide a way to transfer local formatting to the header. The styling must be done using character styling. A header with only one word bold, or italic is impossible. *Running Headers* gives an option to copy local (overridden) formatting to the header. It can even convert italics to the header base weight.
13. Text Composition: CS3 variables (including headers) are treated as a single character. Because of this, headers cannot break across lines. This makes multiple-line headers impossible. *Running Headers* keep the headers as live text, and creates multiple-line header with ease.
14. Punctuation: CS3 gives no control of how it removes punctuation. It is either enabled, or disabled. *Running Headers* gives a number of options. You can even have multi-line /multi-paragraph headers.

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To illustrate some of the unique capabilities of *Running Headers* we are including some screen shots of actual production files which were created using *Running Headers*. The illustrations are courtesy of Brad Walrod.



Shown above is a screen shot from the upcoming 10th-anniversary edition of *Harry Potter and the Sorcerer's Stone*. There are chapters which feature two line headers. *Running Headers* makes it possible to create these automatically, with only one header definition for all the chapters.

The illustration below shows the combined capabilities of the smart title case and the ability to automatically copy local formatting to the header

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text. Note especially, the different capitalization on the two uses of the word “the”.



FIGURE 10.5 ■ *Homo rudolfensis*
This fossil hominid is believed by some researchers to be a separate species from *Homo habilis*, owing to its larger size.

general body plan and overall morphology (bigger brains, smaller faces), here the two species are discussed as *Homo habilis*.

As Leakey and his associates recognized, *H. habilis* differs in its anatomy from the robust australopithecines dating to about the same time in East Africa and South Africa. *Australopithecus boisei* had an enormous chewing complex—its back teeth, jaws, and face were very large—but it had a small brain. In sharp contrast, *H. habilis* had a smaller chewing complex and a larger brain. Combined, the reduced chewing complex and increased brain size gave *H. habilis*'s skull a more rounded, or globular, appearance. Most anthropologists agree that these attributes indicate that *H. habilis* began the lineage leading to modern humans.

Still unconfirmed is the identity of *H. habilis*'s immediate ancestor. The anthropologist Tim White's morphological comparisons between *H. habilis* and the earlier australopithecines suggests that the ancestor was *Australopithecus garhi*, because its face, jaws, and teeth are most similar to *H. habilis*'s. White suggests that the evolutionary transition took place sometime around 3.0–2.5 mya.



Italicized Words *All Caps Source Text*

HOMO HABILIS: THE FIRST SPECIES OF THE GENUS HOMO

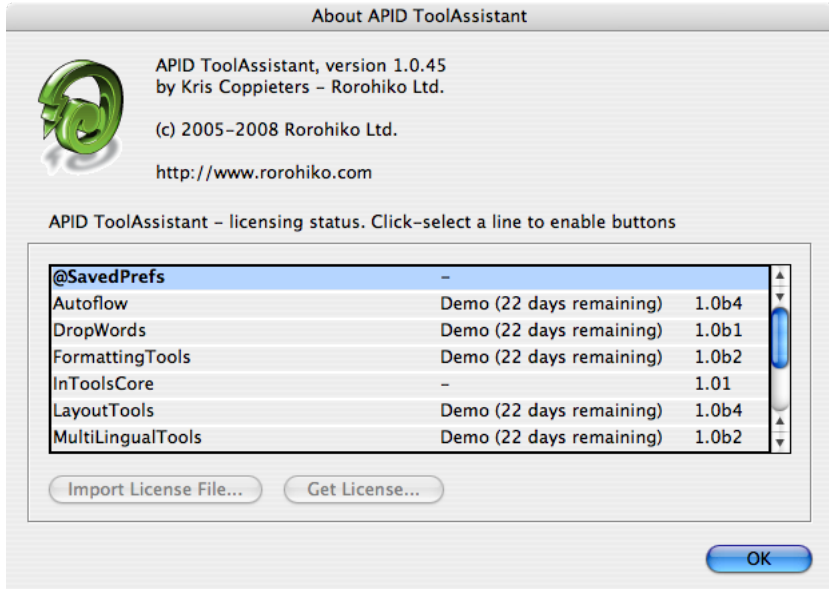
For many years, *Homo habilis* was known from just skulls and teeth. Anthropologists had no idea what the rest of the skeleton looked like. Excavations at Olduvai Gorge in the 1980s by Donald Johanson and his associates led to the discovery of a very fragmentary, but important, skeleton of *H. habilis*, known as “OH 62.”

Homo Habilis: The First Species of the Genus Homo 307

Italics Formatting Retained at Destination Font Weight Text Converted to Smart Title Case

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Installation



Running Headers is different than most plug-ins. It was developed using a product called “APID ToolAssistant” created by Rorohiko. There is a central controller provided by Rorohiko which does a lot of the low-level processing. *If you are interested in the technology behind the development, you can read the addendum in the back of the manual.*

There are four different files which must be installed for *Running Headers* to function properly: 1. APIDToolAssistantCSx.xxx (the exact name depends on your version) 2. @SavedPrefs.spln 3. InToolsCore.spln (version 1.04) 4. RunningHeaders.spln (version 1.01). Additionally, for the customization of the smart title case you should place the files “_title_lowercase.txt” and “_title_specialcase.txt” in your plug-ins folder as well.

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All of these files need to be copied to InDesign's plug-ins folder. They may be copied to a sub-folder, but they must all be in the same one!

Please note: APID ToolAssistant replaces an older version of the plug-in. In the past, there were two versions of the API plug-in distributed by Rorohiko. Active Page Items Developer (APID), was the version developed to work with externally developed plug-ins. The free Active Page Items Runtime (APIR), was for plug-ins developed internally at Rorohiko. If you have either of these two plug-ins installed, you must remove them and install the APID ToolAssistant instead. The older APIR or APID plug-ins will not work. You must have the most current version of the APID ToolAssistant installed (version 1.0.45).

Shown above is the “About” window of API. This window can be brought up in two ways: 1. Select InDesign → About Plug-Ins → Rorohiko Ltd. → APID ToolAssistant... 2. API → APID ToolAssistant...

In-Tools plug-ins do not show up separately in the “About Plug-Ins” menu. Information on installed In-Tools plug-ins are only displayed in the “About” window of API. If the plug-ins are properly installed you should see the displayed window (or the equivalent Windows version).

Please note the API version number near the top of the window. Your version number must say 1.0.45 or higher. Additionally it must say “APID ToolAssistant”. If it says “Active Page Item Developer” or “Active Page Item Runtime”, you have the wrong version installed. As mentioned above, both of these versions have been replaced with APID ToolAssistant.

When in doubt: search your plug-in folder for a file whose name contains “ActivePageItem”, and replace it with the new one.

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In the “About” window, there is a list of all installed plug-ins and their status. The first column lists the plug-ins. The second column shows the license status. If the plug-in is licensed, “Licensed For APID” will be displayed. If the plug-in is in demo mode, the word “Demo” will be displayed along with the number of days remaining until the plug-in expires. The third column shows the plug-in’s version number. When trying to determine that you have the most current version of a plug-in, please refer to the version number listed in this column.

Enabling and Disabling Plug-ins.

To enable or disable any individual plug-in, simply move the file into or out of the folder which contains the APID ToolAssistant plug-in. One simple solution would be to create two folders within your plug-in folder. Name one “API”, and the other “API disabled”. You can then easily move files back and forth.

The APID ToolAssistant is like any other plug-in, and InDesign must be restarted when it is installed or removed. However, the rest of the plug-ins do not require a restart of InDesign when they are installed or removed. Newly installed plug-ins are available in documents when they are opened. If there are open documents when you install any of the *.spln files, those documents should be closed and reopened.

Please note: In-Tools plug-ins are unique, in that menu items will not appear until a document is opened. The plug-ins will appear in the plug-in list in the “About” window, but menu items only appear after a document is opened or created.

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Purchasing Licenses and Activation

There are two ways to purchase In-Tools plug-ins: They can be purchased from the In-Tools web site prior to activation, or they can be purchased directly from within InDesign. If the plug-ins are purchased from the web site, you will establish a login and password for activation at the time of purchase. If you purchase the plug-ins from within InDesign, the payment and activation both occur simultaneously. If you plan to purchase a plug-in package, or would like to purchase a number of plug-ins in one transaction, you should purchase them from the In-Tools web site before you initiate the activation process.

No matter how you purchase the plug-ins, the process from within InDesign is the same:

1. Select the plug-in you would like to activate.
2. Click “Get License”. This will take you to the log-in page of the In-Tools web site.

The screenshot shows a web interface for logging in or creating an account. It is divided into two main sections. The top section, titled "Customer Login", has a light blue background and contains a message: "Please login using your email address and password to continue." Below this are two input fields: "Email Address:" and "Password:", each followed by a text box. A "Login" button is positioned below the password field. The bottom section, titled "If you do not yet have an In-Tools account, create one below.", also has a light blue background and contains a message: "Please enter your email address and choose a password. You will use this password to login to your account in order to install a license from within Indesign." Below this are four input fields: "Name/Company:", "Email Address:", "Choose a Password:", and "Confirm Password:", each followed by a text box. A "Submit" button is positioned below the "Confirm Password" field.

Customer Login

Please login using your email address and password to continue.

Email Address:

Password:

Login

If you do not yet have an In-Tools account, create one below.

Please enter your email address and choose a password. You will use this password to login to your account in order to install a license from within Indesign.

Name/Company:

Email Address:

Choose a Password:

Confirm Password:

Submit

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If you already have an In-Tools account, fill in your login and password. Otherwise create an account now. If you already paid for your plug-ins, make sure you fill in the login information you provided at the time of purchase. You *must* provide a valid e-mail address or you might not receive your license file.

3. If you have not yet paid for the plug-in you will be taken to a PayPal payment page. On successful completion of the payment, you will be returned to the log-in page.

4. After successfully completing the log-in procedure, you will either get a link to download a license file, or you will receive one by e-mail depending on various factors). Please allow one to two business days to receive an e-mail with the license file. The license file is specific to the installation from within which you have activated the license. It will not work on a different installation, even with the same serial number. If you need to use In-Tools plug-ins with more than one installation of InDesign, you will need to purchase an additional license for each installation.

5. Once you have your license file, go back to the “About” window in InDesign, select the plug-in you are activating and click on “Import License File”. Locate the file on your hard drive and click “Open”. The status next to your plug-in will change to “Licensed”.

Please note: After the trial period of In-Tools plug-ins expire, they will only work if *both* the In-Tools plug-in *and* the APID ToolAssistant is licensed. Only one license of the APID ToolAssistant is required per installation of InDesign. If you are not sure whether your installation of the APID ToolAssistant is licensed, make sure you purchase the plug-in using the “Get License”

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button. The In-Tools activation software will automatically determine if you require the license for APID, and create a double license if necessary.

Basic Use:

Conceptual Introduction:

Running Headers works on a principle of “building blocks”. Each variable definition can be one element in a string of header text. Header text can be composed of any number of header variables, as well as static header text.

For example: Your header text can be composed of <Author> <Book Title> <Chapter> <Chapter Number> <Chapter Name> <Page number>. These can all be in the same text frame, and any number of items can be variables, or static text.

Setup:

Preparing Your Document

Before you create your header variables, you should follow these steps:

1. Create a text frame on your document master page. Your header text will be placed in this frame.
2. Select the frame and Select Layout → Running Headers → Label Header Frame...
3. Type in (or select) a label for you header frame. The name of the label is unimportant, but it should be something which you will be able to identify later on.

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4. Create a character style with the correct styling (if any) for your variable header text. It is advisable to name it something which includes “header” or something of the sort. If you are using CS3 and use style groups, make sure the style has a unique name (to avoid confusion later on).
5. In your header frame, type in some text. The actual text you type is completely unimportant. It can be a description of your header, or a space, or anything else you want. The only important factor, is that the text is positioned within the header frame where you want your header text to go.
6. Select the text you just typed in step 5, and apply the character style you created in step 4.

Now you are ready to create your header variable.

- ▶ If you have more than one header frame on the page, and don’t have any special styling for the header text, (which can’t be set on the paragraph level), one character style can be used for all the headers **provided that there is only one variable per frame!**

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Creating Your Variable

There are many options when defining headers variables, but the defaults should be correct for most uses. Assuming the defaults are correct, there are only a few things which need to be selected. The functionality of *Running Headers* is the same in both CS2 and CS3, but the user interface is enhanced for increased usability in the CS3 version. Below are screen shots of the user interface for both CS2 and CS3.

CS 2

The screenshot shows the 'Define Header Variable' dialog box in CS2. The dialog has a title bar 'Define Header Variable' and two buttons 'OK' and 'Cancel' in the top right corner. The main area contains several groups of controls:

- Variable Name:** A text field containing 'Header 1'.
- *Variable* Style:** A dropdown menu set to 'Header'.
- Header Frame Label:** A dropdown menu set to 'Header Frame'.
- Source Char. style:** A dropdown menu set to 'Any'.
- Source Para. style:** A dropdown menu set to 'Section Header'.
- Copy Local Formatting:** An unchecked checkbox.
- Italics at Base Weight:** A checked checkbox.
- Source Range:** A dropdown menu set to 'Page'.
- Type:** A dropdown menu set to 'First Instance'.
- Frame Order:** A dropdown menu set to 'Top,Bottom,Left,Right'.
- Change Case:** A dropdown menu set to 'No Change'.
- Punctuation:** A dropdown menu set to 'Remove Trailing White Space'.
- Text Before:** An empty text field.
- Text After:** An empty text field.
- Text Between/Conditional:** An empty text field.
- Conditional Text:** A radio button set to 'After'.
- Options:** A section with three radio buttons: 'Only Include on Pages with source style' (selected), 'Include Last Instance on Pages without source style', and 'Include Last Instance on Pages without story text'.
- Include Conditional Text:** Two checked checkboxes: 'When No Source is on Page' and 'When Next Source is on Page'.
- More Options:** A section with a text field 'Ignore Stories Less Than' set to '100' and a label 'Characters'.

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CS 3

Define Header Variable

Variable Definition

Variable Name:

Variable Style:

Header Frame Label:

Source Styles

Source Char. style:

Source Para. style:

Settings:

Source Range:

Type:

Frame Order:

Change Case:

Punctuation:

Text Before:

Text After:

Conditional Text:

☐ Before ☒ After

☐ Copy Local Formatting ☒ Italics at Base Weight

Options:

☒ Only Include on Pages with source style

☐ Include Last Instance on Pages without source style

☐ Include Last Instance on Pages without story text

Include Conditional Text

☒ When No Source is on Page

☒ When Next Source is on Page

More Options:

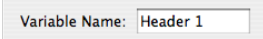
Ignore Stories Less Than Characters

As you can see, the layout of the dialog is somewhat different between the two versions, but the options are basically the same.

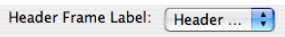
Basic Setup

There are four basic things which must be chosen while setting up the variable.

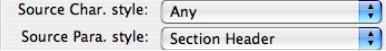
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1. Name your variable:  Type into this field the name of your variable. What you name it is unimportant. It should be whatever name is easiest for you to identify.

2. Pick your variable style:  Here is a drop down list of all the character styles in your document. Select the character style which you set up in step #4 in the previous section.

3. Select your header frame label:  Here is a drop down list of all labeled frames on document master pages. Select the label you used in step #3 in the last section. *Note: If you labeled a frame on a regular page (i.e. not a master page), that label will not show up in the list. You **can** use frames on regular pages, but you must label a frame on a master page somewhere with the same label. The master page does not need to be used.*

■► Header frame labels are not required. The headers can be set up without them. It is however, advisable to use them. There are four reasons for using the labels: **1:** The updating of headers is quicker when labels are used. **2:** If labels are not used, it is necessary to override all master frames for the headers to properly update. This makes a mess of your pages. **3:** The use of labels allows for semi-automatic removal of overrides on header frames. **4:** The labels enables the use of just one character style for any number of header frames.

4. Pick your source styles:  The source styles are the applied styles in the text which will be picked up to be copied to your header (i.e. the text which will “fill” your variable text). You must select a style. It can be either a paragraph style, a character style, or both. If you select both a paragraph style and a character style, the only time text will be applied

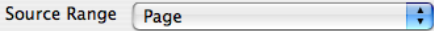
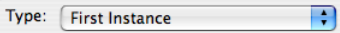
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to you header, is if you have the selected character style *within* the selected paragraph style. If the character style is applied to text in a different paragraph, the text will be ignored. *Please note: Characters are only found if the character style is applied directly. Styles applied through nested styles will not be found.*

Congratulations! You have succeeded in setting up a basic running header. If you have properly followed all the steps, when you select Layout --> Running Headers --> Update Document Headers the headers will be updated to reflect the page text.

Additional Settings:

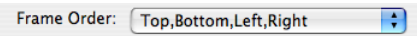
While the default settings for headers might fit your needs, it is very probable that they won't. The options for updating the headers are very powerful and very easy to set up, but it does require some understanding of what each option does. Below is a list of all the selectable options, and instructions on how to use them.

1. Source Range:  This option allows definition of either “page headers”, or “spread headers”. Page headers will find instances on the same page only, while spread headers will find instances on the whole spread.
2. Type:  Here is a drop down list with a list of five options: 1: First instance: This option finds the first instance of your selected style on the page. 2: Last Instance: This option finds the last instance of your selected style on the page. 3: First word: This option finds the first word on the page with your selected style applied. 4: Last word: This option finds the last word on the page with your selected style applied. 5: First and Last Instance: This option inserts both the first and the last instance of the selected style on the page into the header placeholder.

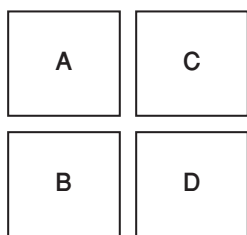
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When selecting this option you should select the text which goes between the two instances in the “Between” field, below. If the headers are selected to run also on pages without source text (below), the last instance will be used on following pages. 6: Current Instance: The text inserted in the header using this option depends on where the source content is located. If there is no source text found, the header will show the last found instance. If there is source text found *but it is not in the first line of text on the page*, the last found instance will also be used. If there is source text in the first line on the page, or the text is anchored to the first line, the found source text will be used.

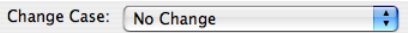
- ▶ The first and last instances can span more than one paragraph. This offers the ability to create multi-line / multi-paragraph headers. Using the appropriate “Remove Punctuation” option (below), multiple paragraphs can be compressed into one, or be left as separate paragraphs. However, care must be taken when applying styles to ensure that more text than intended isn’t copied to the header.

3. Frame Order:  This option sets the search order for the text. The search order determines what is considered the “first instance/word” and what is considered the “last instance/word”. Since this setting is set on the individual variable level, you can have more than one such setting per document. This is especially useful when laying out multi-lingual books in which some of the text is right-to-left, and some is left-to-right. There are four frame order options: 1: “Top, Bottom, Left, Right”. 2: “Top, Bottom, Right, Left”. 3: “Left, Right, Top, Bottom”. 4: “Right, Left, Top, Bottom”.

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The diagram on the left illustrates four text frames on a page. If option 1 is selected, the search order will be “A, B, C, D”. If option 2 is selected, the search order will be “C, D, A, B”. If option 3 is selected, the search order will be “A, C, B, D”. If option 4 is selected, the search order will be “C, A, D, B”.


4. Change Case:  These settings give you the option to change the case of the words which are inserted into your header. The options are fairly straight-forward. The choices are: No Change, UPPER CASE, lower case, and Title Case. Except for title case, they are pretty self-explanatory.

Title case works intelligently. This means that only words which are “supposed to” be capitalized in a title are capitalized. The rules which the title case uses are as follows:

The first and last words are always capitalized, as well as any word following a period (full stop) or colon. Any compound word separated by a “/”, “,”, dash or m-dash will have the letter immediately following the separator capitalized. Any other word will be capitalized unless it appears in the `_title_lowercase.txt` file. Any word appearing in the file will be lowercase only if it is not a “starting” word. For example: In the title, “The Last of the Mohicans” — The first word “the” will be capitalized, while the second word “the” will not. This is because the first word is the beginning of the sentence. Similarly, in the title “Lion: The King of the Jungle” the first word “the” will be capitalized because it follows a colon. The lowercase word file can be edited to include any words you like. All words should be separated by a single space.

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Any word appearing in the `_title_specialcase.txt` file will always be capitalized exactly as it appears in the file, regardless of position. This is useful for words like “InDesign”, “USA”, “UK”, etc., which have capitals in the middle of the word. This file can also be used to force lowercase on specific words and override the default rules. So, let’s assume you would like the word “a” to always be lowercase, even if it is the first word in your header text. You would simply put the word “a” in your special case file, and it will always be lowercase. When a word appears in both files, the special case file trumps the lowercase one.

5. Punctuation Removal:  *Running Headers* offers a number of options for punctuation removal: **1:** Don’t Remove. **2:** Remove Trailing White Space. **3:** Remove All Extra Space. **4:** Remove Trailing Punctuation. **5:** Remove All Punctuation.

Don’t Remove does exactly that. It will remove nothing. This includes any trailing returns you might have. If you select a paragraph style as your source style, and select Don’t Remove, you will get a return after the header text. This might be useful if you want a header which spans a number of lines, but if not, your trailing static text in your header will likely “disappear” when it gets overset by the extra return.


The default setting is “Remove Trailing White Space”. This is the most common need in headers. It will remove any spaces, tabs, returns, soft returns, or what-have-you, which follow the found text.

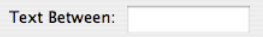
“Remove All Extra Space” will convert all of the above mentioned characters to regular spaces. It will also convert double spaces to single spaces. So, if you have two paragraphs which will both go into the header, and you need it to become one, “Remove All Extra Space” will do that for you.

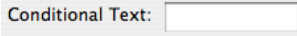
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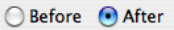
“Remove Trailing Punctuation” does everything “Remove Extra Space” does, but it will also remove trailing punctuation. This includes “.,?";!”

“Remove All Punctuation” will remove all extra spaces and all punctuation, regardless of where it is situated.

6. Text Before / Text After:  These two fields are for text which should be inserted either before or after (or both) your variable text. The reason you might want to use this option rather than simply typing the text into your header frame, is that text will not appear on a page which doesn't receive variable header text. (See below about inclusion options.)

7. Text Between:  This option is to be used in conjunction with the “First and Last” option described in option #1. This is the static text to be inserted between the two, in the event that there is both the first and the last instance to insert into the header. If there is not two instances found, this text will be ignored. In the CS3 version, this option is grayed out until you select “First and Last Instance”.

8. Conditional Text:  This option is available *if any type besides “First and Last”* is selected. It will replace the “Text Before” or “Text After” in cases where the source text does not appear on the page. In the case the “Current Instance” is selected it will replace the “Text Before” or “Text After” on pages which have a found instance, but is not on the first line (which causes the last instance to appear). Both of these options are optional. (See below #13)

9.  This option determines whether *conditional text* (above) replaces the “Text Before” or the “Text After”.

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10. Copy Local Formatting: ☐ Copy Local Formatting This option should be checked if you want local formatting to be copied to your header. The definition of “local formatting” depends on what kind of styles you selected as the source styles. If you selected a strictly paragraph-based header (i.e. you selected “Any” as the character style), local formatting will be defined as any characters styled differently than the paragraph style. This can be through character styles, or as local overrides. If however you selected a character style as your source style, local formatting will be defined only as local overrides. *Please note: Copy Local Formatting cannot be used together with Remove All Punctuation. In the CS3 version it will not be selectable, and in the CS2 version, you will get a warning.*

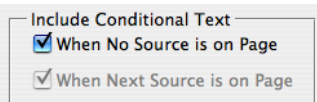
11. Italics at Base Weight ☒ Italics at Base Weight This option is to be used in conjunction with “Copy Local Formatting”. If this option is checked, and your local formatting contains italics, the italics will be applied at whatever weight you set your headers. This option assumes your font uses standard naming conventions. It only works if italics is named as such. It will not work for oblique or tilted or whatever other terms might be used. Some fonts have a number prefix for different fonts in a family. Such named fonts will not work either, because the names will not match. It also assumes that the base weight is called “Regular”. If it’s called “Roman” or some other name, and the header is styled at that weight, it will not work either. It *will* however work with fonts which have different optical sizes.

12. Inclusion Options: ☒ Only Include on Pages with source style
☐ Include Last Instance on Pages without source style
☐ Include Last Instance on Pages without story text There are three inclusion options. The first option will only create header text if there is text on the page to transfer. The second option will create header text from the last instance, if there is a story on the page which has the style selected in the variable. The third option will create header text from the last instance on every sub-

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sequent page. The “Last Instance” can be either a word or a found instance, depending on the header type.

13. Conditional Text Options: there are two checkboxes. These define when the *conditional text*



In this section, checkboxes is used (see

#8). If the first checkbox is selected (When No Source is on Page), the conditional text is used on pages which have no source text at all. The second checkbox is for use in conjunction with the “Current Instance” option. When “When Next Source is on Page” is selected, and the “Current Instance” is selected, the conditional text will be used when the previous instance is used and a source is found on the page (i.e. the found source text is not in the first line of text).

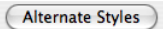
14. Limiting Story Size: Ignore Stories Less Than Characters This option ignores stories smaller than the specified size. The purpose of the limit is to speed up the updating of the headers. Setting this properly is extremely important! If the number is set too high, your text can be missed. If the number is set too low, and you have a lot of short stories (for example – side heads), updating headers can take considerably longer!

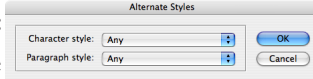
Alternate Styles

This option is designed to deal with situations where there is more than one style used in similar fashions. This enables any number of styles to be used to define the header variable. The correct instance of any one of these styles will produce header text.

The setup of the alternate styles is somewhat different between CS2 and CS3. In CS2 the alternates are defined using a menu item: Layout → Running Headers → Define Alternate Style. The menu item needs to be selected

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again for each alternate defined. In CS3 the alternates are defined from within the variable definition dialog. Using this Button:  in CS3 will bring up a dialog which allows the creation and deletion of alternates. In both CS2 and CS3, choosing to create a new alternate will bring up a dialog which looks something like this:



The drop-down lists in the dialog. The drop-downs are the same as the main style definitions. Any combination of character styles and paragraphs styles can be defined as alternates. These settings can be set irrelevant of the main style settings. The only limitation is that there must be at least one style selected.

There are two options in the

Updating Headers

Running Headers does not work dynamically. This means that updating headers is required after the initial setup, and then again after each re-flow of text which could affect the header content. It is however, very easy to update them. Simply select “Layout → Running Headers → Update document Headers”. This will update all of your defined header variables.

Header Frame Overrides

When *Running Headers* updates the header text, any header frames which reside on master pages are automatically overridden. This means that the frames which started off being on the master page and were not editable, become located on the individual pages and are editable like any other text frame. This is analogous to command/control-shift-clicking on a master frame.

This can become an issue when re-flowing pages, and especially when applying master pages. When applying a new master page to an existing one,

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any overridden master page items get completely detached from the master page, and if the item exists on both masters, you wind up with double items. This is particularly an issue with header frames. When the duplicate frames appear on the page, both copies will get updated by *Running Headers*. This situation can be avoided in one of two ways: The header frame can be removed from the master page that is being applied. This leaves only the original frame. A better way is to select “Remove Overrides on Header Frames...” before applying the new master. This will return the (chosen) header frame on selected pages to the master page (and will revert any variable header text to the default master text). Applying a new master page at that point will only result in the copy appearing on the new master page.

■■■■➔ Another instance where choosing this option is advisable, is while running the *Column Flow* plug-in across pages which have header text. There are times where *Column Flow* will try to remove pages, and be unsuccessful because of the overridden header frames. This will result in extra blank pages after the flowed stories with only the header frames on them. Removing overrides will avoid this issue.

Stacking Order and Groups

When overriding master page objects in InDesign, the stacking order can be effected. This is because master page items are always below regular page items. When master page items are overridden, they become regular items, which sometimes causes changes in the stacking order. The exact behavior was changed between CS2 and CS3. In CS2, all items when overridden are moved to the top of the stacking order, while in CS3 they are kept on the bottom of the stacking order. When overriding master header frames, *Running*

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Headers always overrides them in the order in which the header variables are defined.

If the stacking order of header frames is important, it can be handled in one of a few ways: **1.** Place the header frames on different layers. Objects on different layers keep their stacking order when overridden. **2.** Group the frames. If a header frame is grouped with other objects, the entire group will be overridden together. When removing overrides on the header frames, the entire group will be returned to the master page as well. **3.** Make sure to define the header variables in the order which will keep them stacked properly: For CS2 this would mean defining the bottom-most one first. In CS3, the top-most one should be defined first.

Please note: Overridden header frames should not be grouped or ungrouped on local pages. If they are not kept in their previous “grouped state”, removing overrides may not work correctly.

Book Files

Headers can also be run on all documents in a book file. To run the headers on a book file, both the book file and any single document must be open.

Running headers on book files is a two step process. First the header variables must be synchronized across all the book files. The defined master document is used for the definitions. Once the book documents all have their header variables defined, all that needs to be done is select “Update Book Headers”. This process updates all the book files, but doesn’t save them. Rather, it leaves them all open so you have the option of reviewing the changes before saving and closing the files.

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Addendum

What is “APID ToolAssistant”?

Classically, there are only two ways to automate InDesign. One way is by scripting. Scripts are a series of commands written in one of the three supported scripting languages — AppleScript for the Macintosh, Visual Basic for Windows, or ExtendScript for both platforms. ExtendScript is Adobe’s version of javascript. For scripts to run, they must be placed in the application script folder and explicitly run. For automation to be truly automatic, it requires “event processing”. This means that certain events trigger specific processes to take place. There is limited event-triggered scripting available in CS3.

To achieve true integration, plug-ins must be programmed using C++. Developing C++ plug-ins is a very involved, and lengthy process. APID ToolAssistant is a plug-in which allows very fine grained event processing using ExtendScript. It allows for creation of advanced plug-ins in a fraction of the time required when programming using C++. It also aids in the creation of hybrid plug-ins which mix ExtendScript and C++ for maximum efficiency.

Without the APID ToolAssistant, it would not have been possible to create the collection of plug-ins we offer in the same amount of development time. This increased programming efficiency means more functionality for the end user and lower prices.

Additionally, APID ToolAssistant offers the ability to attach scripts to specific objects. These attached scripts can be run automatically when triggered by specific events. Anyone who has a licensed version of the APID ToolAssistant plug-in installed can create and use these attached scripts. There

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are also additional scripting properties and methods which are usable by scripters. For more information see Rorohiko's web site.

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