



Migrating to Quark Publishing System Classic 3.6

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Introduction

Before you begin, take time to review this chapter so that you understand how the guide is structured and how you can get the most out of it.

ABOUT THIS GUIDE

This Guide explains how to migrate your server settings and assets from any earlier version of QPS® Classic to QPS 3.6.

WHAT WE'RE ASSUMING ABOUT YOU

In writing this guide, we assume that you are familiar with your computer and know how to:

- Launch an application
- Open, save, and close files
- Use menus, dialog boxes, and palettes
- Work within a networked computing environment
- Use the mouse, keyboard commands, and modifier keys

Consult the documentation provided with your computer or other resources if you need more information in any of these areas.

CONVENTIONS IN THIS BOOK

Formatting conventions in this guide highlight information to help you quickly find what you need.

- **Bold type style:** The names of all dialog boxes, fields, and other controls are set in bold type. For example: “Click **OK**.”
- **References:** In descriptions of features, parenthetical references guide you in accessing those features. For example: “The **Modify** dialog box (**Item** menu) lets you format items.”
- **Arrows:** You will often see arrows (→), which map out the menu path to a feature. For example: “Choose **Item** → **Modify** → **Text** to access the **Columns** field.”

- **Icons:** Although many tools and buttons are referenced by name, which you can see by displaying ToolTips, in some cases icons are shown for easy identification.
- **Cross-platform issues:** QPS components are quite consistent across operating systems. However, some labels, buttons, key combinations, and other aspects of QPS components must differ between Mac OS® and Windows® because of user interface conventions or other factors. In such cases, both the Mac OS and Windows versions are presented, separated by a slash, with the Mac OS version presented first. For example, if the Mac OS version of a button is labeled **Select**, and the Windows version is labeled **Browse**, you are directed to “Click **Select/Browse**.” More complex cross-platform differences are mentioned in notes or parenthetical statements.

Chapter 1: Preparing to migrate

This chapter gives an overview of the process of migrating to QPS 3.6 and provides minimum system requirements and deployment settings.



Quark recommends using a system integrator for your transition to QPS Classic 3.6.

MIGRATION OVERVIEW

The first step in migrating to QPS Classic 3.6 is to contact Quark. Quark will use your existing QPS and QuarkCopyDesk® serial numbers to build a custom QuarkDispatch® Migration Server and a custom version of the QuarkCopyDesk application (called “MigrationCopyDesk”) to help with your migration process.

Quark will also provide XTensions® software for QuarkXPress® and MigrationCopyDesk. See the “QPS 3.6 Deployment Chart” PDF for hardware, operating system, and protocol specifications.



QuarkDispatch Migration Server is available only for Mac OS.

QuarkDispatch Migration Server and MigrationCopyDesk are not required if you do not plan to migrate your old assets to QPS 3.6.

Quark recommends installing QuarkDispatch Migration Server, MigrationCopyDesk, and a copy of QuarkXPress 6.52 for migration on a single designated computer. After you install QuarkCopyDesk 3.6, you will patch it with MigrationCopyDesk. Also, you should use the migration XTensions software for QuarkXPress with only one copy of QuarkXPress 6.52. After you successfully migrate your configuration and assets, you need to uninstall QuarkDispatch Migration Server, MigrationCopyDesk, and the migration XTensions software for QuarkCopyDesk and MigrationCopyDesk.

Although the QPS migration utilities save time by automating certain tasks, the migration process is still time-consuming. Quark recommends backing up your entire production system. Then allow at least a full day for the migration.

In general, the sequence of steps for migrating to QPS 3.6 are as follows:

- 1 Read this migration guide.
- 2 Configure your new QPS file server.

- 3 Install or update Quark® License Administrator (QLA).
- 4 Check in all assets and your configuration file.
- 5 Create a copy of the storage folders that contain all your checked-in assets.
- 6 Create a copy of your checked-in configuration file.
- 7 Install QuarkDispatch Administrator 3.6.
- 8 Install QuarkXPress 6.52.
- 9 Update your XPress Preferences file for your configuration file.
- 10 Edit your configuration file according to the instructions in this migration guide.
- 11 Install QuarkCopyDesk 3.6.
- 12 Install MigrationCopyDesk.
- 13 Install QuarkDispatch Migration Server.
- 14 Migrate QuarkCopyDesk articles.
- 15 Migrate QuarkXPress projects, picture files, and “other” files.
- 16 Migrate QPS client query files.
- 17 Verify the results of the migration.
- 18 Install and launch QuarkDispatch 3.6.
- 19 Verify your complete QPS 3.6 installation.

MIGRATION REQUIREMENTS

This section lists requirements that must be taken into account when migrating to QPS Classic 3.6.

QUARKDISPATCH SERVER REQUIREMENTS (MAC OS)

If QuarkDispatch Server will run on Mac OS, the file system of the volume on which you install the QuarkDispatch Server must be Mac OS Standard or Mac OS Extended — not Mac OS UFS. This requirement also applies to the custom-built QuarkDispatch Migration Server you will request from Quark.

QUARKDISPATCH SERVER REQUIREMENTS (WINDOWS)

If QuarkDispatch Server will run on Mac OS, use the SMB protocol instead of AFP on the Windows-based computer that is running QuarkDispatch 3.6. This will ensure access for Mac OS and Windows clients.

QPS FILE SERVER REQUIREMENTS

Make sure all files are checked in to QuarkDispatch before you begin migrating files. In addition, you must update your “XPress Preferences” file with QuarkXPress 6.52, and then edit your configuration file to use the updated “XPress Preferences” file settings and to confirm the storage folder paths.

If you set up the QPS File Server on Mac OS, use Mac OS Standard or Mac OS Extended — not Mac OS UFS — as the file system.

The volume name for the QPS File Server must be unique. It must be different from the volume name of the computer on which the QuarkDispatch Server is installed.

On Mac OS X, check all the ownership and permissions rights for the volume on which you set up the QPS File Server.

Quark recommends using the SMB protocol to mount the QPS File Server volume, and this requires remapping your storage folder paths in your configuration file by mounting the QPS File Server volume through SMB.

MAC OS X SERVER REQUIREMENTS

Read this section if the QuarkDispatch Server and/or the QPS File Server will be set up on a computer that has Mac OS X server software.

- If only the QPS File Server is set up on a computer with Mac OS X server software, you can share either the entire volume that contains the file server or only the file server folder.
- If both the QuarkDispatch Server and the QPS File Server are set up on a computer that has Mac OS X server software, the entire volume on which the assets are stored must be shared with Read and Write permissions for all the users. Sharing only the respective folders displays an alert to users when they log on to the QuarkDispatch Server.
- When you are logging on to the QuarkDispatch Server, an alert might display notifying you of a TCP/IP connection error. Normally, this error occurs when the operating system software is updated from the Internet. When the software is updated from the Internet, the hostname of the application is modified in the “hostconfig” file.

As a workaround for the third point above, do the following:

- 1** Launch the **Terminal** window (**Applications** → **Utilities** → **Terminal**).
- 2** In the **Terminal** window, change to the “etc” directory using the `cd` command.
- 3** Copy the “hostconfig” file to the “Documents” folder by entering the following command:

```
cp hostconfig ~/Documents/hostconfig.txt
```

- 4 Open the “hostconfig.txt” file in the “Documents” folder. Change the host-name to the Computer Name displayed in the **Sharing** pane of the **System Preferences** dialog box.

```
HOSTNAME=<COMPUTER NAME>
```



If the **HOSTNAME** parameter is not present in the “hostconfig.txt file,” you will need to add a line, including the Computer Name.

- 5 Save the file and exit.
- 6 In the **Terminal** window, enter `sudo mv ~/Documents/hostconfig.txt/etc/hostconfig` to move the “hostconfig.txt” file to the “etc” folder. The “hostconfig.txt” file is copied as “hostconfig” file.
- 7 Restart the computer.

RECOMMENDED MIGRATION STRATEGIES

For a successful migration, observe the following strategies and settings.

STRATEGY FOR UPGRADING TO MAC OS X

QPS 3.6 requires Mac OS X 10.4.7 or later. If your QPS Classic upgrade coincides with an upgrade from Mac OS 9 to Mac OS X, read the following suggestions.

- **Training:** Evaluate the differences between the existing software and the new versions that run natively on Mac OS X and determine whether software training is necessary. Often, applications that run on Mac OS 9 work the same way in Mac OS X and training is not necessary. However, if you see significant differences in your workflow, schedule a training session.
- **Software comparison:** Install and run your existing software on Mac OS X. A safe strategy for migration is to compare a few jobs in parallel by running software on your old operating system and on Mac OS X. This comparison minimizes surprises during migration.

TESTING STRATEGY

While testing QPS Classic, adopt an incremental testing strategy. That is, test each increment before adding the next one to the system. For example, move one publication into the test environment and make sure it runs successfully. Then add publications one by one.

ACCEPTANCE STRATEGY

An acceptance strategy ensures consistency of the QPS Classic software. After you fully migrate to QPS Classic, evaluate your system by performing the following tests:

- Compare the number of assets in the old system to the number of assets in the new system. The numbers must match.
- Check for damaged or corrupt files using QuarkDispatch Manager.
- Ensure that you are able to log on to QuarkDispatch Server through the client components of QPS Classic.
- Ensure that you can access all assets from the QPS File Server.

Chapter 2:

Updating QPS components

Before you begin your migration, you must install QPS Classic 3.6 and upgrade QLA, QuarkCopyDesk, and QuarkXPress.

UPDATING QLA

Regardless of the version of QLA you use at your site, the best approach is to completely uninstall the existing version and then install QLA 4.01. To do so:

- 1 Make a copy of the “QLALicense.dat” file and store it in a safe place.
- 2 Uninstall the server and client components of QLA (3.0, 3.1, 3.3, or 3.5).
- 3 Delete the folder that contains QLA from your computer.
- 4 Install the server and client components of QLA 4.01.

For more information, see the “Guide to QLA” PDF file on the QLA 4.01 CD.

UPDATING QUARKXPRESS

To update your existing copy of QuarkXPress 6.1 to QuarkXPress 6.52, you must first upgrade to QuarkXPress 6.5. For more information, see the “QuarkXPress 6.52 Updater ReadMe” file on the QuarkXPress 6.52 Updater CD.



The QuarkXPress 6.52 updater will update only QuarkXPress 6.5. The QuarkXPress updaters are located on the QPS CDs and on the Quark Web site.

After you upgrade to QuarkXPress 6.52, you must copy the files from the “GOODIES” folder on your QPS Classic 3.6 CD to the appropriate folders in your QuarkXPress application folder.

UPDATING QUARKCOPYDESK

To update QuarkCopyDesk 3.5.x to QuarkCopyDesk 3.6, choose one of the following options:



The QuarkCopyDesk 3.6 updater will update only QuarkCopyDesk 3.5.x. If your copy of QuarkCopyDesk is earlier than 3.5.x, you must install QuarkCopyDesk 3.6.

USING THE INSTALLER

To install QuarkCopyDesk 3.6, run the QuarkCopyDesk 3.6 installer using the new validation code provided with QuarkCopyDesk 3.6. For a fresh installation, a new serial number is generated for the application, and you must download a new QLA license file that includes this serial number.

For more information, see the “QuarkCopyDesk 3.6 ReadMe” file on the QuarkCopyDesk 3.6 CD.

USING THE UPDATER

To update your existing copy of QuarkCopyDesk 3.5.x to QuarkCopyDesk 3.6, run the QuarkCopyDesk 3.6 updater. The serial number of the application remains the same. You do not need to download a new QLA license file or activate the application again to run the updated copy of QuarkCopyDesk.

For more information, see the “QuarkCopyDesk 3.6 ReadMe” file on the QuarkCopyDesk 3.6 CD.

UPDATING QUARKDISPATCH SERVER

To update to QuarkDispatch 3.6 server software, uninstall all previous versions of QPS Classic 1.x/2.x/3.x server components and then run the QPS Classic 3.6 installer.

For more information, see the “Quark Publishing System Classic 3.6 ReadMe” file on the QPS Classic 3.6 CD.



Remember to contact Quark in advance so you will have your QuarkDispatch Migration Server configured and delivered before you begin the migration.

Chapter 3: Migrating to QPS 3.6

This chapter provides detailed steps for migrating to QPS Classic 3.6. It is important that you follow the procedures in this chapter in the order they are listed.



Quark recommends using a system integrator for your transition to QPS Classic 3.6.

CONFIGURING THE QPS FILE SERVER

There are three options for QPS file server migration: A new computer with new assets, a new computer with migrated assets, or an existing computer with existing assets.

- If you plan to use a new computer and will create all new assets, you can use your old configuration file or create a configuration file.
- If you plan to migrate your assets to a new QPS File Server, you must edit your old configuration file to recognize the storage folder paths to your new QPS File Server computer. You must use SMB protocol (not AFP). Quark recommends copying your entire storage folder structure to the new computer before you edit your old configuration file. Deleting assets you don't need is easier than retrieving an old asset after you migrate to QPS Classic 3.6.
- If you plan to use your existing QPS File Server and your current assets, you must use SMB protocol and then edit your existing configuration file to remap the storage folder paths.



Always keep a backup copy of your existing QPS File Server to ensure you retain all your assets if issues arise during the migration process.

Regardless of the approach you choose for your QPS File Server, make sure all files are checked in to QuarkDispatch before you begin migrating files. In addition, you must update your "XPress Preferences" file with QuarkXPress 6.52, and then edit your configuration file to use the updated "XPress Preferences" file settings and to confirm the storage folder paths.

UPDATING XPRESS PREFERENCES



This section applies only to versions of QPS prior to 3.5.8. If you are using QPS Classic 3.5.8, you have already upgraded to QuarkXPress 6.52. Skip to “Updating the configuration file.”

You must upgrade to QuarkXPress 6.52 for Mac OS and create a master “XPress Preferences” file to use with QPS Classic 3.6. You can create style sheets and other specifications, or you can append these components from existing QuarkXPress projects or templates. See your QuarkXPress documentation for more information.

If you do not have a document or template that contains the style sheets, lists, colors, H&Js, and Dashes & Stripes you want to include in your QPS Classic 3.6 configuration file, create one before performing the following steps.

- 1 Locate the “XPress Preferences” file (**User → Library → Preferences → Quark → QuarkXPress 6.0**).
- 2 Move the “XPress Preferences” file to a new location. A default “XPress Preferences” file is created when you relaunch QuarkXPress. (The “XPress Preferences” file you moved can be returned to the “Preferences” folder once you create a master “XPress Preferences” file and import it into your configuration file.)
- 3 Launch QuarkXPress 6.52 for Mac OS. Do not open any projects.
- 4 Choose **File → Append**. The **Append** dialog box displays.
- 5 Locate a project or template that contains the specifications you want in your configuration file, and click **Open**. A list of specifications displays.
- 6 Select specifications and click the **Append Items** arrow to add them to the “XPress Preferences” file. Click **OK** after you selectively add specifications.
- 7 Repeat steps 4–6 for each project or template from which you want to append specifications.
- 8 Choose **QuarkXPress/Edit → Preferences**. The **Preferences** dialog box displays.
- 9 Click **Measurements** in the list on the left to display the **Measurements** pane. Specify your points-per-inch conversion settings and ciceros-to-centimeter conversion settings.
- 10 Click **Paragraph** and specify leading, baseline grid, and hyphenation method settings.
- 11 Click **Character** and specify your character preferences.
- 12 Click **OK** to close the **Preferences** dialog box.

- 13 Choose **Utilities → Hyphenation Exceptions** to display the **Hyphenation Exceptions** dialog box. Enter the words and rules that meet your hyphenation exceptions, and then click **OK** to close the **Hyphenation Exceptions** dialog box.
- 14 Choose **Utilities → Tracking Edit**. The **Tracking Edit** dialog box displays.
- 15 Select a font for which you want to specify automatic tracking rules and click **Edit**. The **Tracking Values for ** dialog box displays.
- 16 Specify values for font sizes and click **OK**. Repeat this process for every font you choose within your workflow. Click **Save** when you address every font.
- 17 Choose **Utilities → Kerning Table Edit**. The **Kerning Table Edit** dialog box displays.
- 18 Select a font for which you want to specify automatic values for character pairs. The **Kerning Values for ** dialog box displays. Enter characters in the **Pair** field and values in the **Value** field and click **Add**. Click **OK**, and then click **Save** to close the **Kerning Table Edit** dialog box.
- 19 Quit QuarkXPress.

You can now import the new XPress Preferences settings into your configuration file.

UPDATING THE CONFIGURATION FILE

After you create your master “XPress Preferences” file, the next steps entail updating your configuration file to include the new master preferences, remapping the QPS File Server storage path using SMB, and (if your workflow requires edit tracking) specifying privileges and settings for the Advanced Redline functionality in QPS Classic 3.6.

In addition, you must create a new text header field called “Migrated,” which is required for the migration process. See steps 12–16 below for details.

- 1 Launch QuarkDispatch Administrator 3.6, but do not log on to a QuarkDispatch server.
- 2 Connect to your QPS File Server using SMB.
- 3 Choose **File → Open**, navigate to the configuration file for your existing QuarkDispatch server, and click **Open**.



Some users at QPS sites prefer to choose **File → New** and rebuild a configuration file. Whether you create a new configuration file or update your existing configuration file, continue with the following steps.

- 4 Choose **File → Display Diagnostic Report**. Review the information about the configuration file in the **Diagnostic Report** window, and check for any issues with the file. If necessary, modify your configuration file to enter missing data. For example, if your new QPS File Server setup is incorrect, the **Diagnostic Report** will notify you of the issue and allow you to correct the storage folder paths.



Quark recommends that you look for unnamed or incorrectly labeled article component types. If you find any inappropriate component types, you can delete and recreate them.

- 5 If you maintain preferences at the server level and selectively include them within publications, click **XPress Preferences** at the server level and complete the next two steps. However, if your publications require independent XPress Preferences settings, you must create separate “XPress Preferences” files for each publication and then replace them according to the following steps.
- 6 Click **Replace**. The **Open:** dialog box displays.
- 7 Navigate to the QuarkXPress 6.52 “XPress Preferences” file you created and click **Open**.



Quark recommends that you look for unnamed or incorrectly labeled style sheets after you import XPress Preferences. If you find any inappropriate style sheets, you can delete and re-create them in QuarkXPress 6.52, and then replace the XPress Preferences in your configuration file.

- 8 If you want to assign a specific redline color to a user, double-click the user’s name at the server level, click **Assign Redline color to User**, and choose a color.
- 9 If you want to enable a user to accept and reject changes that have been tracked with the redline functionality, edit the user’s user class and check **Accept And Reject Changes (Selected/Displayed/All)**.
- 10 At the publication level, you can edit individual statuses to enable redline tracking. You can also control the **Accept And Reject Changes (Selected/Displayed/All)** privilege according to the status (under the **Editing** section of the **QuarkCopyDesk** privileges list).
- 11 If you plan to “jump stories” (create QuarkCopyDesk articles from text boxes in two separate QuarkXPress projects) in your workflow, you must enable the privilege to **Drag and drop components to form primary and secondary attachments (multilinks)** in the **Articles** section of the **QuarkDispatchXT software for QuarkXPress** privileges list.



For information about redline tracking features and jumped stories, see the *QPS Classic 3.6 Addendum*.

- 12 Select the server level, and click the **Headers** button.
- 13 Choose **File Class** → **All**.
- 14 Choose **Edit** → **New Field**.
- 15 Enter `Migrated` for the field name.
- 16 Make sure this “Migrated” header field is a Text field type (**Edit** → **Edit Field** → **Field Type** → **Text**). Newly created header fields are **Text** field types by default. This header field will display TRUE for every asset that migrates successfully.
- 17 Save the configuration file as a new file (**File** → **Save As**).



If your old configuration file contains user-defined header fields that are duplicated in more than one publication or section, see “Correcting header fields.”

USING THE QUARKDISPATCH MIGRATION SERVER

After you have mapped your QPS File Server location in your updated configuration file, perform the following steps:

- 1 Launch the QuarkDispatch Migration Server on a Mac OS computer. Make sure it successfully displays in Dormant mode.
- 2 Launch QuarkDispatch Administrator 3.6.
- 3 Choose **File** → **Open** and open the configuration file you saved in the “Updating the configuration file” section.
- 4 Choose **QuarkDispatch** → **Log On**. The **QuarkDispatch Log-On** dialog box displays.
- 5 Choose the QuarkDispatch Migration Server and click **OK**.
- 6 Choose **QuarkDispatch** → **Check In Configuration File**. The **Check in Configuration File** dialog box displays.
- 7 Enter a revision comment and click **OK**.

MIGRATING FILES TO QPS CLASSIC 3.6

If you have already upgraded to QPS Classic 3.5.x, you can skip to “Transitioning to QuarkDispatch 3.6.”

If you are upgrading from a version earlier than QPS Classic 3.5.x, using the QuarkDispatch Migration Server is mandatory. To ensure that all files will be recognized by QPS Classic 3.6, you must log on to the Migration Server and then

check out and check in all the assets you want to migrate. Although you can manually check out each file and check it back in again, Quark created custom XTensions software that automate the migration process for QuarkCopyDesk articles, picture files, and QuarkXPress projects. See “Using Migration XTensions software” below. Also, you can create scripts to automate the process.

Accessing your assets depends on your QPS File Server strategy. If you plan to use your existing QPS File Server, updating the configuration file with the same storage folder paths (and updating XPress Preferences) is sufficient. If you are using a new computer as your QPS File Server, the easiest method entails copying the entire storage folder structure to the new computer and updating your configuration file to recognize the new storage folder paths (as well as the updated XPress Preferences).

However, if you are upgrading from QPS Classic 2.2 or later and you create new storage folders instead of copying your old storage folders to the new computer, you can use QuarkDispatch Manager to create a mapping set for replicating assets to the Migration Server before checking them out and back in again. You can also use a mapping set if you plan to migrate a portion of your current QPS configuration. See “Performing a partial migration.”



For the migration process, Quark recommends using one computer for installing a copy of QuarkXPress 6.52, MigrationCopyDesk, and XTensions software for MigrationCopyDesk and QuarkXPress. After you successfully migrate your assets, you must uninstall MigrationCopyDesk and the migration copy of QuarkXPress 6.52.

USING MIGRATION XTENSIONS SOFTWARE

Quark created XTensions software modules for QuarkCopyDesk and QuarkXPress to automate the asset migration process. When you contact Quark to upgrade to QPS 3.6, you will receive access to files for the upgrade process. See the QPS 3.6 *ReadMe* file for more information about the files you will receive.

Make sure that no assets are checked out before you begin migrating assets. You can query for all checked-out assets by entering !=” for the “Checked out by” header field. Either abort the check-outs or check in the assets.

The migration sequence is very important. You start with your customized version of QuarkCopyDesk, which is designed solely for the article migration process. Then you will use the Migration XTensions software for QuarkXPress to migrate QuarkXPress projects, pictures, other files.

MIGRATING QUARKCOPYDESK ARTICLES

- 1 Install QuarkCopyDesk 3.6 on the computer dedicated for the migration process.
- 2 Back up your QuarkCopyDesk 3.6 folder.
- 3 Replace your QuarkCopyDesk application file with the customized QuarkCopyDesk migration application file you received from Quark (called “MigrationCopyDesk”).
- 4 Replace the “MS-Word 6–2000 Filter.cxt” file in the XTensions folder in your QuarkCopyDesk application folder with the “MS-Word 6–2000 Filter.cxt” file you received from Quark for the migration process.
- 5 Launch MigrationCopyDesk.
- 6 Log on to the Migration QuarkDispatch Server using an administrator’s log-on information (or another user with all privileges for QuarkCopyDesk and access to all publications and sections).
- 7 Choose **Utilities → Migrate Articles**. The XTensions software will automatically check out each QuarkCopyDesk article, convert the format to QuarkCopyDesk 3.6, and check in each article. You will see this process, and a message displays when the process completes.



The log-on user name you entered in step 6 will display in the “Last modified by” header field for all migrated articles.

- 8 If the XTensions software encounters problems, it will skip to the next QuarkCopyDesk article and continue the migration process. You can read the log summary file (MigrationArticles.txt) at the root level of your QuarkCopyDesk application folder to identify the files and then migrate them manually. The MigrationArticles.txt file is tab delimited, so you can also view it in an application that displays tab-delimited files.



If MigrationCopyDesk unexpectedly quits during the migration process, relaunch MigrationCopyDesk, query for checked-out articles, abort the article check-outs, and then choose **Utilities → Migrate Articles**. The migration process will continue from the point of failure.

MIGRATING PROJECTS, PICTURES, AND OTHER FILES

- 1 Install QuarkXPress 6.52 on the computer dedicated for the migration process.
- 2 Install the QPS XTensions for QuarkXPress.
- 3 Remove Jumps XT.xnt and QuarkDispatch XT.xnt.

- 4 Copy all the files in the “QPS XTensions for XPress” folder you received from Quark to the XTensions folder in your QuarkXPress 6.52 application folder. These files include MigrationDXT.xnt XTensions software.



The migration process will not work properly if you don't install all the QPS XTensions for QuarkXPress you received from Quark.

- 5 Launch QuarkXPress 6.52.
- 6 Log on to the Migration QuarkDispatch Server using an administrator's log-on information (or another user with access to all publications and sections and all privileges for using the QuarkDispatch XTensions software for QuarkXPress).
- 7 If you are using QuarkXPress Passport®, choose **Edit → Program Language → U.S. English** or **International English**.
- 8 Choose **Utilities → Migrate Projects**. The XTensions software will automatically check out each QuarkXPress project, convert the format to QuarkXPress 6.52, and check in each project. You can see the projects being checked out and checked in, followed by a confirmation message when the project migration completes.
- 9 Choose **Utilities → Migrate Pictures**. Progress does not display on screen, so wait until a message confirms that the picture migration is complete.
- 10 Choose **Utilities → Migrate Others**. Progress does not display on screen, so wait until a message confirms that the migration is complete.
- 11 If the XTensions software encounters problems, it will skip to the next file and continue the migration process. You can read the log summary files at the root level of your QuarkXPress application folder to identify the files and then migrate them manually. These log files are called “MigrationProjects.txt,” “MigrationPictures.txt,” and “MigrationOtherFiles.txt.” These log files are tab delimited, so you can also view them in an application that displays tab-delimited files.



If QuarkXPress unexpectedly quits during the migration process, relaunch QuarkXPress, query for checked-out files, abort the check-outs, and then choose **Utilities → Migrate <File Type>**. The migration process will continue from the point of failure.

The log-on user name you entered in step 4 will display in the “Last modified by” header field for all migrated assets.

- 12 If you used a dedicated computer for the migration process, uninstall QuarkXPress 6.52 from that computer, and the process is complete.

- 13 If you used your production copy of QuarkXPress 6.52 for the migration process, remove MigrationDXT.xnt from the XTensions folder in your QuarkXPress 6.52 application folder.
- 14 If you used your production copy of QuarkXPress 6.52 for the migration process, return the QuarkDispatchXT.xnt and Jumps XT.xnt files to the XTensions folder in your QuarkXPress 6.52 application folder.

PERFORMING A PARTIAL MIGRATION

If you are upgrading from QPS Classic 2.2 or later and you plan to migrate a portion of your QuarkDispatch server, you can use QuarkDispatch Manager to create a mapping set for the partial migration. For example, if you want to migrate one of three publications, you can create a mapping set that identifies the source publication on your old QuarkDispatch server and the destination publication on the Migration Server. Using a mapping set is easier than trying to manually move files before you check them out and back in again.

To create a mapping set for moving one publication:

- 1 Launch your Migration Server.
- 2 Launch QuarkDispatch Manager 3.6 and log on to your existing QuarkDispatch server.
- 3 Choose **QuarkDispatch** → **Edit Mapping Sets** → **Log On**. The **QuarkDispatch Log-On** dialog box displays.
- 4 Choose your Migration Server from the **Server** drop-down list, enter your user name and password, and click **OK**. The **Mapping Sets** dialog box displays.
- 5 Click **New**. The **Edit Mapping Set** dialog box displays.
- 6 Enter text in the **Name** field to indicate the publication you plan to migrate.
- 7 Select the publication from the **Publication** drop-down list and click **OK**.



Although the primary function of this mapping set is to move files, you can also map header fields. For example, you can reroute files assigned to User X on the old server to route to User Y on the Migration Server.

- 8 Click **Save** to close the **Mapping Sets** dialog box.
- 9 Perform a query to display all assets in the publication you want to replicate, and then select all the files in the query window.
- 10 Choose **QuarkDispatch** → **Replicate** → **<Migration Server name>**, and then choose your new mapping set from the list. An alert displays. Click **Yes** to replicate all file revisions with the current versions.
- 11 When the replication process is complete, continue with the steps below.

TRANSITIONING TO QUARKDISPATCH 3.6

After you have converted your assets into the QPS 3.6-compatible format, you must transition to your QuarkDispatch 3.6 server. You have two options: You can manually place the updated configuration file in your QuarkDispatch 3.6 application folder, or you can use QuarkDispatch Administrator 3.6 to check in the updated configuration file.

MANUALLY PLACING AN UPDATED CONFIGURATION FILE

To manually place an updated configuration file:

- 1 Shut down the QuarkDispatch Migration Server.
- 2 Copy the checked-in configuration file from the QuarkDispatch Migration Server application folder.
- 3 Place the checked-in configuration file in the QuarkDispatch 3.6 application folder.
- 4 Mount the QPS File Server volume.



Refer to the “QPS 3.6 Deployment Chart” PDF to determine the recommended protocol for mounting the QPS File Server volume with your specific hardware.

- 5 Launch the QuarkDispatch 3.6 service.
- 6 Click **Start QuarkDispatch**. The QuarkDispatch 3.6 server reads all the assets in the QPS File Server and runs in Normal mode. Your QuarkDispatch server is now ready to be used in production.

CHECKING IN AN UPDATED CONFIGURATION FILE

To check in an updated configuration file:

- 1 Shut down the QuarkDispatch Migration Server.
- 2 Make sure you can access the updated configuration file from the computer on which you will run QuarkDispatch Administrator 3.6.
- 3 Map or mount the QPS File Server volume through the SMB protocol, and then launch the QuarkDispatch 3.6 service.
- 4 Click **Start QuarkDispatch**. Make sure the server successfully enters Dormant mode.
- 5 Launch QuarkDispatch Administrator 3.6.
- 6 Choose **File → Open**, navigate to the updated configuration file, and click **Open**.
- 7 Choose **File → Save as** and save it as a new configuration file on the local machine.

- 8 Mount the QPS File Server and QuarkDispatch 3.6 server volumes on the machine on which QuarkDispatch Administrator 3.6 is running.



Refer to the “QPS 3.6 Deployment Chart” PDF to determine the recommended protocol for mounting the QPS File Server volume with your specific hardware.

- 9 Choose **QuarkDispatch → Log On**. The **QuarkDispatch Log-On** dialog box displays.
- 10 Choose your QuarkDispatch 3.6 Server (currently running in Dormant mode) and click **OK**.
- 11 Choose **QuarkDispatch → Check in Configuration File**. The **Check in Configuration File** dialog box displays.
- 12 Enter a revision comment, and click **OK**. Your QuarkDispatch server is now ready to be used in production.

MIGRATING CLIENT QUERY FILES

If you want to migrate custom query files on client workstations, begin by making backup copies of your clients’ existing query files (so you can revert to them if necessary). Then perform the following steps:

- 1 Launch the QPS Classic 3.6 client application.
- 2 Display a **Query** palette and click **Edit Queries** to display the **Queries** dialog box.
- 3 Click **Append**.
- 4 Navigate to the query file, select it, and click **OK**.
- 5 Test the query files after migrating your assets to QPS Classic 3.6.



By default, QPS Classic 3.6 stores query files in a new location. The new location on Mac OS is **Library → Preferences → Quark → Queries → <application name> Queries**. The new location on Windows is **C:\Documents and Settings\<user name>\Application Data\Quark\Queries\<application name> Queries**.

However, if you prefer to store query files where they are stored in earlier versions of QPS Classic, create a folder named “<application name> Queries” at the root level of each QPS application.

CORRECTING HEADER FIELDS

Whether you create a configuration file or migrate your old configuration file, certain user-defined header fields will not be visible to QPS client users if the header fields were created at the publication or section level and you subsequently duplicated the publication or section. The header fields display in the configuration file for QuarkDispatch Administrator 3.6 users, but the header fields do not display for QPS client users.



The instructions in this section are for migrated configuration files. For new configuration files, avoid this issue by not creating header fields and then duplicating the publication or section. Use **Edit** → **Paste Field** instead. Or, create header fields at the server level and selectively include them in publications and sections.

When you launch QuarkDispatch 3.6 with a configuration file that contains duplicate header fields that were created by duplicating the publications or sections in which the headers were created, the “QuarkDispatch.log” file identifies the issue. The log file identifies the duplicate header fields and the publications and sections that contain them and displays the following alert: “The field will not be available for duplicated publications/sections.”

To resolve this configuration file issue, move these duplicated user-defined header fields from the section level to the publication level, and move publication-level header fields to the server level. You can’t simply create new header fields with the same name because QuarkDispatch recognizes header fields based on internal identification. To retain these header field values for assets you plan to migrate to QPS 3.6, you must move the user-defined header fields.

Perform the following steps:

- 1 Launch QuarkDispatch 3.6.
- 2 Click the **Diagnostics** tab, and then click **View Log**. The “QuarkDispatch.log” file displays.
- 3 Search for “The field will not be available for duplicated publications/sections.” This alert identifies the header field names and the publications and sections that contain them.
- 4 Create a copy of your old configuration file and open it in QuarkDispatch Administrator 3.6.

- 5 If it is not already open, open the configuration file you saved in the “Updating a configuration file” section of this document. This configuration file is the one you will edit. Use the other open configuration file for reference.



Viewing both configuration files helps you compare the header views and settings so you can re-create them more easily.

- 6 Starting at the section level, locate all instances of a user-defined duplicate header field reported in the “QuarkDispatch.log” file. To locate these instances, select a section and then choose each option from the **File Class** drop-down list (**All**, **Article**, **Article Component**, **Picture**, **Project**, and **Other**).
- 7 In all but one section, select the user-defined duplicate header field and choose **Edit → Clear Field**. When you are finished clearing these fields, only one header field should remain in a section.
- 8 Locate the remaining user-defined header field and choose **Edit → Cut Field**.
- 9 Select the publication that contains the duplicated sections and click **Headers**.
- 10 Select the **File Class** drop-down list and choose the header field’s file class.
- 11 Choose **Edit → Paste Field**.
- 12 Click **Edit Header View** to specify display of the header field. The **Header View** dialog box displays.
 - If you want the header field to display for users, make sure the pasted header field is in the **Header View** list (and not the **Undisplayed Fields** list on the right side of the **Header View** dialog box).
 - If you want the header field to be hidden, make sure it is in the **Undisplayed Fields** list.

Click **OK**.
- 13 Repeat steps 6–12 until you have moved all user-defined duplicate header fields for each file class. This process effectively creates a new “master” header field that you can then include in the sections of a publication. The number of header fields and file class designations determine how many times you must repeat the steps.
- 14 Repeat steps 6–13 to move duplicated user-defined header fields from the publication level to the server level.
- 15 Save your configuration file and then check it into your QuarkDispatch server.
- 16 Click the **Diagnostics** tab, and then click **View Log**. The “QuarkDispatch.log” file displays.
- 17 Search for “The field will not be available for duplicated publications/sections.” If the alert displays, repeat the steps in this section until all headers are corrected.